CFS LAB 1

Install Connected Field Service Add-on

Exercise 3

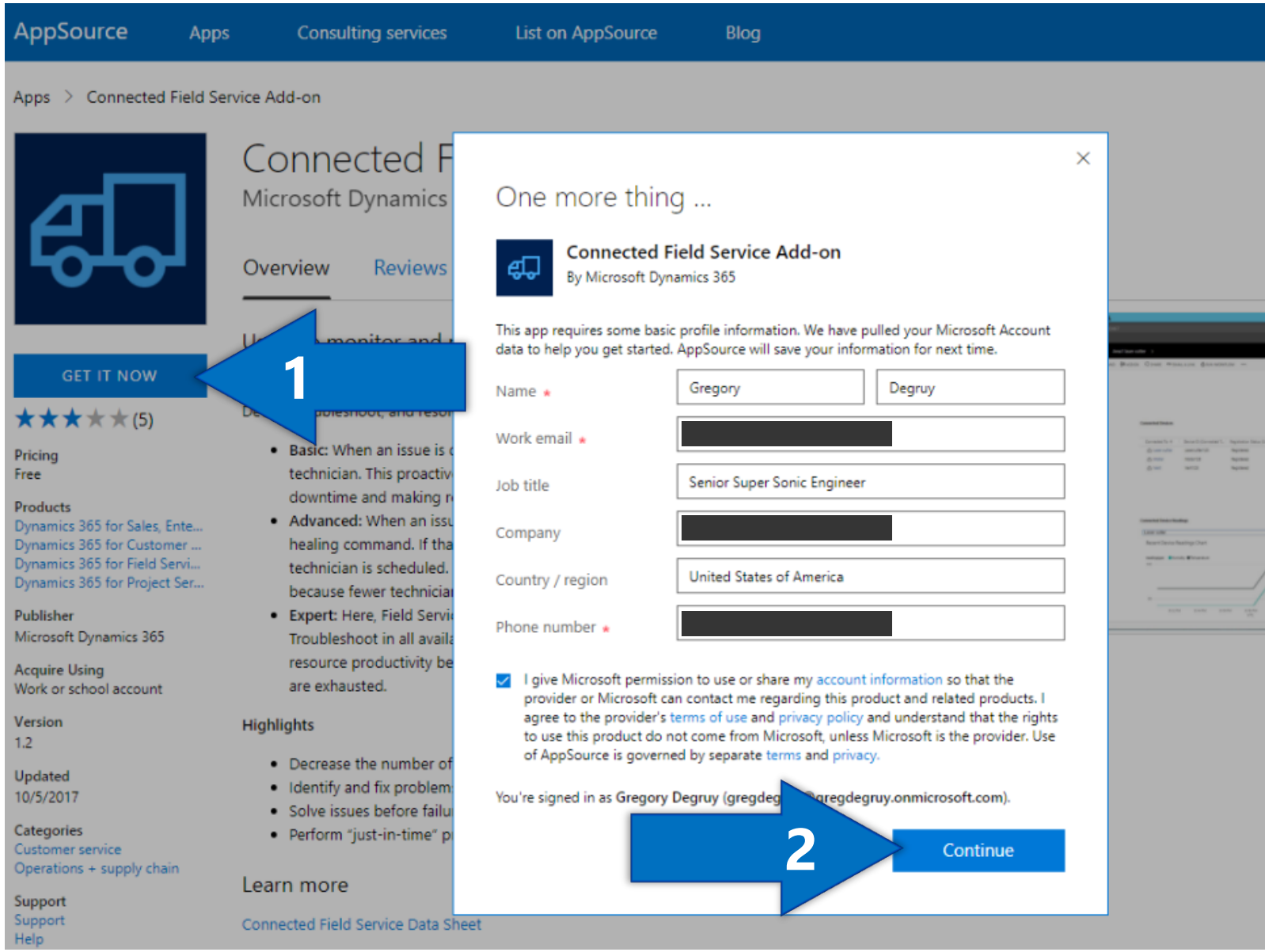
EXERCISE 3

CFS Add-on

On your computer, browse to AppSource https://appsource.microsoft.com/en-us/product/dynamics-365/mscrm.58666c7d-65ee-452d-8708-70b4d471d4c0

`1` Install the "Connected Field Service Add-On" by clicking `GET IN NOW`. Make sure to complete the form with valid company information and your User ID / email created in Exercise 1.

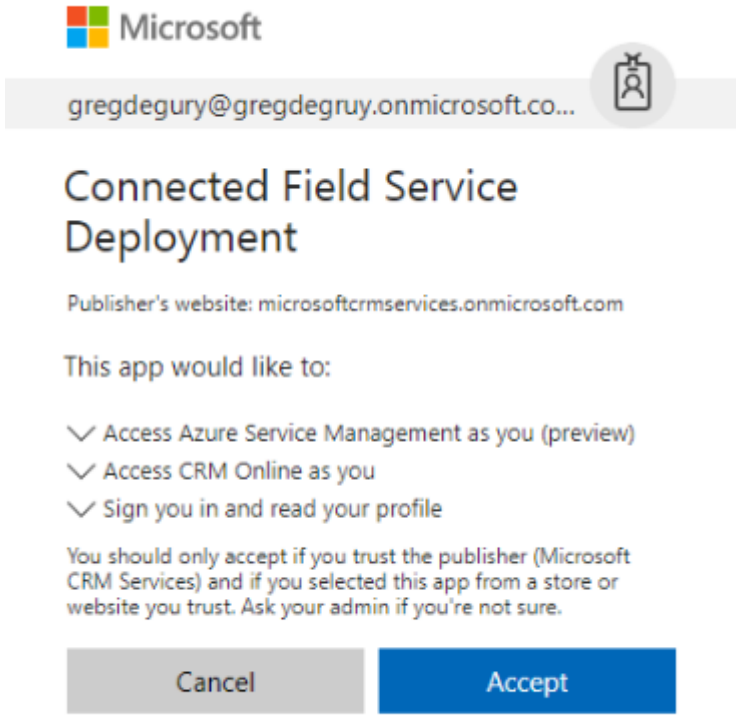
`2` Click `Continue`



EXERCISE 3

App permissions

You should now see a prompt notifying you that you are being taken to Dynamics 365 to complete the process and to choose a consent option for app permissions.



EXERCISE 3

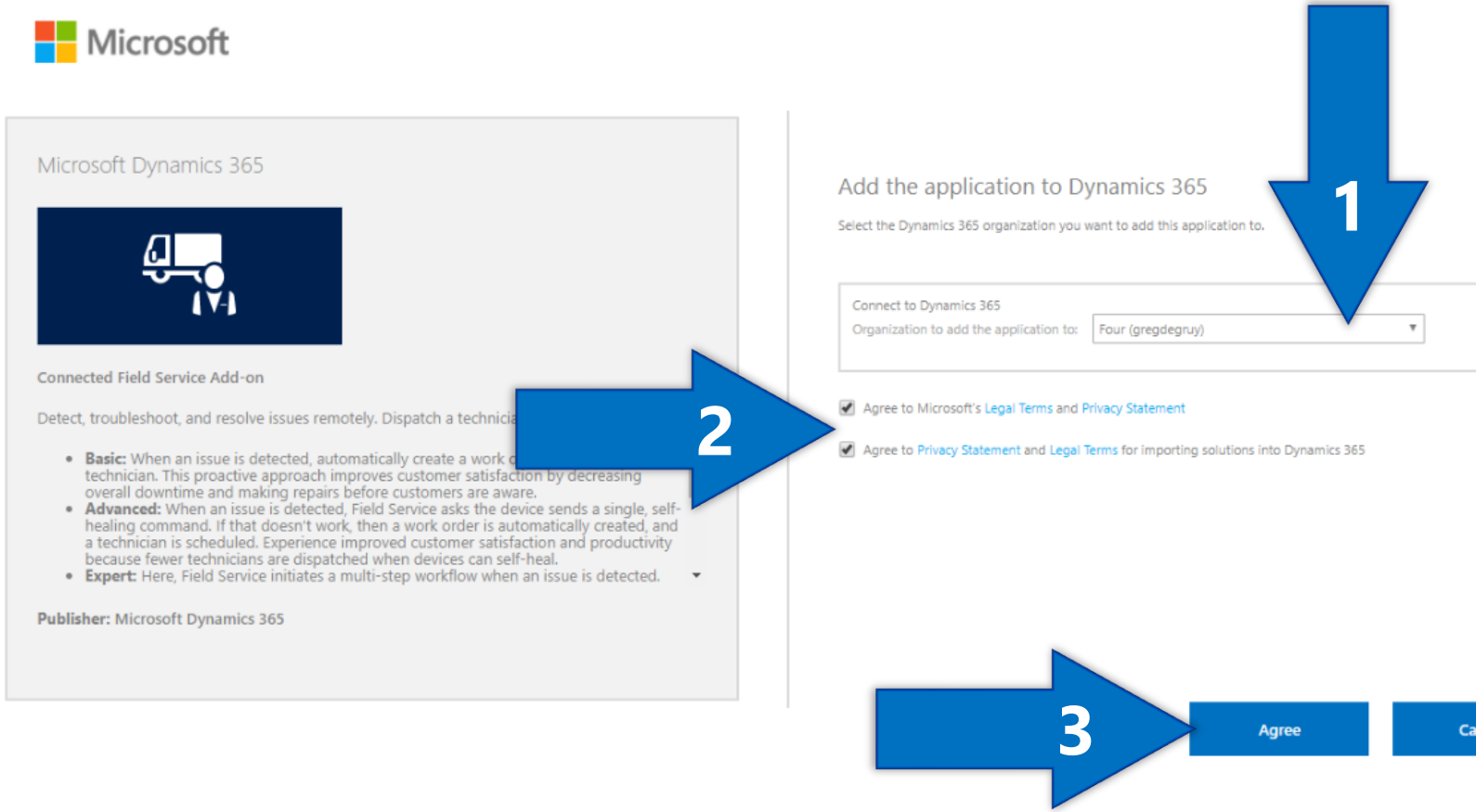
Dynamics org

The first step in configuring your Connected Field Service environment is choosing the Dynamics 365 organization you want to install the Connected Field Service Add-On too.

