

Workstation – CRM Dynamics Integration

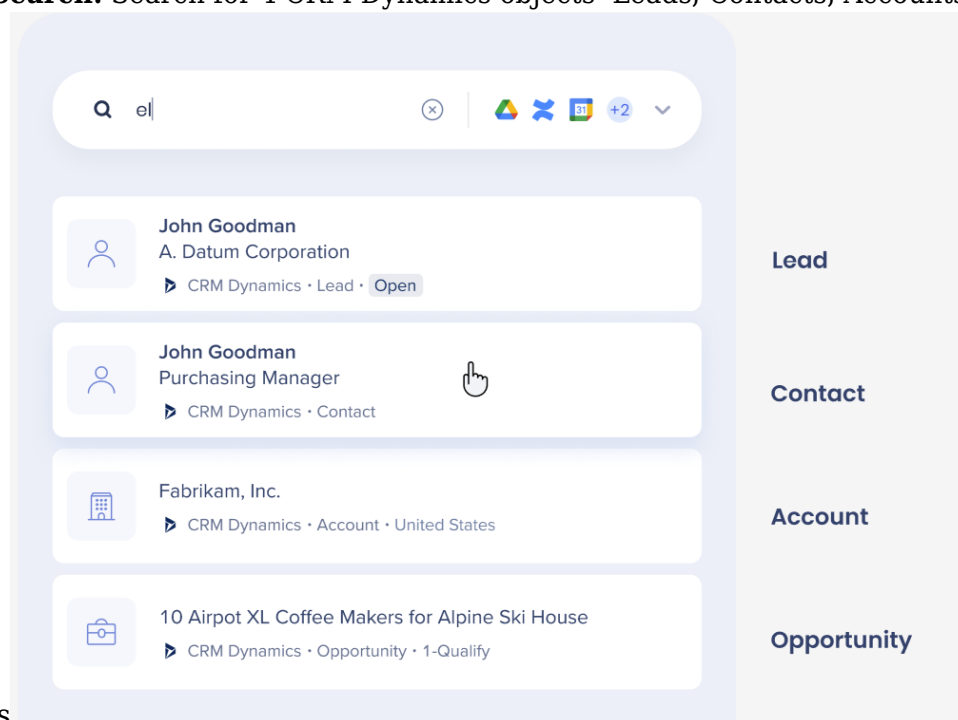
Brief Overview

Microsoft Dynamics 365 is a product line of enterprise resource planning (ERP) and customer relationship management (CRM) intelligent business applications.

Easily integrate the CRM application within [WalkMe's Enterprise Search](#) and the new My CRM Tasks widget.

