

Blueprism: Dynamics 365 CRM

user guide



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# Introduction

This asset is designed to provide a standardized implementation of Microsoft Dynamics 365 CRM entity CRUD operations within a Blue Prism environment. The version of this asset contains actions to Create, Retrieve, Update, and Delete any entity within an instance of Microsoft Dynamics 365.

# Pre-requisites

Usage of this asset is dependent upon the following:

* An instance of Blue Prism, v6.6 or higher
  + The **Blueprism: Dynamics 365 Authenticate** skill must be installed and configured
* Access to an instance of Microsoft Dynamics 365

# Configuration

Begin by importing the ***.bpskill*** file which contains the following:

* Web API Services
  + Blueprism: Dynamics 365 CRM

Upon successful import of the Skill, simply edit the **Base URL** property of the **Blueprism: Dynamics 365 CRM** Web API Service, replacing the **[your dynamics instance name here]** text below with a valid value. The skill is then ready to use.

https://[your dynamics instance name here].api.crm11.dynamics.com/api/data/v9.1

# Using the Asset

The Skill contains the following actions.

**Configurations Notes:**

As of the creation of this document, the main Web API Reference for Microsoft Dynamics 365 can be found here: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/web-api/about?view=dynamics-ce-odata-9>. All Entity and Entity Property definitions can be reviewed/referenced from here when identifying appropriate values for inputs into the actions listed below.

As an example:

1. The complete list of CRM Entities can be found here: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/web-api/entitytypes?view=dynamics-ce-odata-9>.

2. The definition for the **contact** Entity and all of its properties can be found here: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/web-api/contact?view=dynamics-ce-odata-9>

## Common Parameters

The following input parameters are common to all the actions within this Skill.

Inputs:

| Name | Description | Data Type |
| --- | --- | --- |
| Token | The access token for authentication. | Text |

## Create

This action executes a POST request to create a Microsoft Dynamics 365 Entity.

Inputs:

| Name | Description | Data Type |
| --- | --- | --- |
| EntityType | The type of Entity to create | Text |
| Key Value Pairs | A collection of Entity property key value pairs of property names and corresponding values. The collection MUST contain the following two fields and at least one row: “PropertyName” and “PropertyValue”; both of type Text. | Collection |

Outputs:

| Name | Description | Data Type |
| --- | --- | --- |
| Response Content | The raw JSON response | Text |
| HTTP Status Code | The HTTP status code | Text |
| Response Headers | A collection of the HTTP response headers | Collection |

## Retrieve

This action executes a GET request to retrieve a single Microsoft Dynamics 365 Entity.

Inputs:

| Name | Description | Data Type |
| --- | --- | --- |
| EntityId | The ID of the Entity to retrieve | Text |
| EntityType | The type of Entity to retrieve | Text |

Outputs:

| Name | Description | Data Type |
| --- | --- | --- |
| Response Content | The raw JSON response | Text |
| HTTP Status Code | The HTTP status code | Text |
| Response Headers | A collection of the HTTP response headers | Collection |

## Retrieve List

This action executes a GET request to retrieve a list of all Microsoft Dynamics 365 Entities of a specified type.

Inputs:

| Name | Description | Data Type |
| --- | --- | --- |
| EntityType | The type of Entities to retrieve | Text |

Outputs:

| Name | Description | Data Type |
| --- | --- | --- |
| Response Content | The raw JSON response | Text |
| HTTP Status Code | The HTTP status code | Text |
| Response Headers | A collection of the HTTP response headers | Collection |

## Update

This action executes a PATCH request to update a single Microsoft Dynamics 365 Entity.

Inputs:

| Name | Description | Data Type |
| --- | --- | --- |
| EntityId | The ID of the Entity to update | Text |
| EntityType | The type of Entity to update | Text |
| Key Value Pairs | A collection of Entity property key value pairs of property names and corresponding values. The collection MUST contain the following two fields and at least one row: “PropertyName” and “PropertyValue”; both of type Text. | Collection |

Outputs:

| Name | Description | Data Type |
| --- | --- | --- |
| Response Content | The raw JSON response | Text |
| HTTP Status Code | The HTTP status code | Text |
| Response Headers | A collection of the HTTP response headers | Collection |

## Delete

This action executes a DELETE request to delete a Microsoft Dynamics 365 Entity.

Inputs:

| Name | Description | Data Type |
| --- | --- | --- |
| EntityId | The ID of the Entity to delete | Text |
| EntityType | The type of Entity to update | Text |

Outputs:

| Name | Description | Data Type |
| --- | --- | --- |
| Response Content | The raw JSON response | Text |
| HTTP Status Code | The HTTP status code | Text |
| Response Headers | A collection of the HTTP response headers | Collection |

# Support

Support for this skill is provided via the Blue Prism Digital Exchange Community Forum. Post your questions here:

[Digital Exchange Community Forum](https://community.blueprism.com/communities/community-home?communitykey=1e516cfe-4d1f-4de9-a9eb-58d15bf38c81&tab=groupdetails)