- `1` Your Dynamics 365 organization is auto selected for you

- `2` Check off the two boxes if you agree to the terms of use

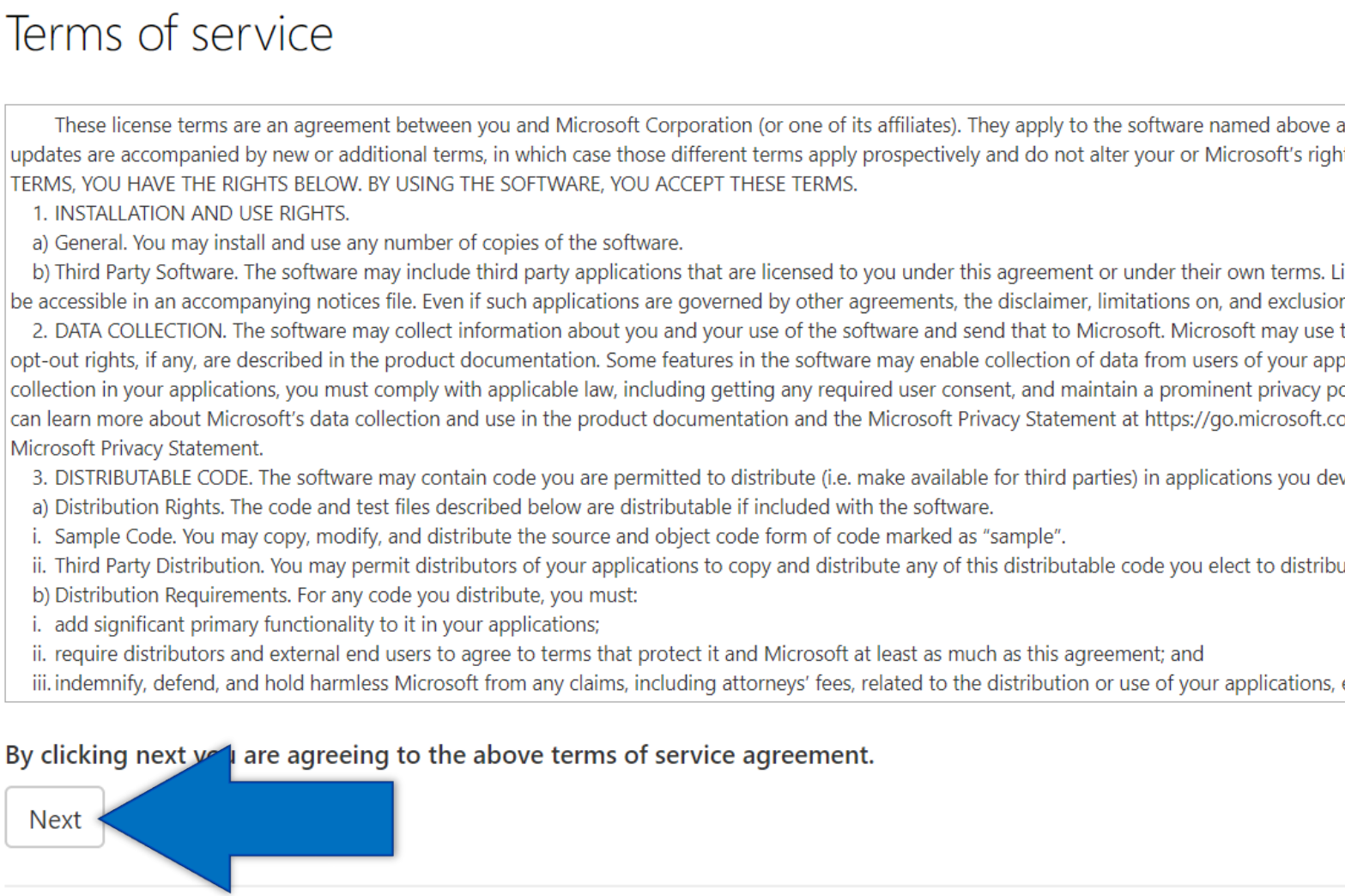
- `3` Click the `Agree` button



EXERCISE 3

Service terms

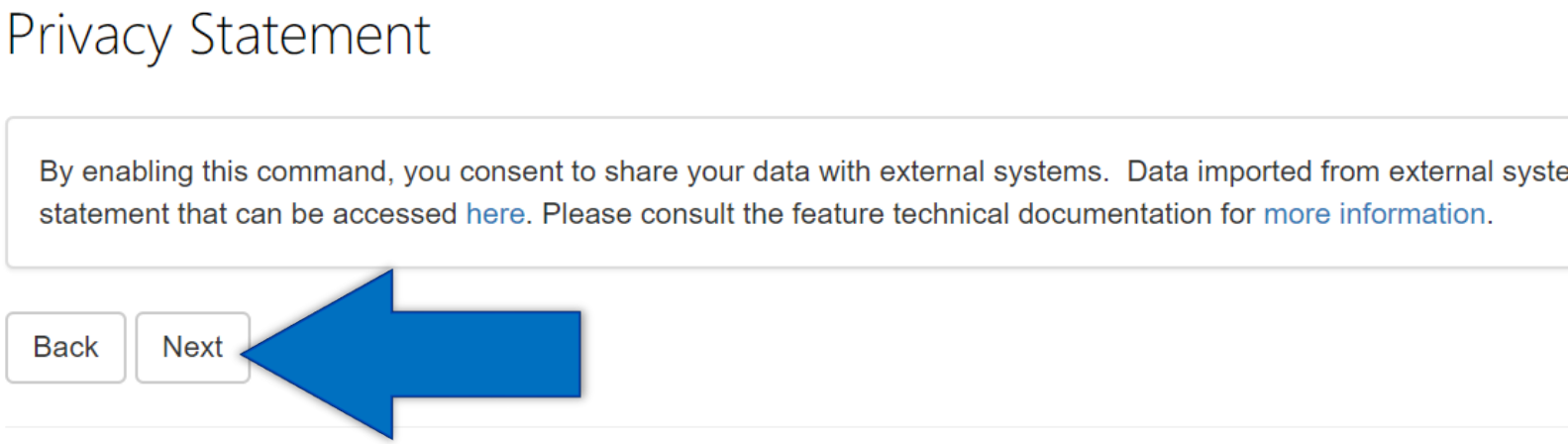
Read over the Terms of service. Click `Next` when you're ready.



EXERCISE 3

Privacy statement

Read over the Privacy statement. Click `Next` when you're ready.



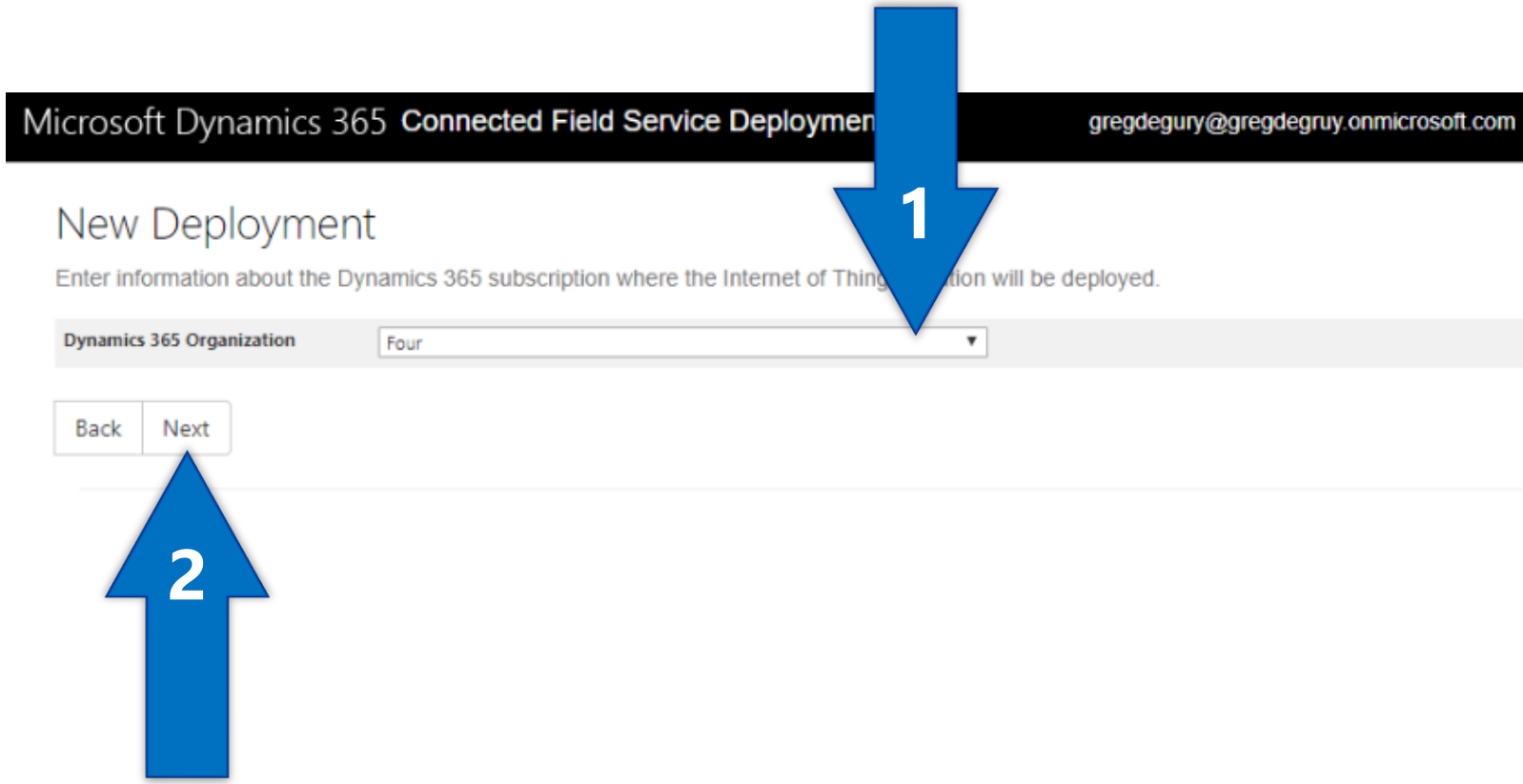
EXERCISE 3

Deployment org

Verify the Dynamics 365 subscription where the Internet of Things solution will be deployed is selected properly.

- `1` Your Dynamics 365 organization is auto selected for you and there should only be since we created only one instance in Exercise 1

- `2 Click the `Next` button

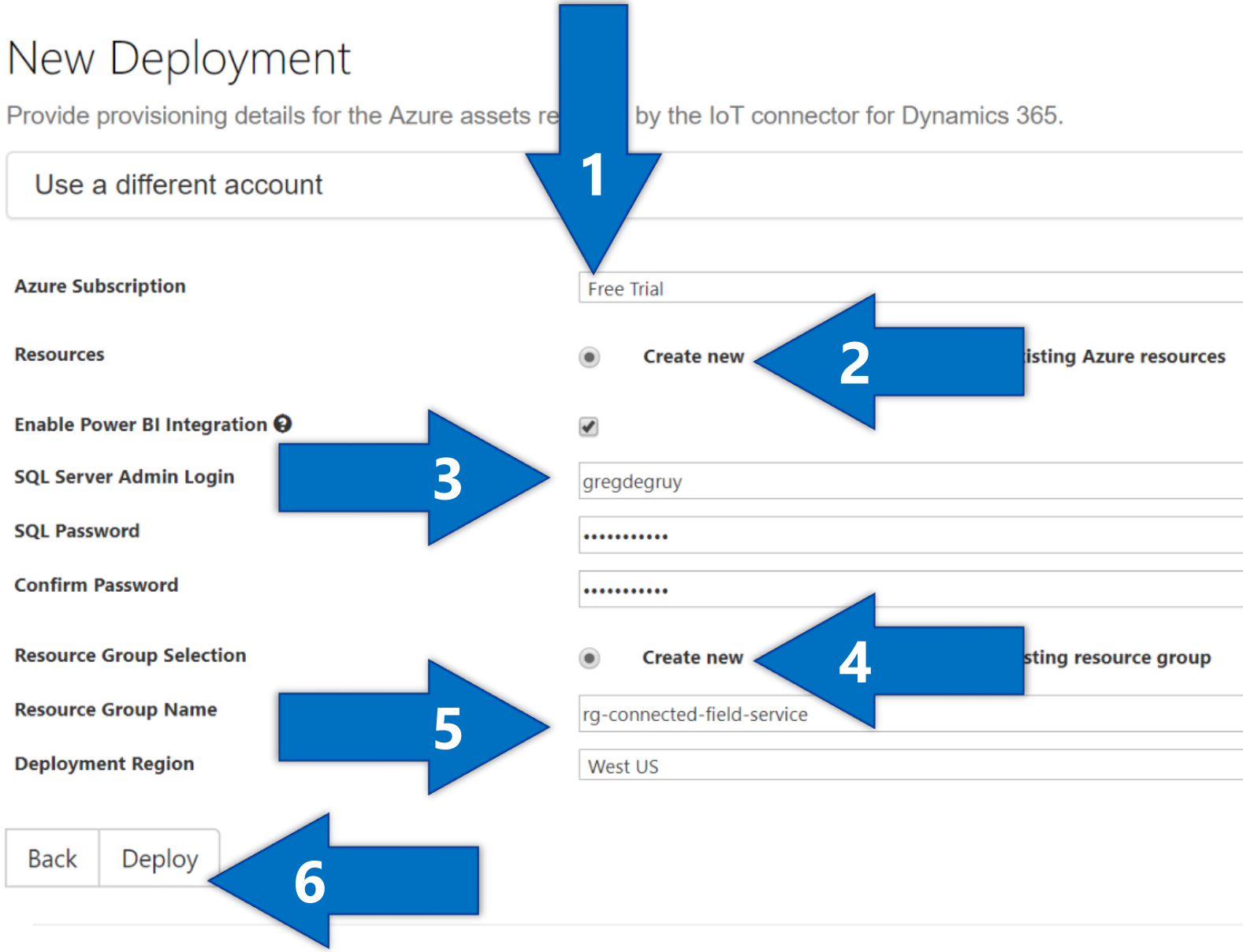


EXERCISE 3

Azure service information

Let's setup the Azure IoT services for your Dynamics organization.