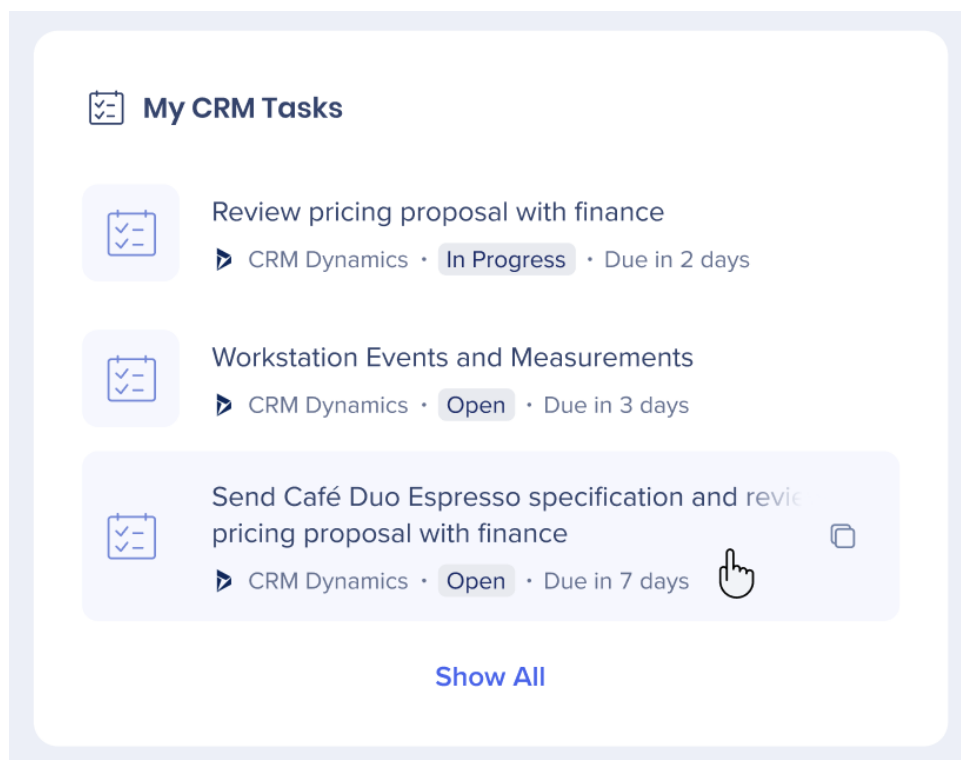
Use Cases

1. **Enterprise Search:** Search for 4 CRM Dynamics objects- Leads, Contacts, Accounts and



Opportunities

2. **'My CRM Tasks' widget:** View and access open tasks using the 'My CRM Tasks' widget

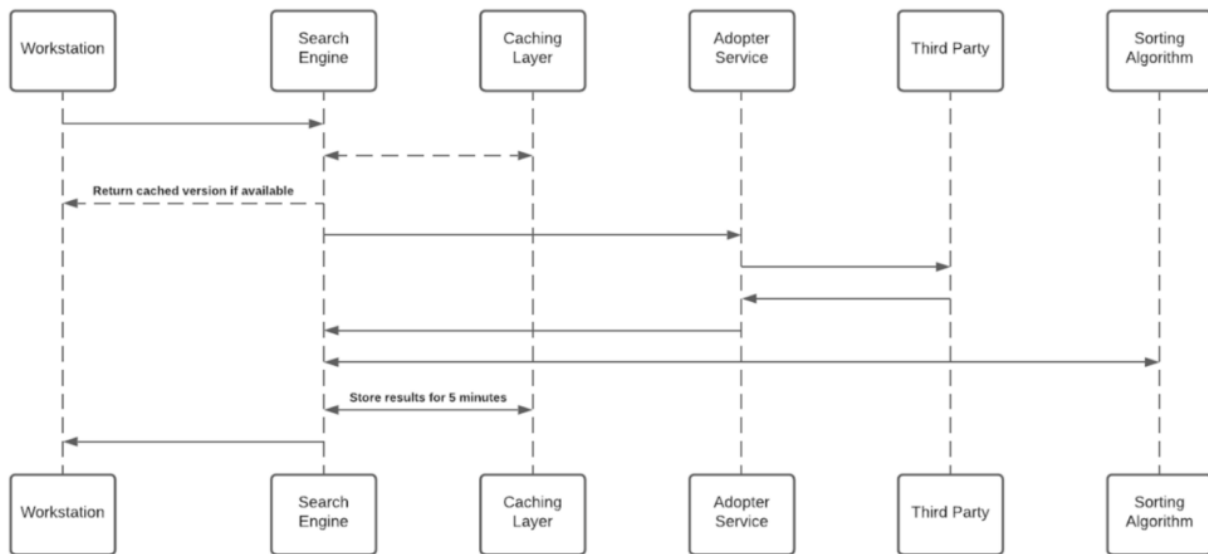


Security Overview

The Enterprise Search uses 3rd-party integrations to implement a “federal search”. Searches within Workstation are backed by an NLP engine, and a graph database that supports a great user experience.

Workstation Enterprise Search doesn’t index 3rd-party data on an independently searchable database.

See below sequence diagram describes the searching algorithm:



Notes

1. Cache layer saves results for a period of five minutes
2. Each Adopter Service creates a unique identifier for the results which is meaningless without access to the 3rd-party and stores it in the graph database

