Microsoft Dynamics CRM Online Connector

Overview

DBSync Microsoft Dynamics CRM Online connector allows you to move data in, and out, of Microsoft Dynamics CRM Online. 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 Online 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

An 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 online user instance.

Property	Description	Required
Username	Specifies the username associated with CRM online login credentials.	Yes
Password	Specifies the password for the username associated with the login credentials.	Yes
Endpoint	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 for Microsoft Dynamics CRM Online is https://*organization-name*.crm.dynamics.com. Please note that the organization name is required.	Yes

After a connector is created within a project, set up the connector within the project. DBSync can then map to, and from, the systems that 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 all 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 - ranging from on-premise applications like, QuickBooks desktop and others to, on-demand applications like, Intacct and QuickBooks online, with ease.

Supported Versions

Following Microsoft Dynamics CRM versions are supported:

- Microsoft Dynamics CRM 2016 (online)
- Microsoft Dynamics CRM 2015 (online)
- Microsoft Dynamics CRM 2013 (online)
- Microsoft Dynamics CRM 2011 (online)

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 profile support?

A: This connector supports Microsoft Dynamics CRM Online 2011 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 connector 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 CRM entities. Additionally, you can also use native Fetch XML for writing queries.

Useful hint
MS Dynamics CRM website

MS Dynamics Documentation