- `1` Your Azure Trial is auto selected for you and should say "Free Trial", this came from the work we did in Exercise 2.
- `2` Choose `Create new` for our Resources
- `3` Check Enable Power BI Integration and add data storage information. In my case I choose "gregdegruy" as my SQL Server Admin Login.
- `4` Choose `Create new` for our Resource Group Selection
- `5` Give your Resource Group a name and deployment region, in my case I called it "rg-connected-field-service" and choose "West US".
- `6` Click Deploy



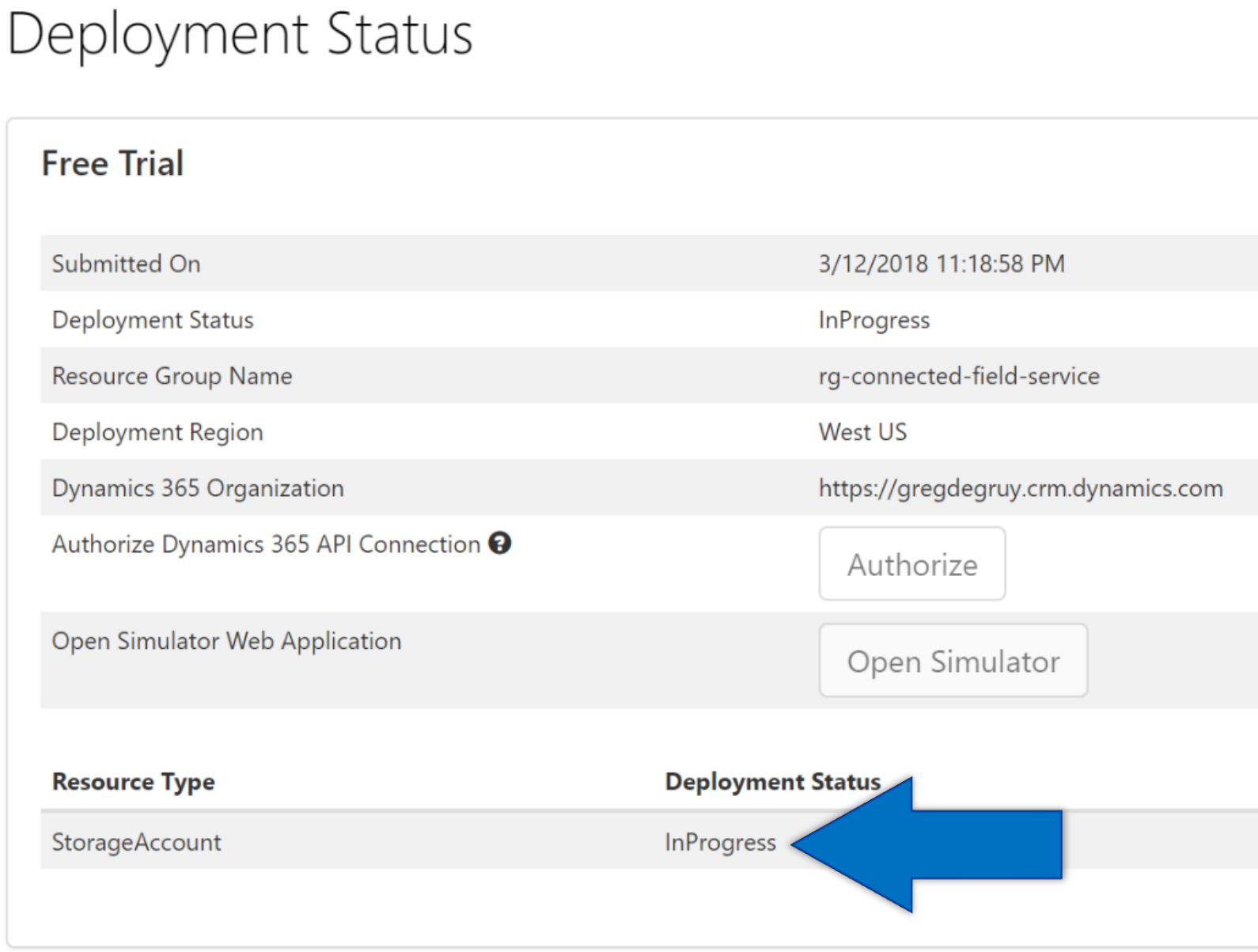
EXERCISE 3

Azure service deployment

Your Azure IoT services for your Dynamics organization are now automatically deploying for you!

Starting with your Azure StorageAccount that currently has a InProgress Deployment Status, but will soon show success and so will the other services that will slowly appear under Resource Type.

This deployment will take around 25 minutes to complete.



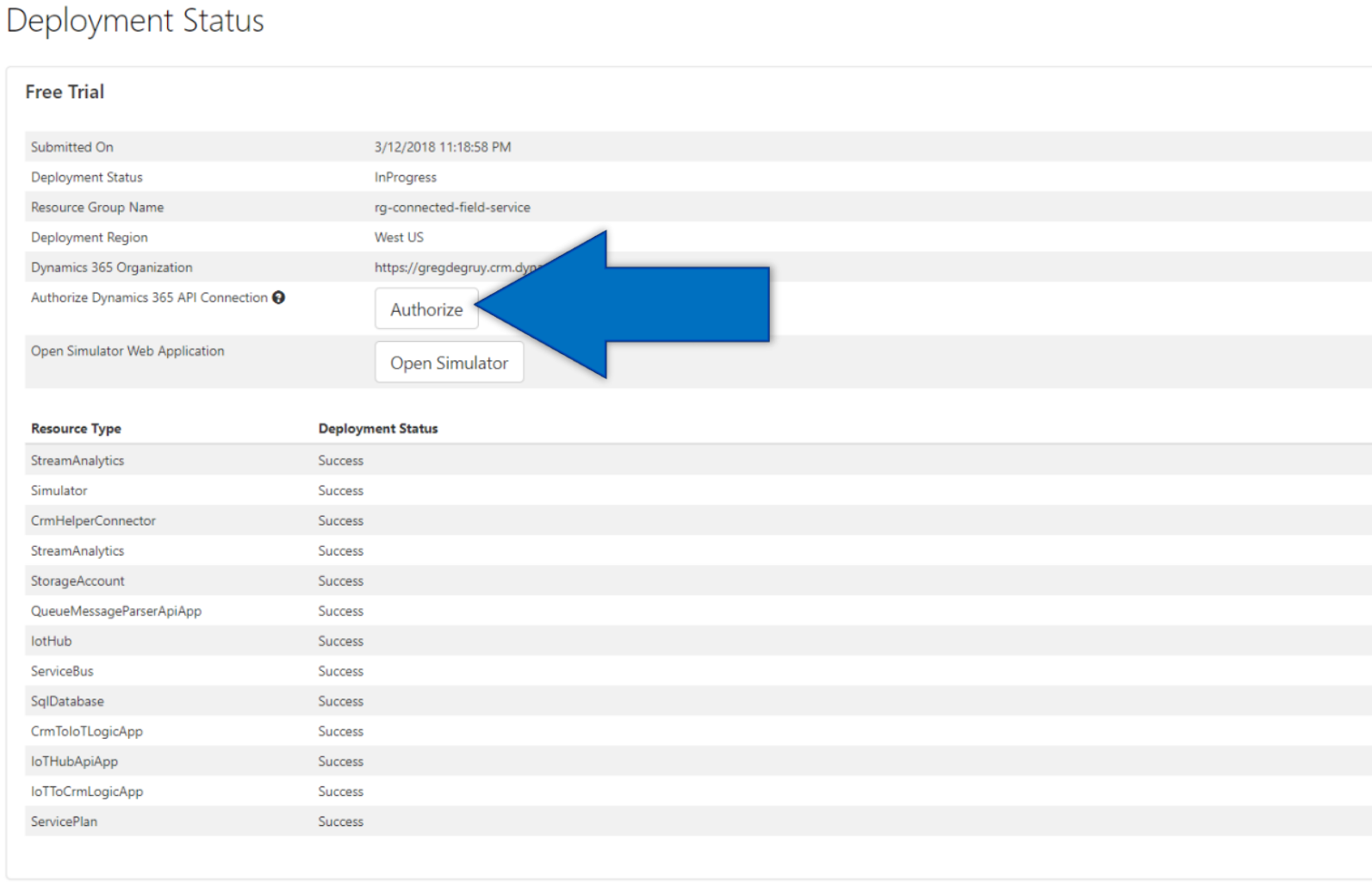
EXERCISE 3

Authorize Dynamics

Once deployment is completed, you'll notice all services will have a Success Deployment Status.

You should now be able to click the Authorize button that will take you to your Azure Portal where we will complete our setup.

Click the `Authorize` button.



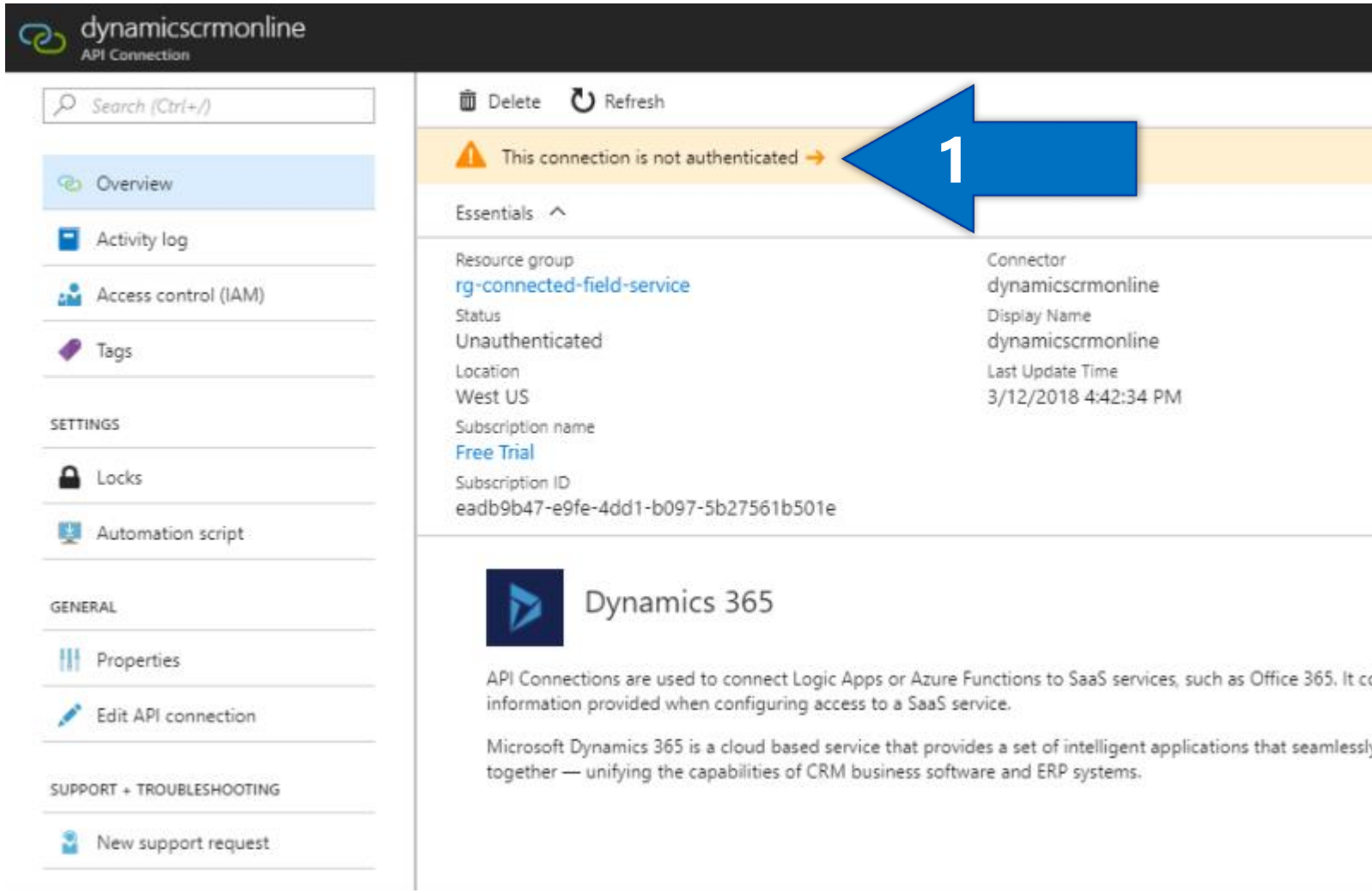
EXERCISE 3

Dynamics API connection

The first windows you'll see in your Azure portal is for the dynamicscrmonline API Connection service.