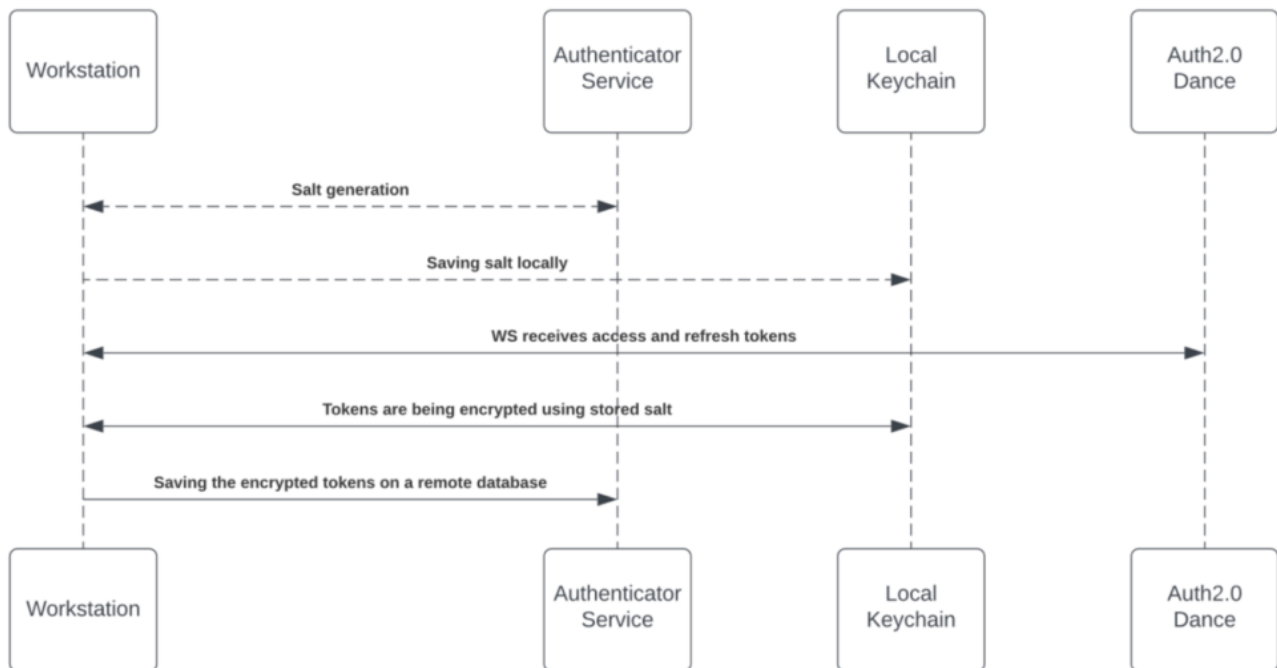
3rd-Party Access and Refresh Tokens

To activate the Enterprise Search (and the Personalized Workspace widgets), each employee is required to grant Workstation permission to access the 3rd-party.

The granting process is using the OAuth2.0 protocol. Each time a new access token is granted to the Workstation, the application will encrypt the access and refresh tokens and store it in a remote database.

The encryption process includes a unique private key ("salt") that is generated for each individual at the very first bootstrap and stored in the local machine Keychain. The salt is irreplaceable and not restorable - losing it causes the access tokens to be voided. This security measure is being taken to eliminate identity spoofing when accessing high-sensitive data.

See the diagram below to review the salt generation and storage flow.



Accessing 3rd-Party Content

Accessing 3rd-party content requires end-user consent, and in some cases, mostly on Microsoft products, an organization admin consent. End-users grant Workstation the necessary permission by approving an OAuth2.0 consent screen that is being triggered by them from the Workstation application ("Third-party apps").

The third-party apps are being approved and verified by third-parties products. By the end of the granting process, the third-party apps provide access and refresh tokens that are used by the search engine to establish the requests.

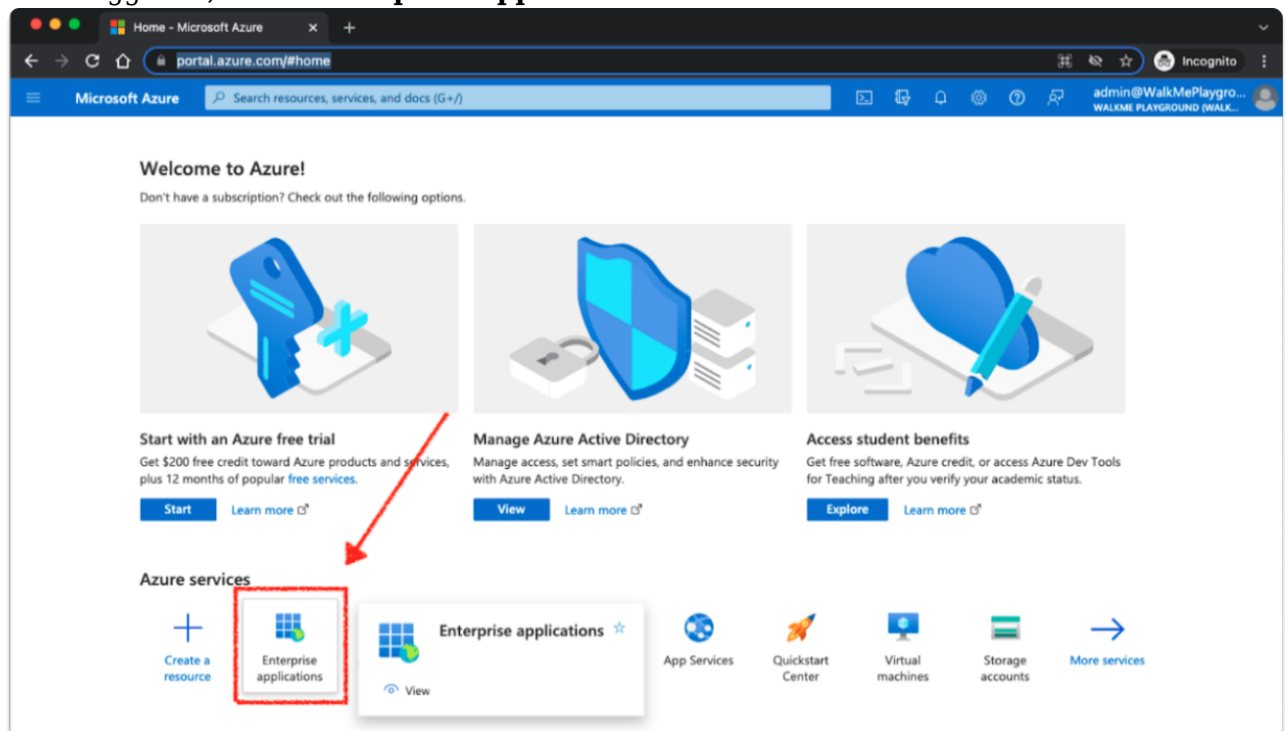
See 3rd-Party Access and Refresh Tokens section above for more information about the storing mechanism.

