

Microsoft Dynamics CRM On-Premise Connector

Overview

DBSync Microsoft Dynamics CRM On-Premise connector allows you to move data in, and out, of Microsoft Dynamics CRM On-premise. You can use this connector to move data in, and out, of Microsoft Dynamics CRM and other applications to (1) populate data warehouses; (2) synchronize customer master databases; and (3), streamline transaction details and online payments to reduce double data entry by saving time and money. The connector connects directly to your Microsoft Dynamics CRM On-Premise instance. As a result, it enables you to query, add, modify and delete various types of records.

Prerequisites

To establish a connection to Microsoft via DBSync MSCRM online connector, a user must:

- Have a valid license to DBSync MSCRM online connector, username and password to connect to DBSync iPaaS platform.
- Have a valid username, password of MSCRM online application with sufficient permission to perform CRUD operations.

Connector Configurations

MSCRM on-premise connector instance represents a single MSCRM account, including login credentials. If a user wishes to connect to multiple instances of the either sandbox/production then, s/he must create a separate connection for each MSCRM instance.

The table below represents parameters required for opening the connection to MSCRM on-premise version.

Property	Description	Required
Username	Specifies the username associated with CRM login credentials.	Yes
Password	Specifies the password for the username associated with the login credentials.	Yes
MSCRM Soap URL	Specifies the URL to the Microsoft Dynamics CRM server. The URL can be HTTP or HTTPS. The port is optional if it is HTTP over port 80; or, HTTPS over port 443. The server URL is typically in the format of <code>http://crm-server:port/organization-name</code> . Please note that the organization name is required.	Yes
AUTH Type	Specifies the authentication type of connecting to Dynamics 365 instance. Valid values are AD , IFD and LiveID . <ul style="list-style-type: none">• AD(Active Directory) and IFD (Internet Facing Deployment) are permitted for Dynamics 365 on-premises instances only.• WLID(Windows Live Id) Microsoft account or MSA (Windows Live ID) is a single sign-on web service developed and provided by Microsoft that allows users to log into Dynamics CRM online version.	Optional
Proxy post URL	If you use a proxy server then, enter the <<proxy IP or host>>.	Yes
Proxy username	If you use a proxy server then, enter the <<proxy username>>.	Optional
proxy password	If you use a proxy server then, enter the <<proxy password>>.	Optional
Domain	Specify the domain hostname to verify the login credentials.	Optional

After a connector is created within a project, set up the connector within the project. DBSync can then map to, and from, the systems which are supported by our standard connector list. It can use MSCRM on-premise connector to retrieve data from, or send data to, MSCRM on-premise version.

Click on the following link [Connectors List](#) to learn about all the connectors we support.

Uses Of MSCRM Online Connector

- DBSyncs MSCRM On-premise connector empowers MSCRM On-Premise users to generate complex business rules with ease.
- Export and Import data from databases and many sources like, [Salesforce.com](#), SugarCRM, for migration.
- Replicate cloud data in-house easily to build your data warehouse or master data management.
- Integrate and reduce data entry with ERP applications like NetSuite, ranging from on-premise applications like, QuickBooks desktop and others to, on-demand applications like, Intacct and QuickBooks online, with ease.

Supported Versions

Only the following Microsoft Dynamics CRM versions are supported:

- Microsoft Dynamics CRM 2016 (on-premise)
- Microsoft Dynamics CRM 2015 (on-premise)
- Microsoft Dynamics CRM 2013 (on-premise)
- Microsoft Dynamics CRM 2011 (on-premise)

Permissions

The following are the list of permission required for a user to connect with DBSync Application:

- Active user license for all the apps that would need integration such as Sales, Customer Service etc.
- The user has to be an Admin of their D365 Instance or a Global Admin with D365 license
- The user should have full read/write permissions to access the entities that will be connected to DBSync for integration

Frequently Asked Questions

Q: What versions of Microsoft Dynamics CRM does this connector support?

A: This connector supports Microsoft Dynamics CRM 2011(on-premise) version and later.

Q: Can I get a free trial version of DBSync?

A: DBSync is available for 15-day free trial after completing the registration process.

Q: Does this connector support bi-directional Sync?

A: Yes. Furthermore, if you so choose, you can also make it uni-directional.

Q: Is this profile available with, On-demand and On-premise, versions of DBSync?

A: Yes. This connector supports both versions.

Q: Can I create custom mappings in DBSync?

A: Yes. DBSync is a completely flexible solution and it fully supports custom mappings.

Q: What all operations can be performed using this connector?

A: Any of standard create, retrieve, update, delete(CRUD) operations can be performed on all of CRM entities and additionally you can use also native Fetch XML for writing queries.

Useful hint

[MS Dynamics CRM website](#)

[MS Dynamics Documentation](#)