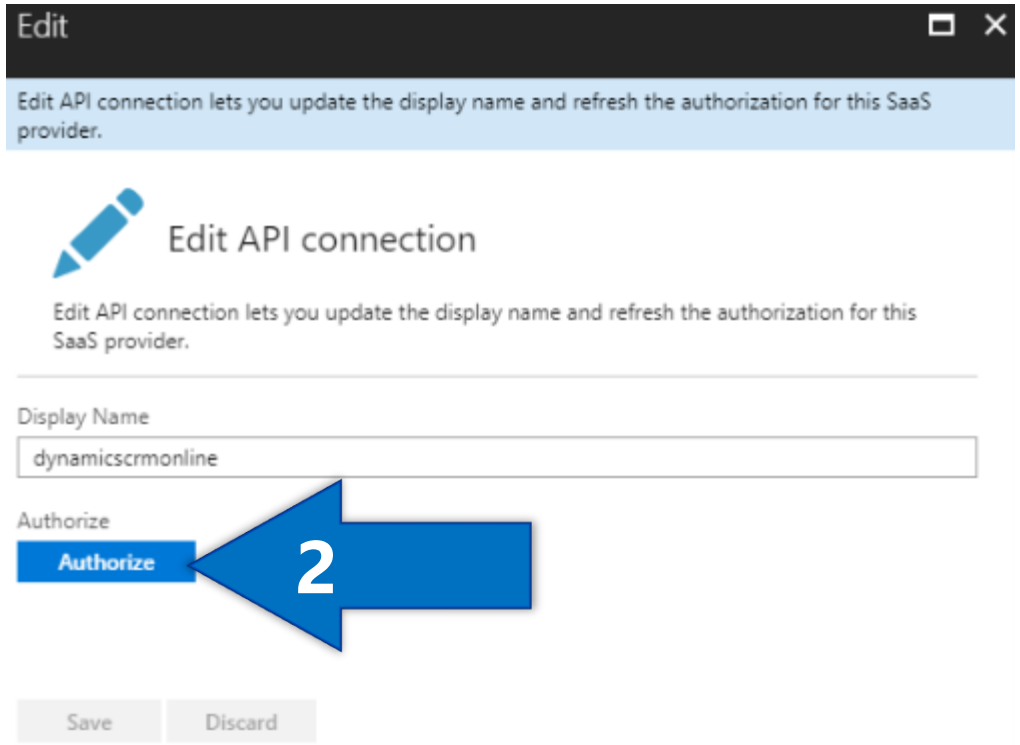
We need to authorize this API Connection service to connect to our Dynamics organization.

- `1` Click "This connection is not authenticated" highlighted in yellow.



Edit API connection

`2` Give your connection a Display Name and click `Authorize`

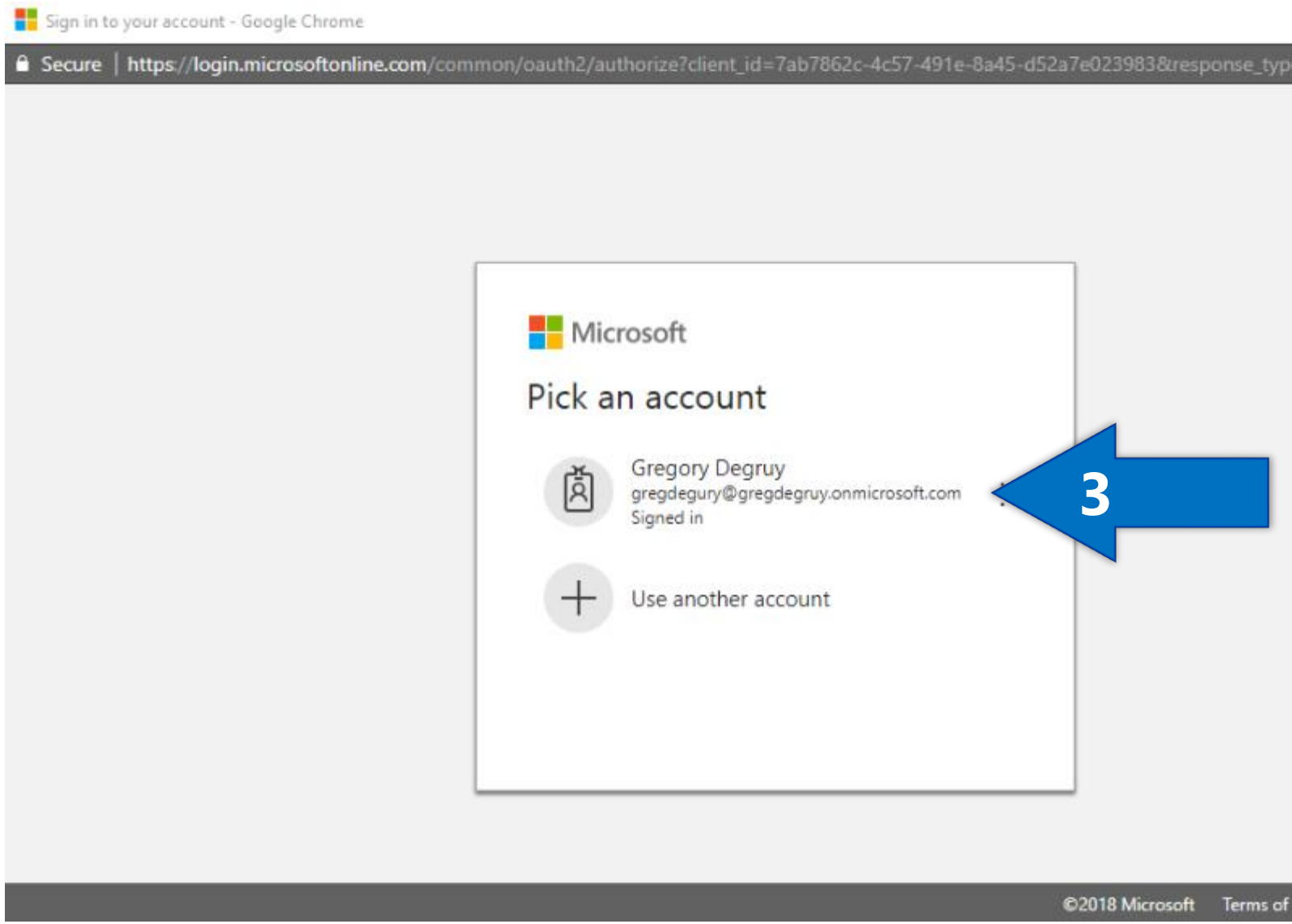


EXERCISE 3

Dynamics User ID

`3` A Window will open for you to pick your Microsoft account login.

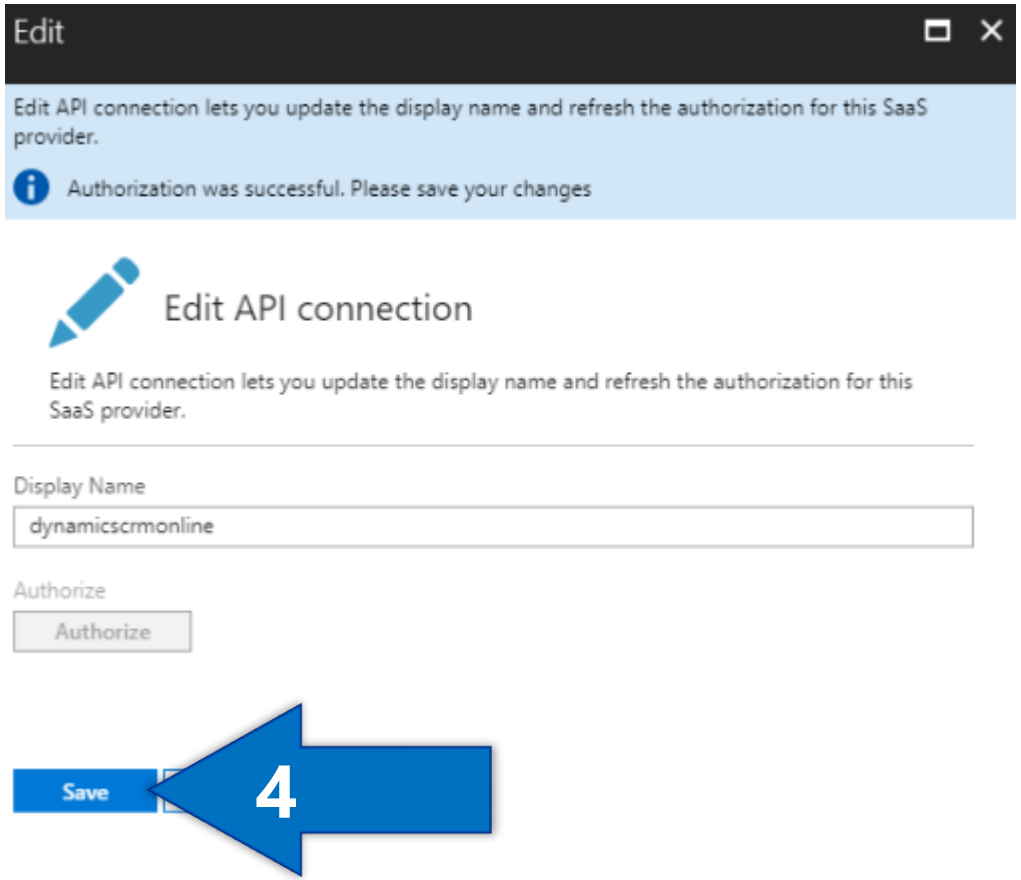
We created this login in Exercise 1, only one login should be shown show so select it.



EXERCISE 3

Save API connection

`4` The window will close and you'll now have the option to save your API connection information, click `Save`.