While searching, the search engine forwards the request, before hitting the Adopter Service, through the Token Injector; a service that injects the relevant tokens to accomplish the request. The local private key is being handed off over the search HTTPS request for runtime decryption.

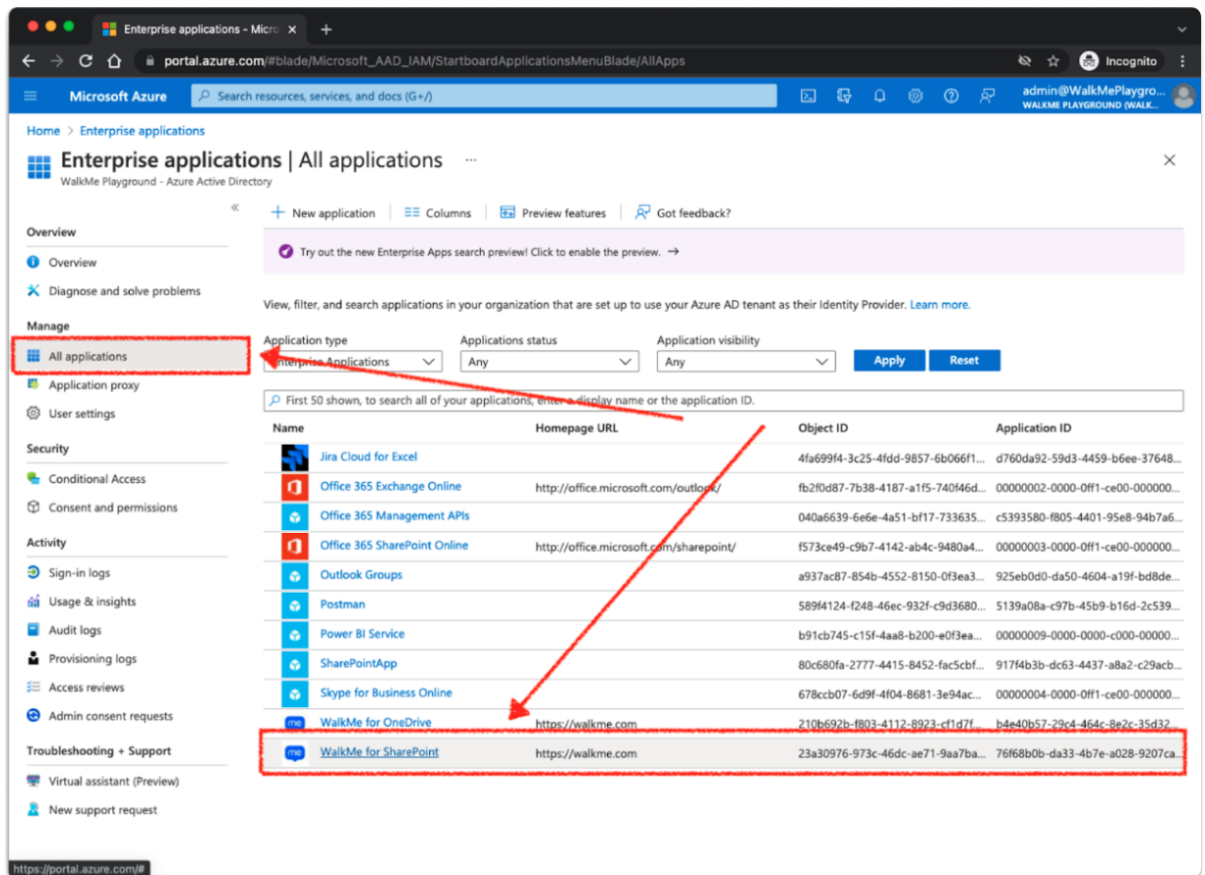


Grant Administration Consent to WalkMe for CRM Dynamics

1. First, make sure that at-least one person connects CRM Dynamics from your organization. Follow the Installing **CRM Dynamics on Workstation** section below to learn more
2. Then, as an Administrator – navigate to [Azure Portal](#) and connect with your Administrator account
3. Once logged in, select **Enterprise Applications**



4. Select **All Applications** and pick **WalkMe for CRM Dynamics**
 1. It will appear the same as WalkMe for SharePoint flow in the images below, but the app name will be "WalkMe for CRM Dynamics"



