

KRONOLOGIC

HOW TO GUIDE

Microsoft Dynamics Integration

Microsoft Dynamics Integration Overview

Objective

Ability to integrate with the Microsoft Dynamics to allow import of contacts and leads without the need of CSVs

Authentication

Kronologic uses the standard OAuth 2.0 protocol to authenticate; the open protocol enables authorization and a secure data sharing between Kronologic and Salesforce.

API Call Volume

Kronologic checks Dynamics for contact and lead records changes every 2-3 minutes, and throttles API calls:

- 800 calls per hour
- Each call can import up to 2k new/updated records



Microsoft Dynamics™

Prerequisites

Create a secure Dynamics integrated user

Kronologic recommends creating an integrated user in your organization solely for integration purposes. That way, if an actual user leaves your organization, you'll always have a user with the correct permissions available.

User Permissions

Assign the appropriate permission set to the integration user. Kronologic will work with your Dynamics admin to define the right permission set based on what is required to fulfill the business requirements and needs

Microsoft Knowledge Base: Add Users

<https://docs.microsoft.com/en-us/dynamics365/mixed-reality/guides/add-users>

Microsoft Knowledge Base: Assign user permissions

<https://docs.microsoft.com/en-us/dynamics365/customer-insights/permissions>

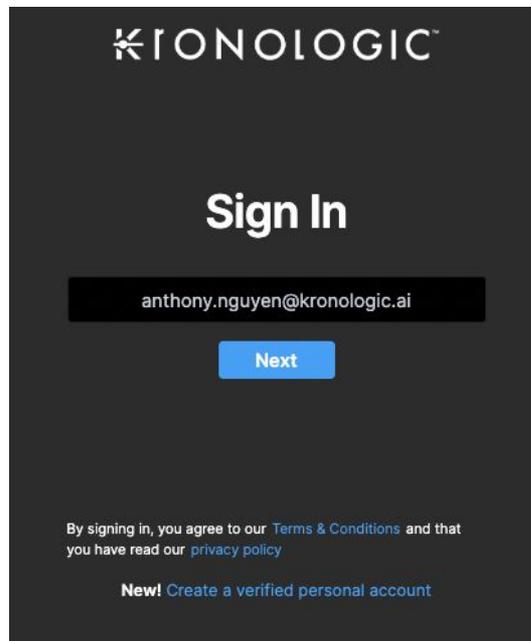


Log into Kronologic

Open your browser and go to
us.app.kronologic.ai

Enter in your corporate email address and click
Next

If SSO is activated, you do not need to enter in your password. Otherwise, please enter in your password to log in.



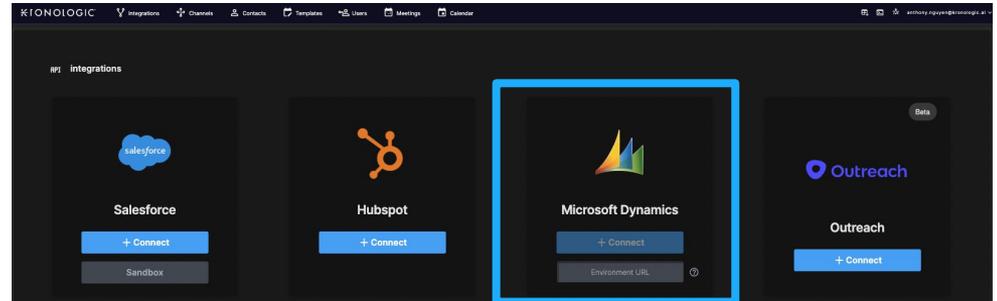
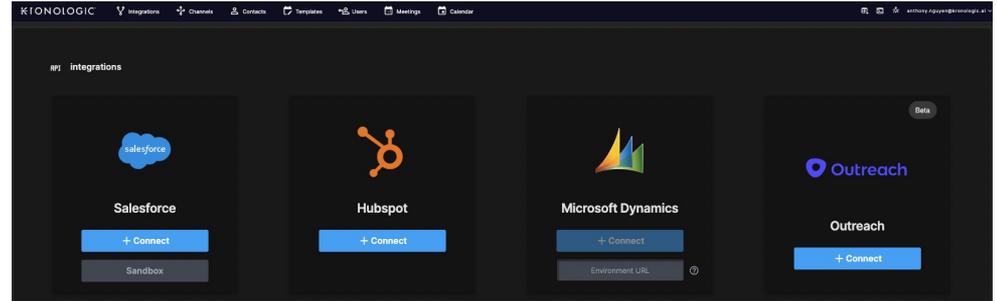
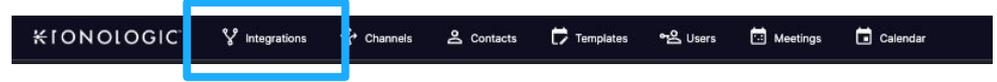
Navigate to Integrations

Navigate to the **Integrations** option

If the Integrations option on the menu is not available, you may not have admin rights to access. Please reach out to your Kronologic administrator to ensure you have the right permission.

Click on the **Integrations** option and the integrations page will load

Locate the Microsoft Dynamics option and enter in the **Environment URL** then click **+Connect** execute the prompt to the Microsoft Dynamics login page



Dynamics Integrated User Log in

Log in with the Dynamics integrated user credentials



Sign in

Email, phone, or Skype

No account? [Create one!](#)

[Can't access your account?](#)

Back

Next

 Sign-in options



Confirm Microsoft Dynamics integration is successful

If you have successfully logged in with correct credentials in Dynamics, Kronologic will automatically navigate back to the API Integrations page. If the integration is successful, it will display – **Disconnect**

The Microsoft Dynamics integration is now complete and Channels now can be created to import leads and/or contacts into Kronologic.