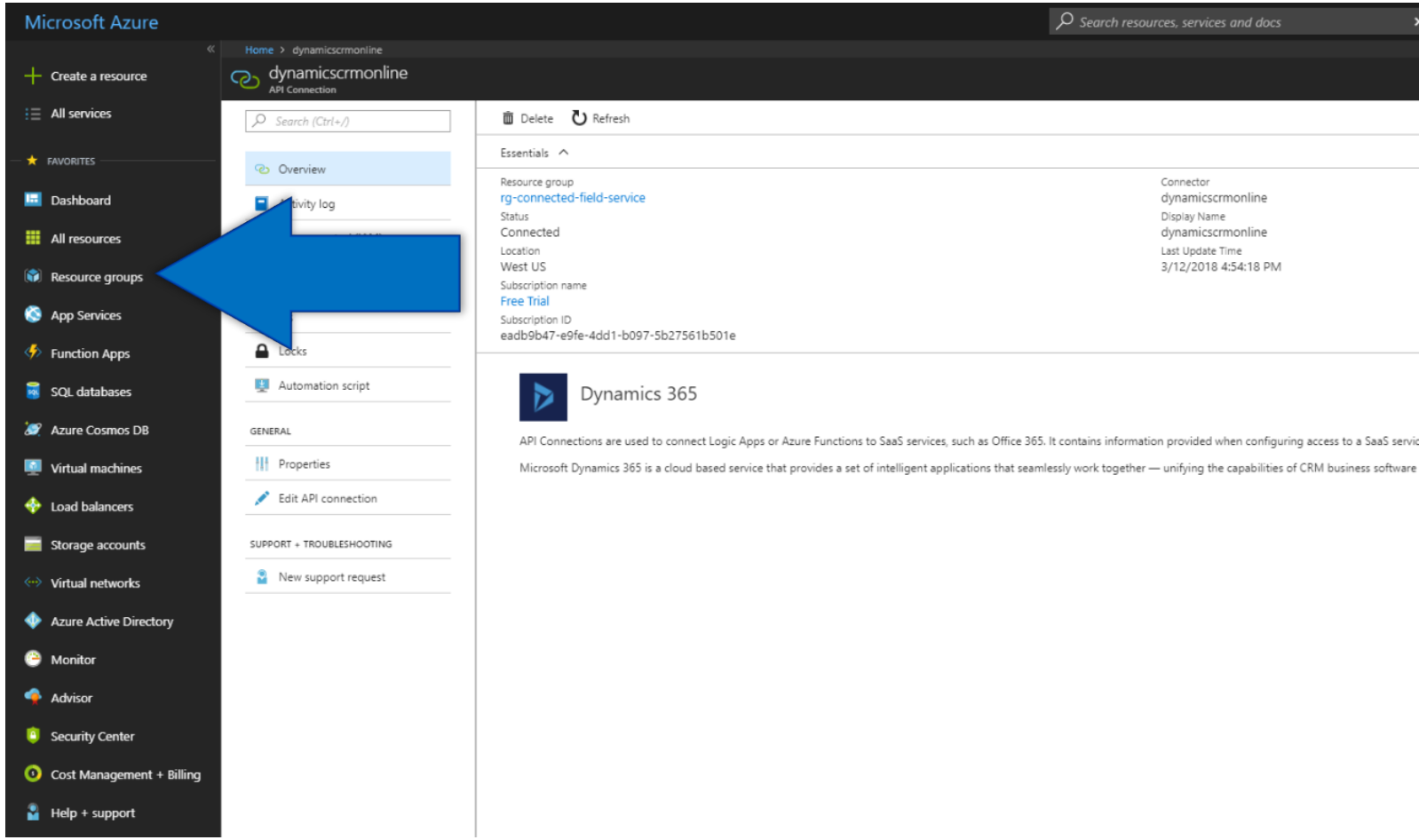
EXERCISE 3

Resource group menu

Now that we have an authorized API connection between Azure and Dynamics, we can start configuring our IoT Hub.

This IoT Hub serves as our management service for the IoT device(s) in our Connected Field Service solution.

Click on `Resource Groups` from the left menu.

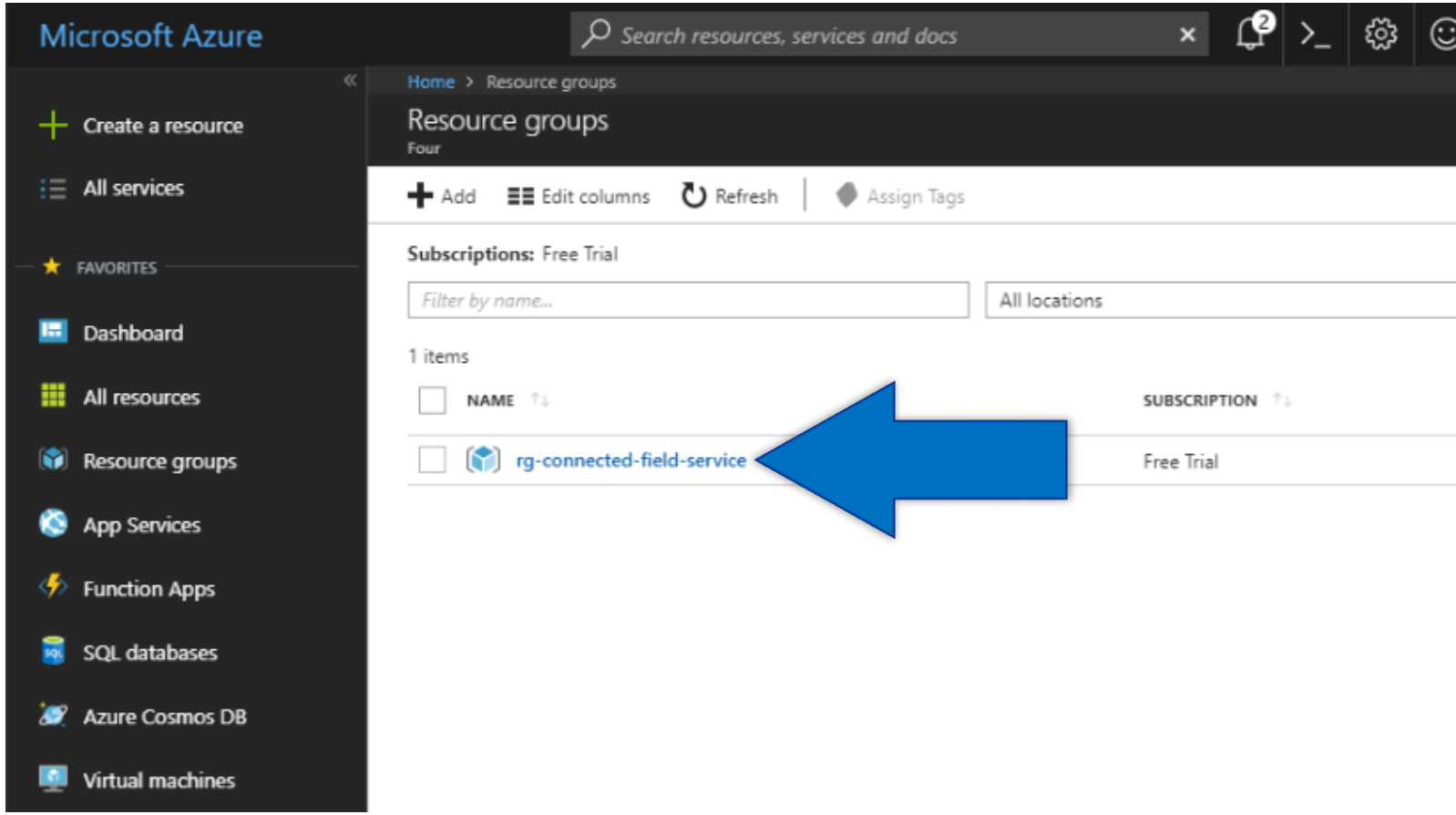


EXERCISE 3

CFS resource group

This will bring you to the resource group selection list. We created this resource group int eh 25 minute deployment at the start of this exercise and contains all of the IoT services we'll be using.

Click on `rg-connected-field-service`.

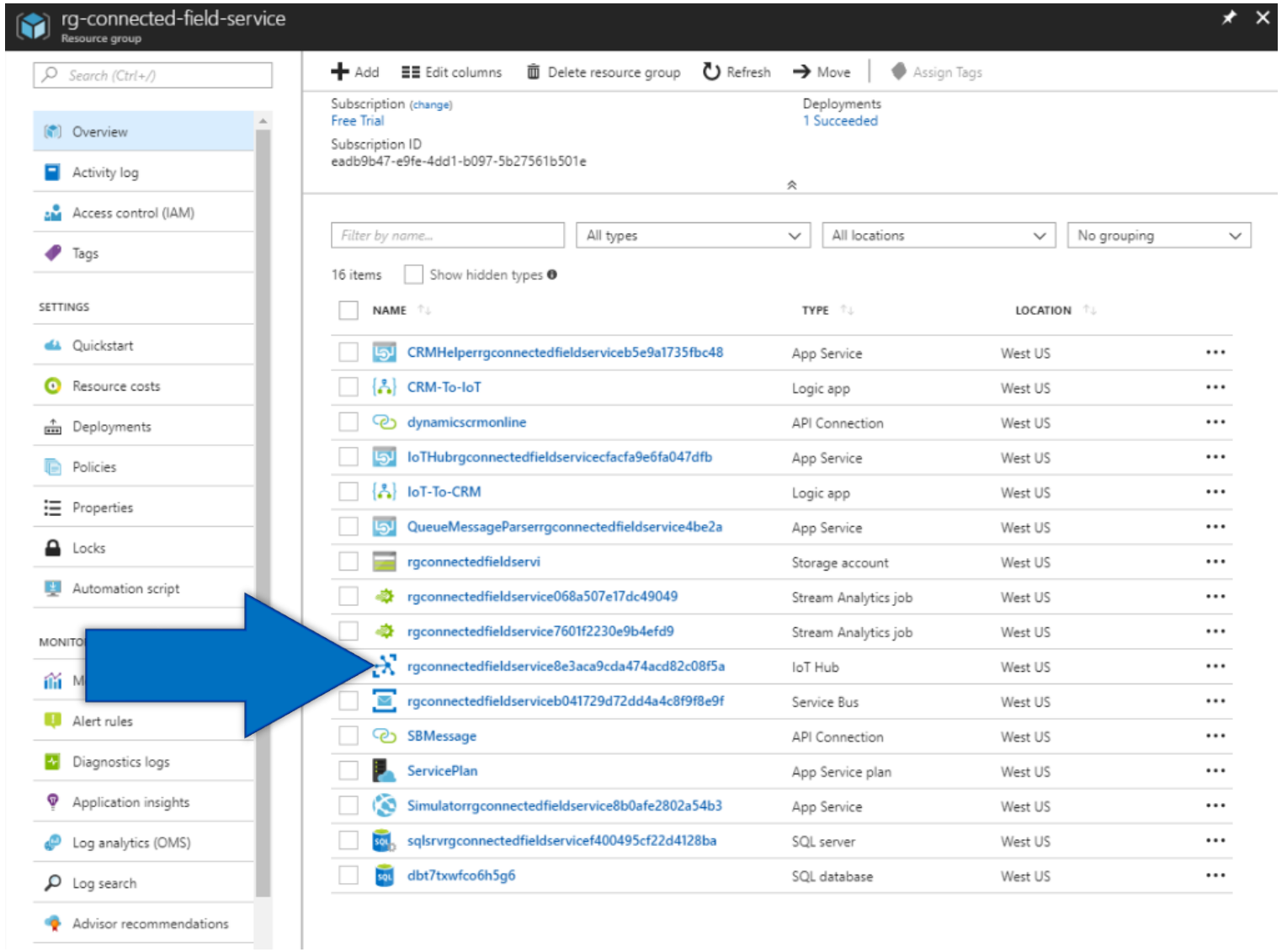


EXERCISE 3

IoT services

This resource group contains all of the Azure services we deployed from AppSource solution.

Click on your IoT Hub. It is named the same as your Resource Group with a long list of letters and numbers in the form of a GUID, in my case it's called `rgconnectedfieldservice8e3aca9cda474acd82c08f5a`.