Enterprise applications | All applications

WalkMe Playground - Azure Active Directory

Overview

Manage

All applications

Application type: Enterprise Applications

Applications status: Any

Application visibility: Any

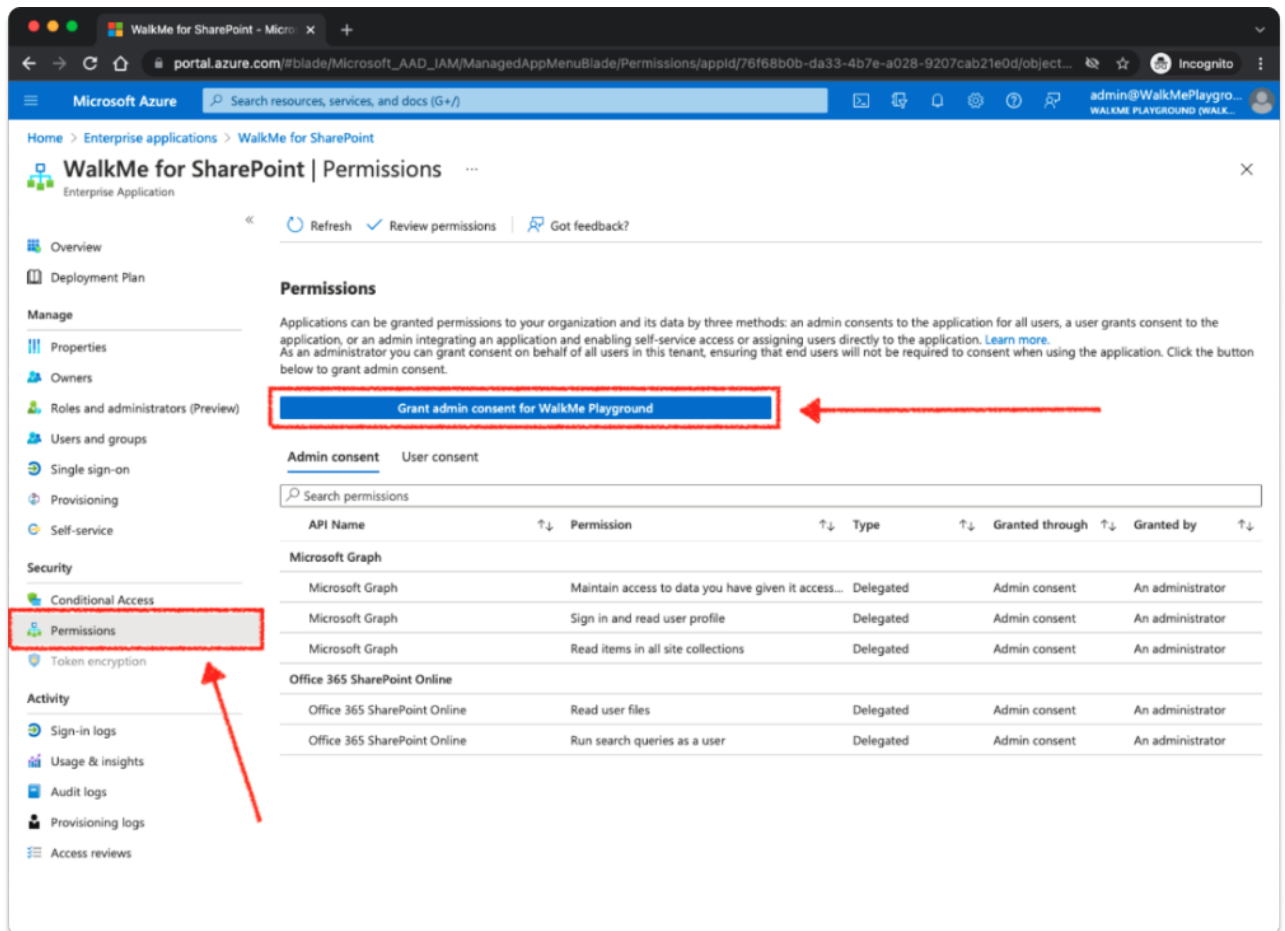
Apply Reset

First 50 shown, to search all of your applications, enter a display name or the application ID.

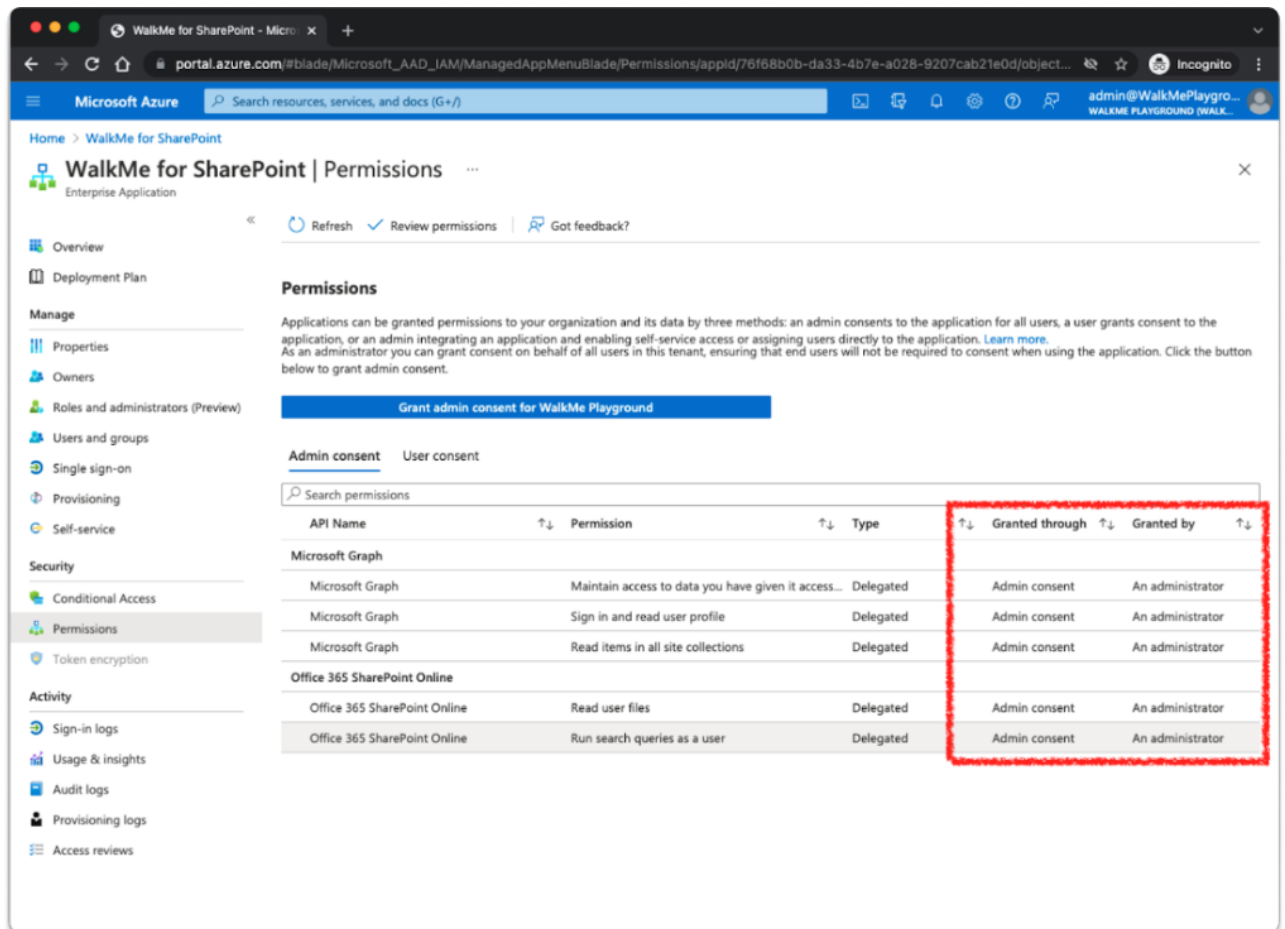
Name	Homepage URL	Object ID	Application ID
Jira Cloud for Excel		4fa699f4-3c25-4fdd-9857-6b066f1...	d760da92-59d3-4459-b6ee-37648...
Office 365 Exchange Online	http://office.microsoft.com/outlook/	fb2f0d87-7b38-4187-a1f5-740f46d...	00000002-0000-0ff1-ce00-000000...
Office 365 Management APIs		040a6639-6e6e-4a51-bf17-733635...	c5393580-4805-4401-95e8-94b7a6...
Office 365 SharePoint Online	http://office.microsoft.com/sharepoint/	f573ce49-c9b7-4142-ab4c-9480a4...	00000003-0000-0ff1-ce00-000000...
Outlook Groups		a937ac87-854b-4552-8150-0f3ea3...	925eb0d0-da50-4604-a19f-bd8de...
Postman		589f4124-f248-46ec-932f-c9d3680...	5139a08a-c97b-45b9-b16d-2c539...
Power BI Service		b91cb745-c15f-4aa8-b200-e0f3ea...	00000009-0000-0000-c000-000000...
SharePointApp		80c680fa-2777-4415-8452-fac5cbf...	917f4b3b-dc63-4437-a8a2-c29acb...
Skype for Business Online		678ccb07-6d9f-4f04-8681-3e94ac...	00000004-0000-0ff1-ce00-000000...
WalkMe for OneDrive	https://walkme.com	210b692b-f803-4112-8923-cf1d7f...	b4e40b57-29c4-464c-8e2c-35d32...
WalkMe for SharePoint	https://walkme.com	23a30976-973c-46dc-ae71-9aa7ba...	76f68b0b-da33-4b7e-a028-9207ca...