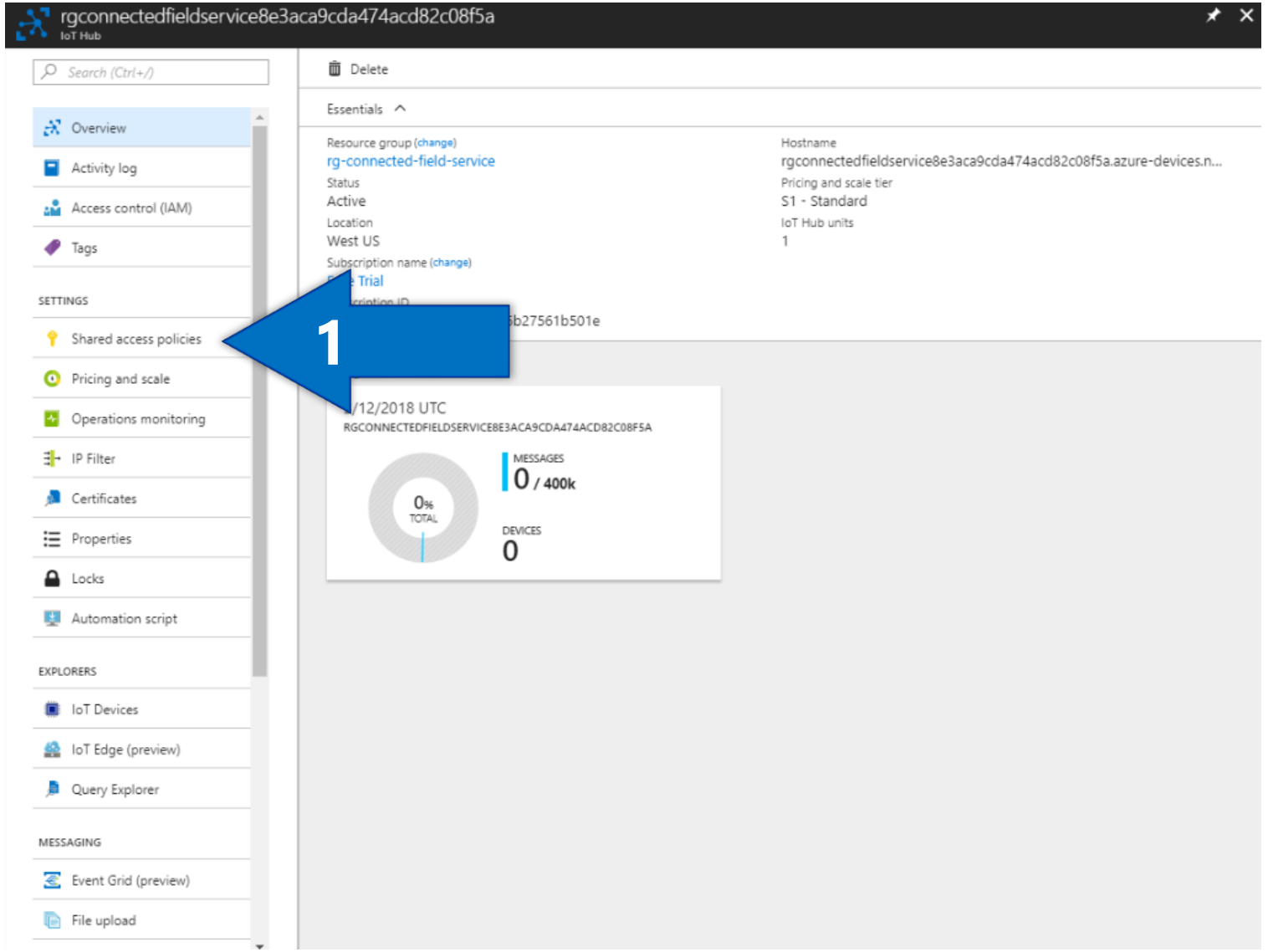
EXERCISE 3

IoT Hub

Shared access policy

Now we need to add a Shared access policy to create a connection between our IoT Hub and Dynamics.

- `1` Click "Shared access policy" from the IoT Hub menu.

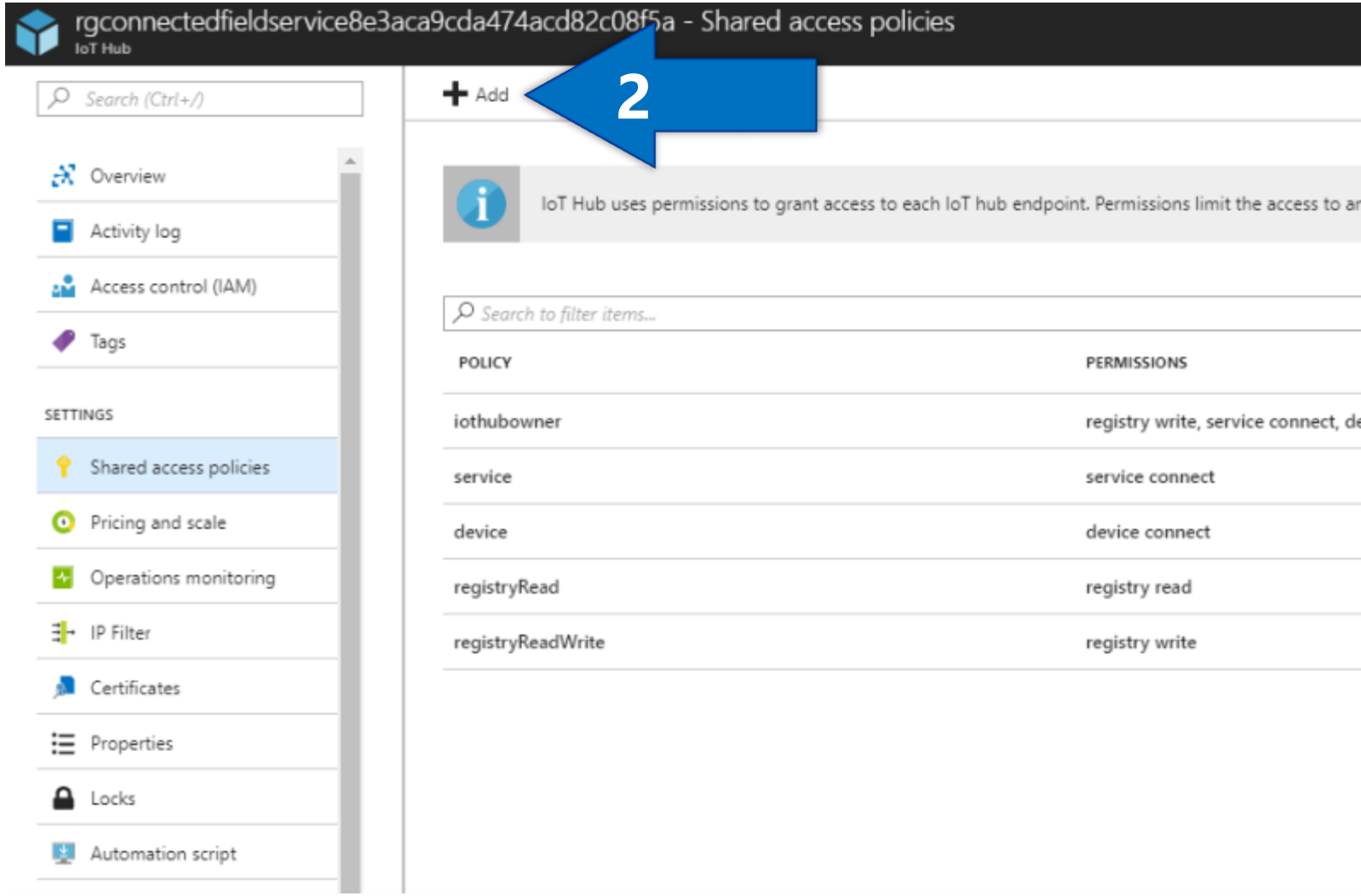


EXERCISE 3

Add

Shared access policy

- `2` Click "+ Add" at the very top of the Shares access policy list.



EXERCISE 3

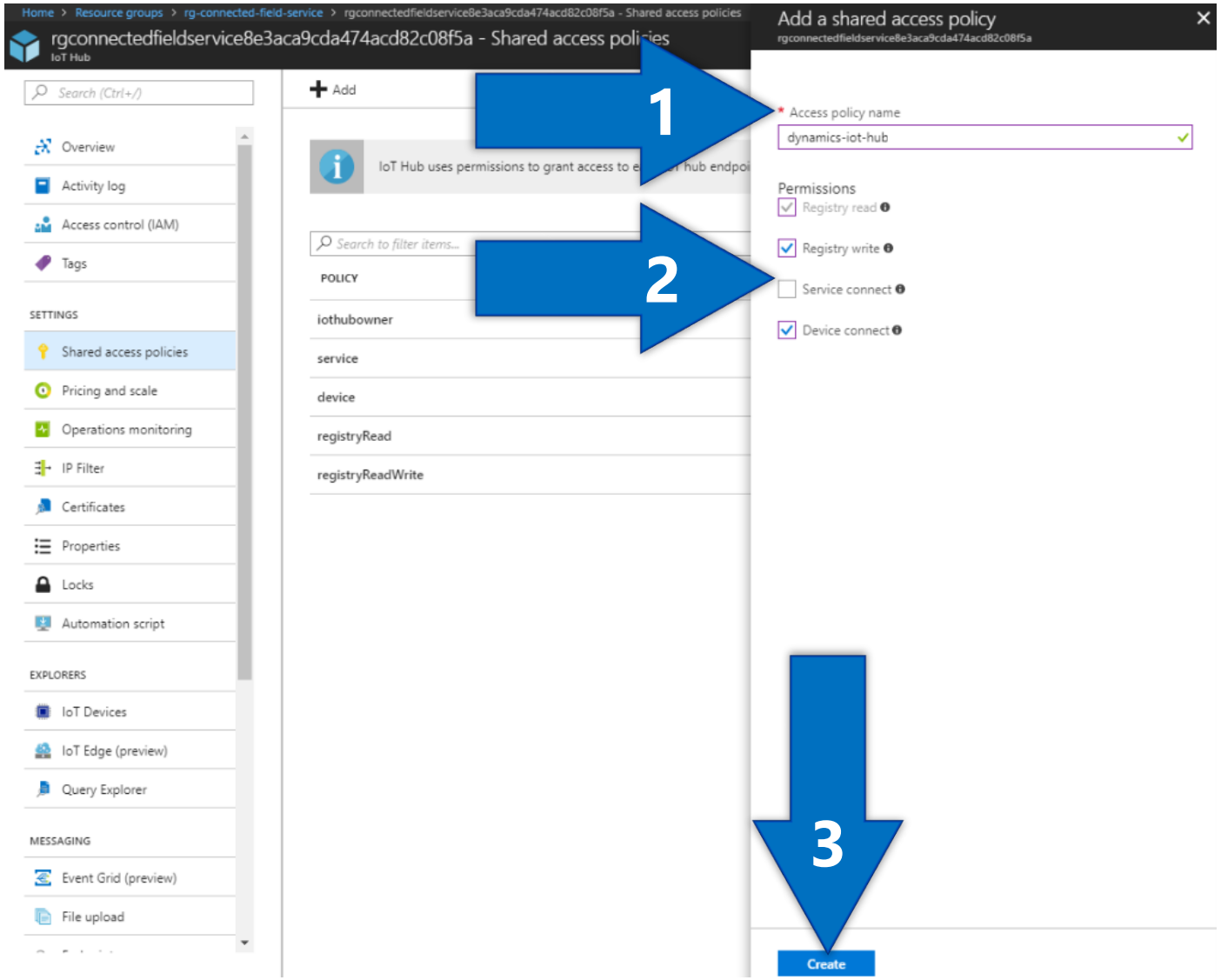
Shared access policy permissions

Then give the Shared access policy the permissions it needs to communicate with Dynamics:

- `1` Give your policy a name, I called mine dynamics-iot-hub

- `2` Select the `Registry read`, `Registry write`, and `Device connect` permissions

- `3` Click the `Create` button

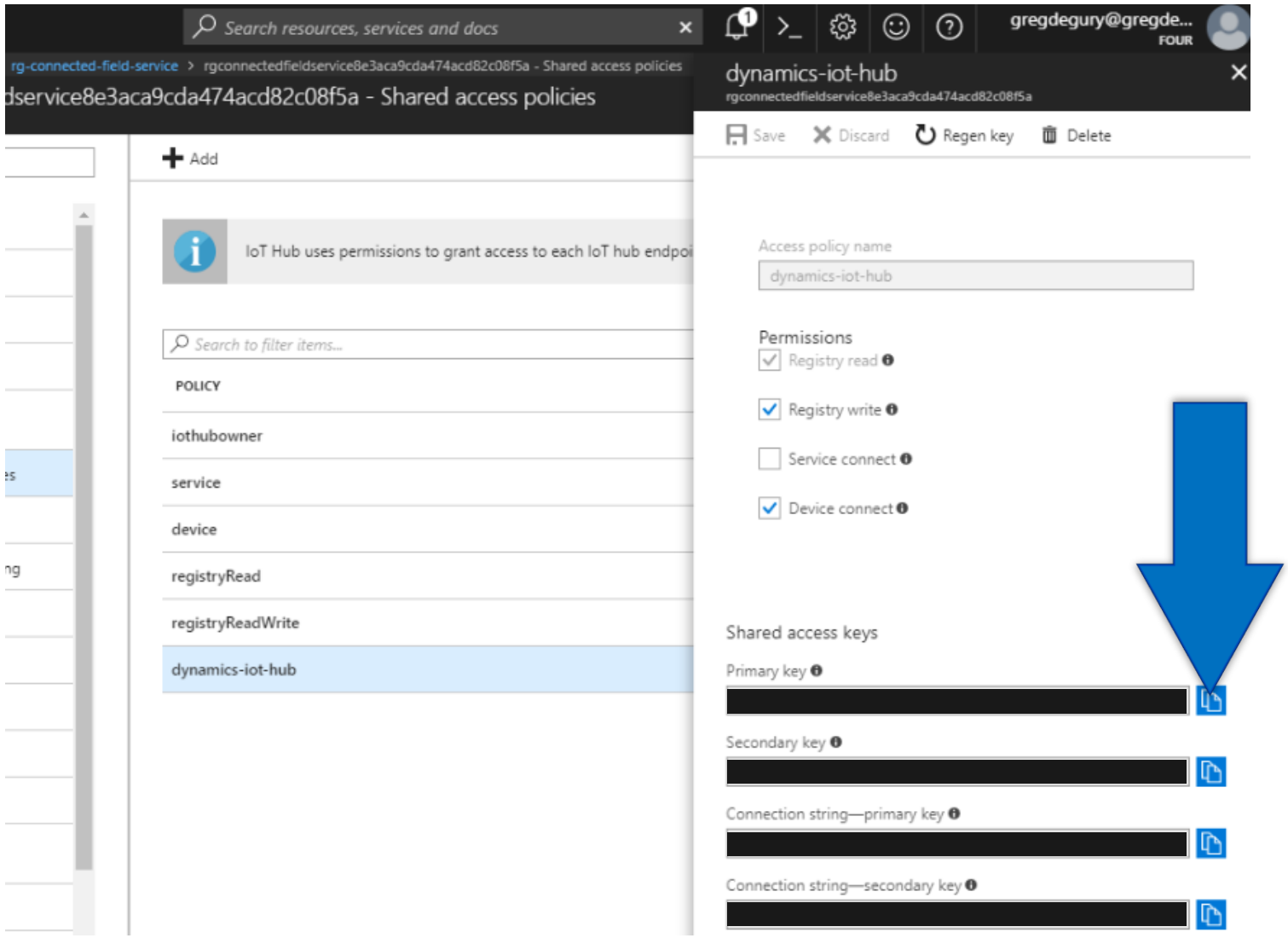


EXERCISE 3

Shared access policy keys

Once created, the shared access policy will provide 4 keys to you.

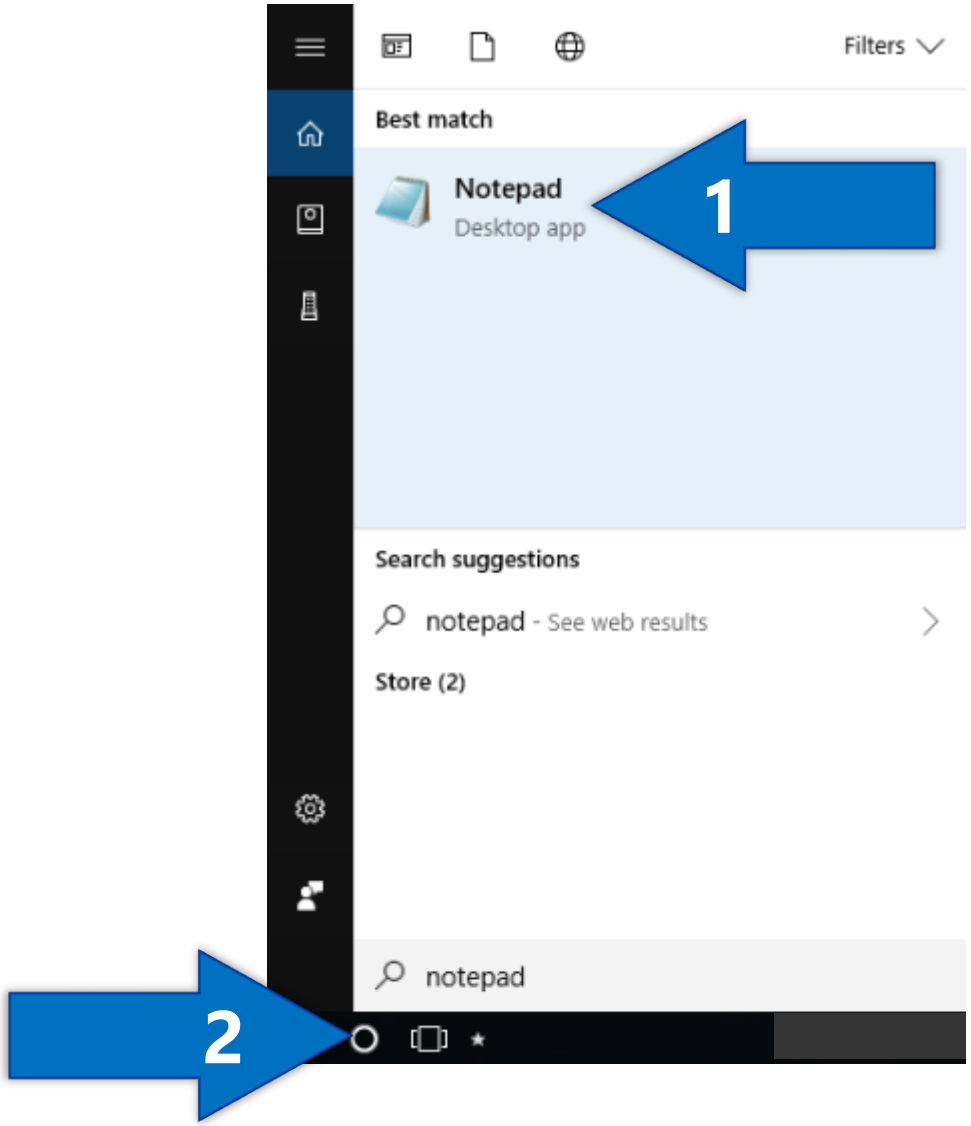
The one we will need going forward is the `Primary Key`, click the copy button for the primary key and save it in Notepad.



EXERCISE 3

Notepad

Notepad can be open by clicking the `1` Cortana button next to the Windows icon and typing in Notepad. It will be the first app on the list that you can then `2` click on.

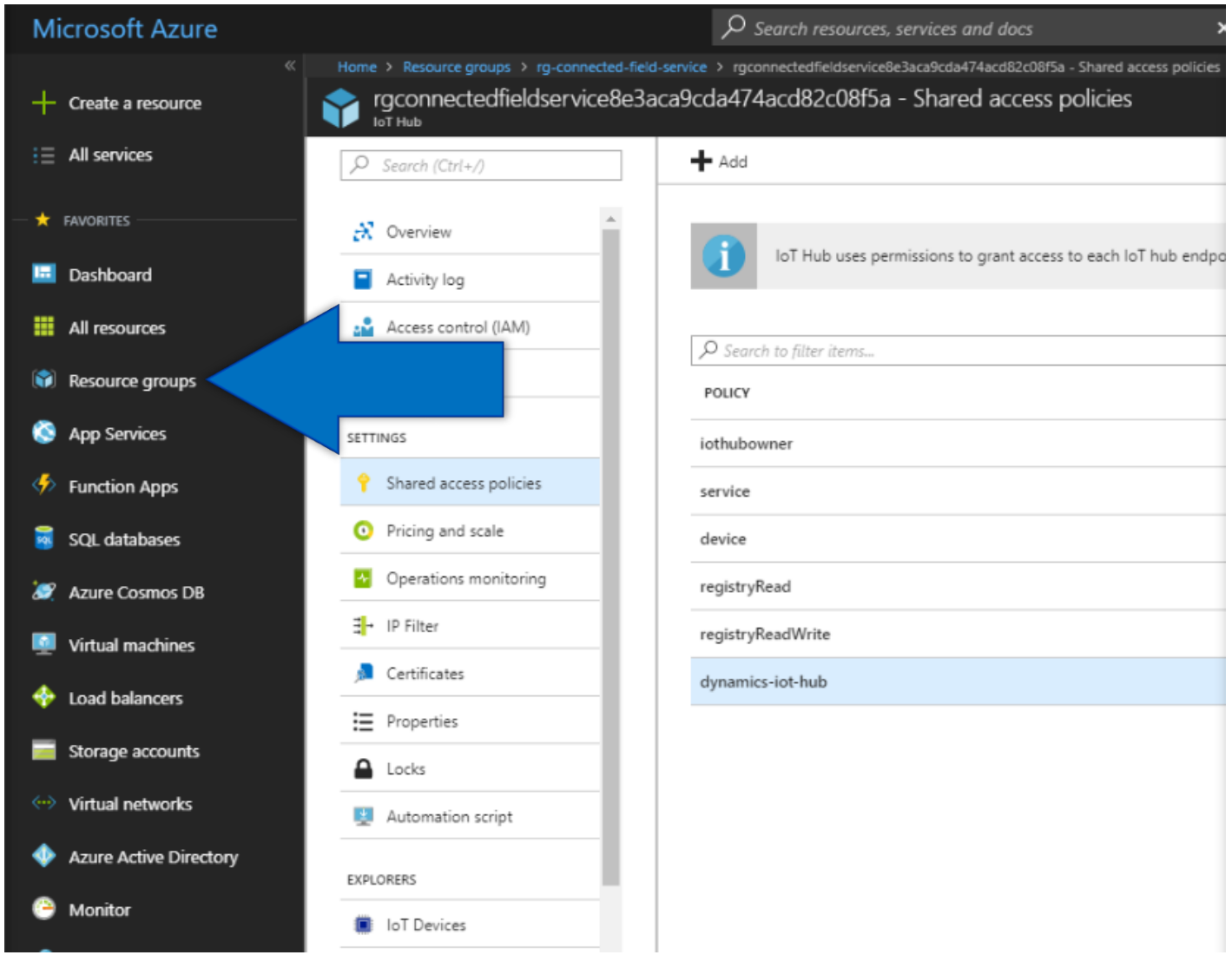


EXERCISE 3

Back to resource group

Now that we have our Primary key saved, we can head to our device simulator.

This simulator is a web app that we can use to see real time IoT device telemetry. Click on `Resource Groups` from the left menu.