5. Select the **Permission** tab

6. Click on **Grant admin consent for {{your organization name}}**



7. Once clicked, a popup should appear (be aware if you have a popup disabler installed)
 1. If you're asked to sign in again, use your Administrator account
8. Click **Accept** on the dialog, confirming organization users to install WalkMe for CRM Dynamics, for personal use
9. Once granted, you'll see a confirmation for each permission on the Application page



WalkMe for SharePoint | Permissions

Enterprise Application

Permissions

Applications can be granted permissions to your organization and its data by three methods: an admin consents to the application for all users, a user grants consent to the application, or an admin integrating an application and enabling self-service access or assigning users directly to the application. [Learn more](#). As an administrator you can grant consent on behalf of all users in this tenant, ensuring that end users will not be required to consent when using the application. Click the button below to grant admin consent.

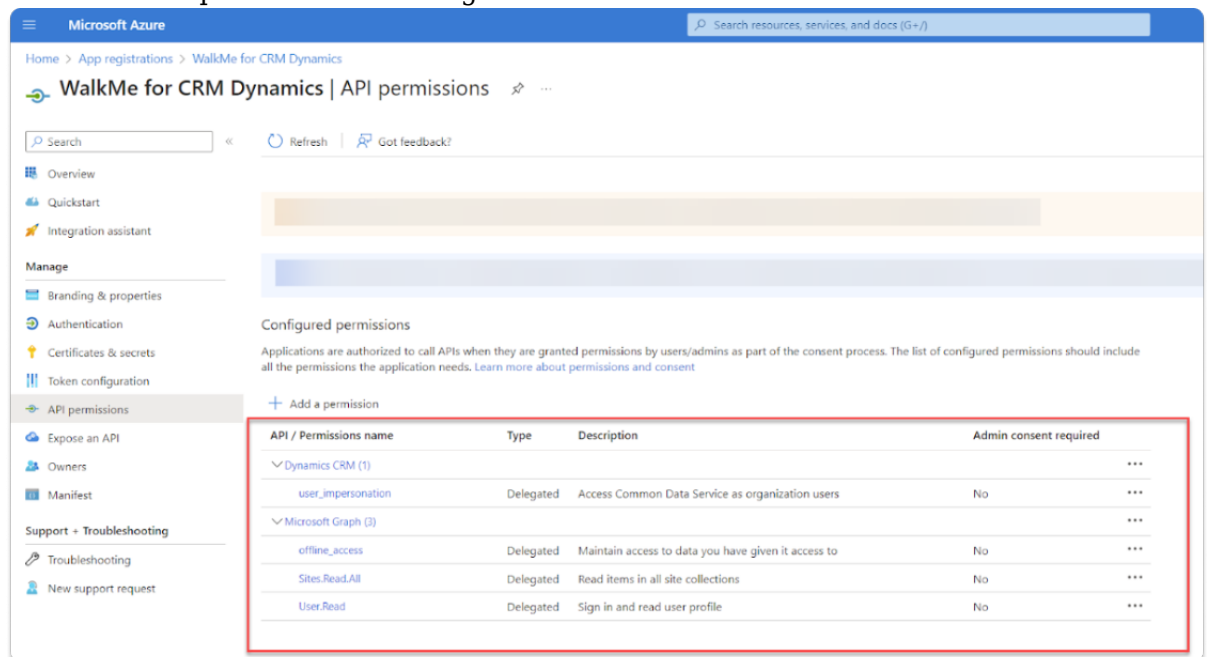
[Grant admin consent for WalkMe Playground](#)

Admin consent | User consent

Search permissions

API Name	Permission	Type	Granted through	Granted by
Microsoft Graph				
Microsoft Graph	Maintain access to data you have given it access...	Delegated	Admin consent	An administrator
Microsoft Graph	Sign in and read user profile	Delegated	Admin consent	An administrator
Microsoft Graph	Read items in all site collections	Delegated	Admin consent	An administrator
Office 365 SharePoint Online				
Office 365 SharePoint Online	Read user files	Delegated	Admin consent	An administrator
Office 365 SharePoint Online	Run search queries as a user	Delegated	Admin consent	An administrator

1. Permission required for CRM integration:



WalkMe for CRM Dynamics | API permissions

Configured permissions

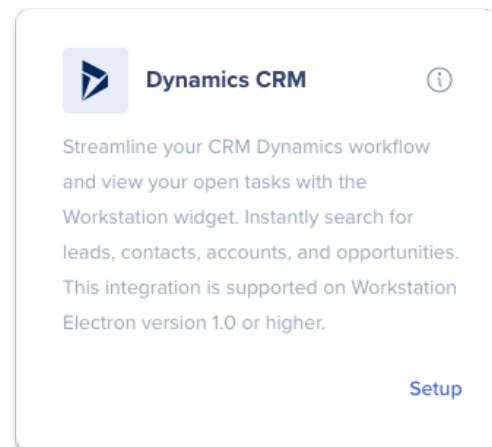
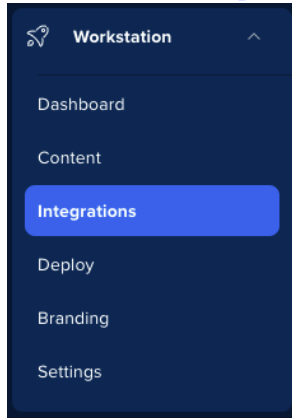
Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

[Add a permission](#)

API / Permissions name	Type	Description	Admin consent required
Dynamics CRM (1)			
user_impersonation	Delegated	Access Common Data Service as organization users	No
Microsoft Graph (3)			
offline_access	Delegated	Maintain access to data you have given it access to	No
Sites.Read.All	Delegated	Read items in all site collections	No
User.Read	Delegated	Sign in and read user profile	No

Connecting CRM Dynamics on Workstation

1. Navigate to the **Workstation Integrations** page in the WalkMe Console:
 1. US Database: <https://console.walkme.com/workstation/integrations>
 2. EU Database: <https://eu-console.walkme.com/workstation/integrations>



2. Find the CRM Dynamics integration and click **Setup**
3. Enter the Sub domain that was assigned to you by CRM Dynamics
How to find your sub domain...

The subdomain is part of the URL, for example: **<https://org31ec4237.crm4.dynamics.com/>**
the sub domain will be **org31ec4237.crm4**

4. Click **Save and Enable**

Configuration Setup

for more information you can read the [Setup Guide](#).

Sub Domains

The sub-domain that was assigned to you by Dynamics CRM

Cancel Save Save And Enable

5. Open Workstation by clicking on the widget (on Windows)/ the WalkMe icon (on the Mac menu bar) or by hitting hitting ctrl/cmd+shift+E
6. Click the **Settings** icon on the bottom-left corner
7. On the Integrations tab, click **Connect** on the CRM Dynamics card