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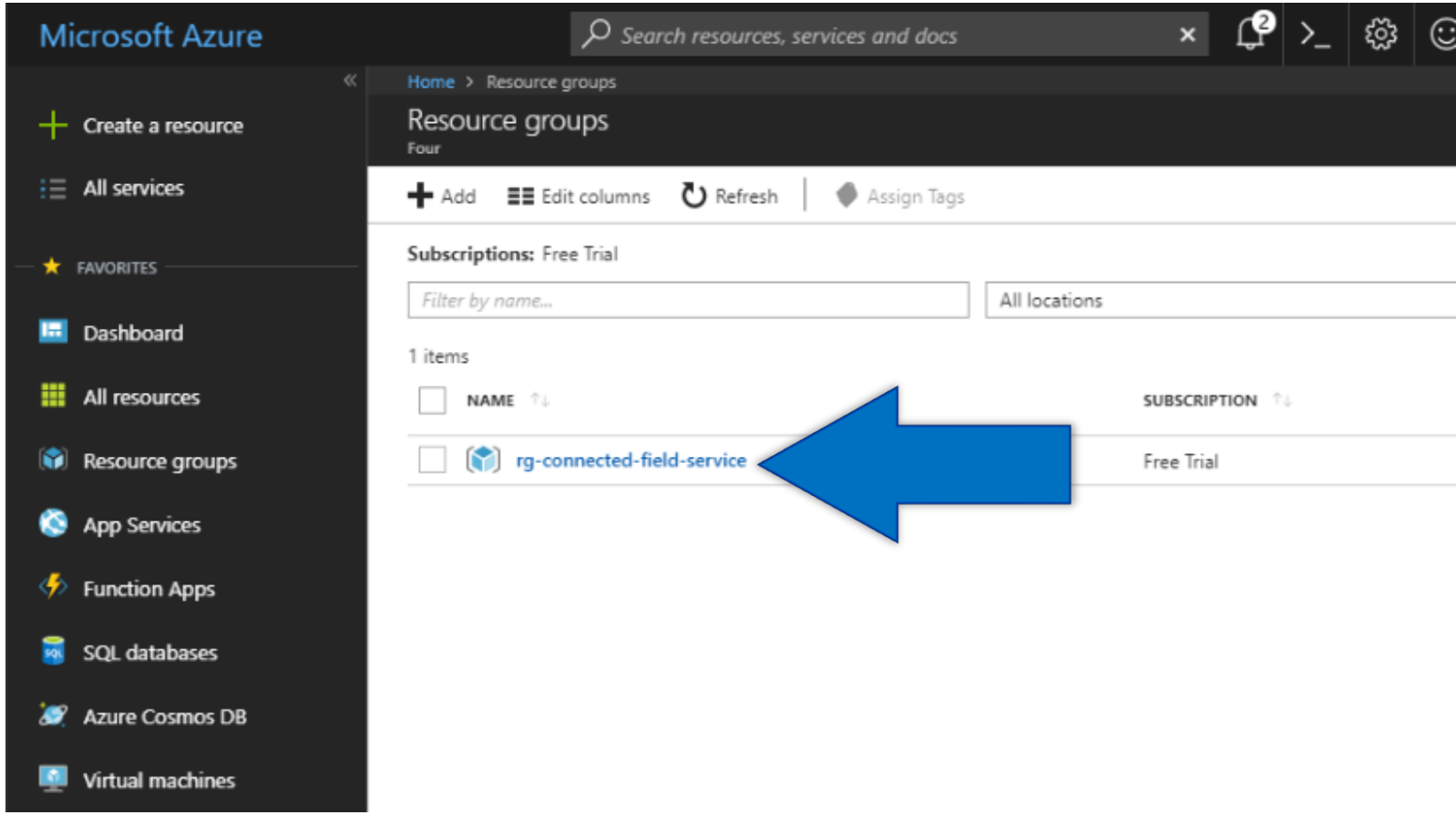
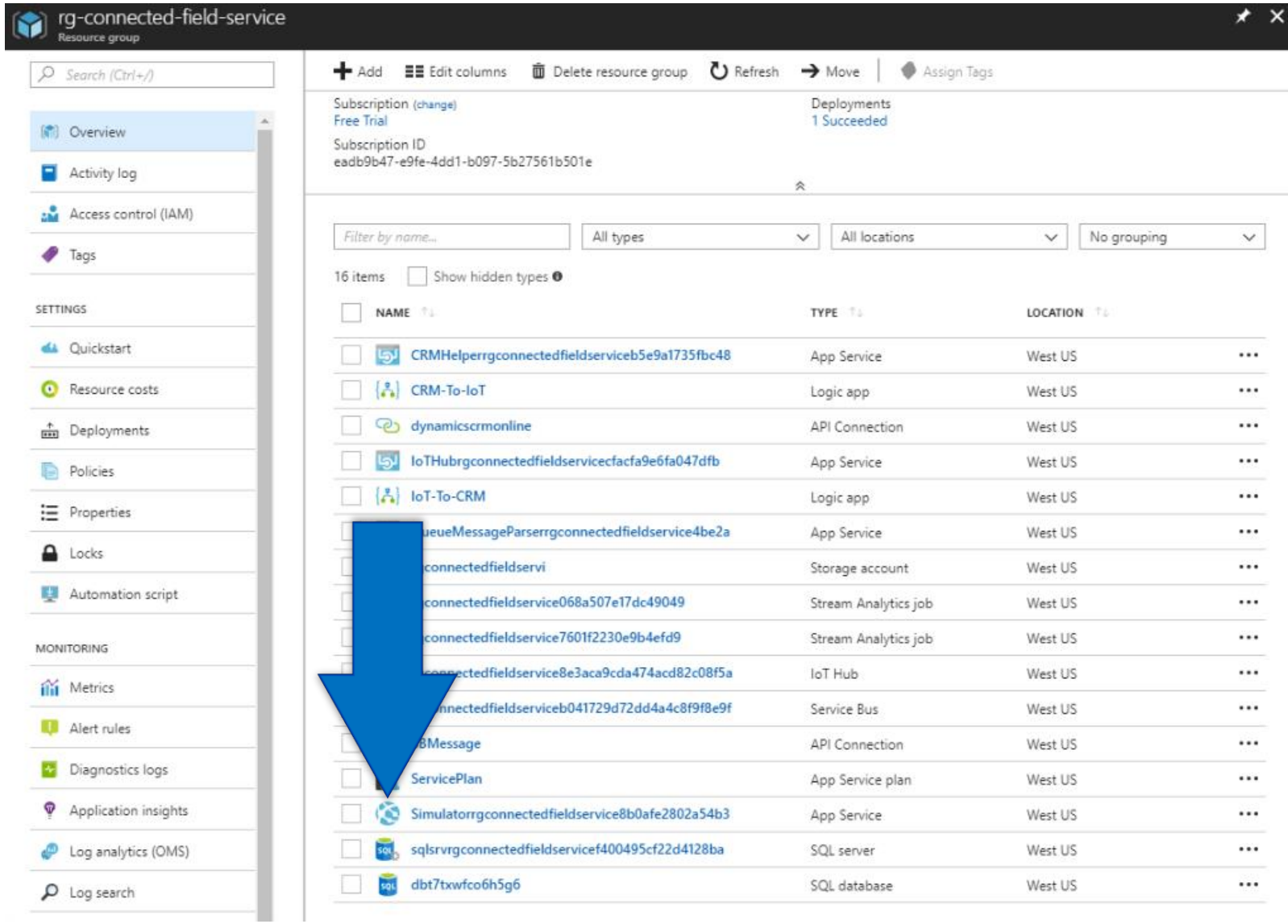


EXERCISE 3

App Service

Click on your Simulator App Service. It is named Simulator followed by the same name as your Resource Group with a long list of letters and numbers in the form of a GUID, in my case it's called `Simulatorrgconnectedfieldservice8b0afe2802a54b3`.

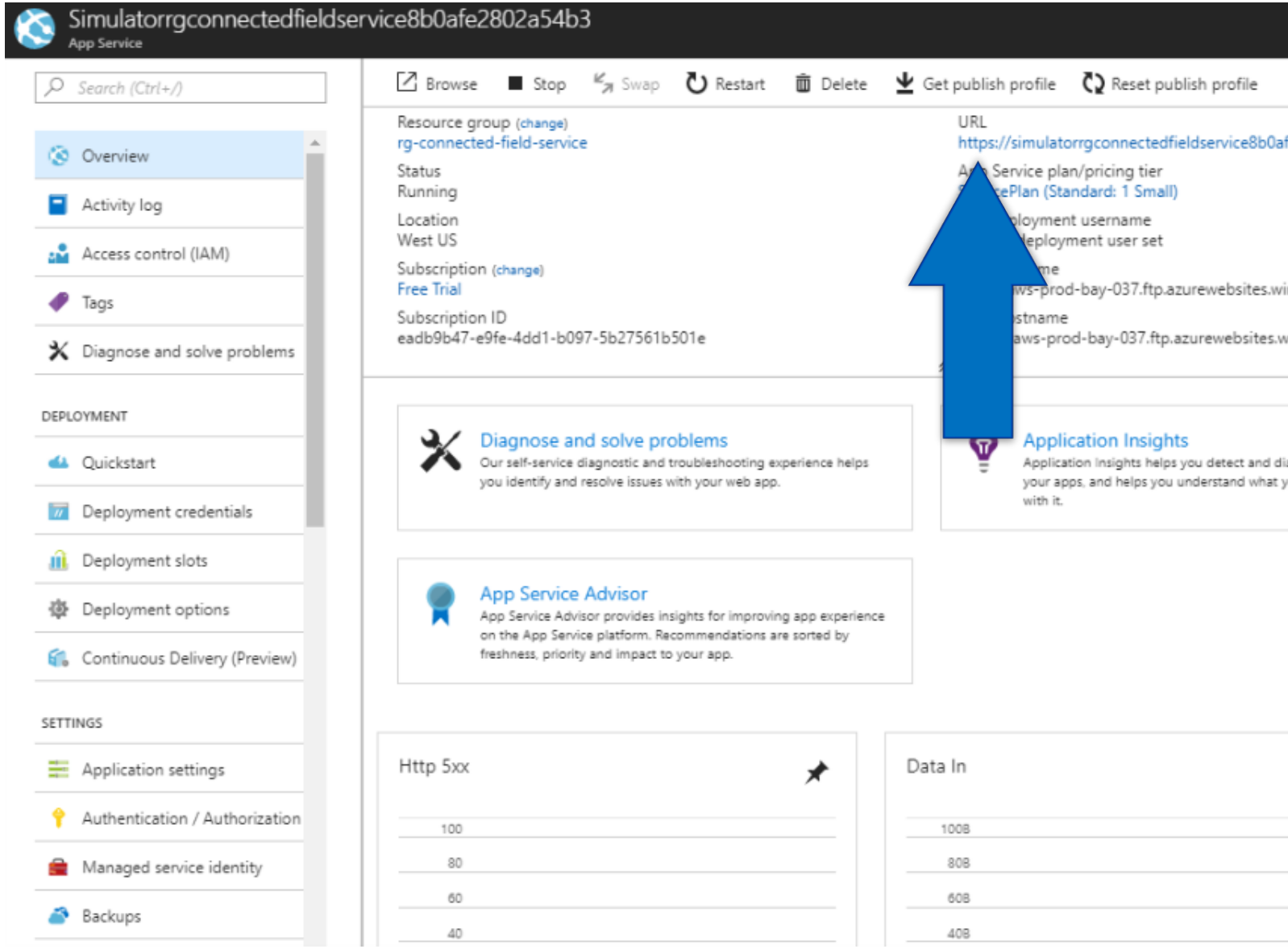


EXERCISE 3

IoT device Simulator Web App URL

After you click on your Simulator App Service, you'll be brought to the main page for your App Service.

Move your mouse to the right of the URL link, a copy button will appear. Click the copy button to copy the URL. In a new browser tab, paste the URL.



EXERCISE 5

Thermometer simulator

The Field Service IoT device simulator is a web app that we can use in place of a physical device to experiment with sending device alerts to Dynamics.

Next we will show you how to use this simulator to send messages to Azure and capture alerts in Dynamics.

Then we will setup a physical device.