



LOGIC APP CONFIGURATION AND DEPLOYMENT STEPS

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Subscription Tenant Id: Specify a valid Office365 subscription Tenant ID.

Login to Azure

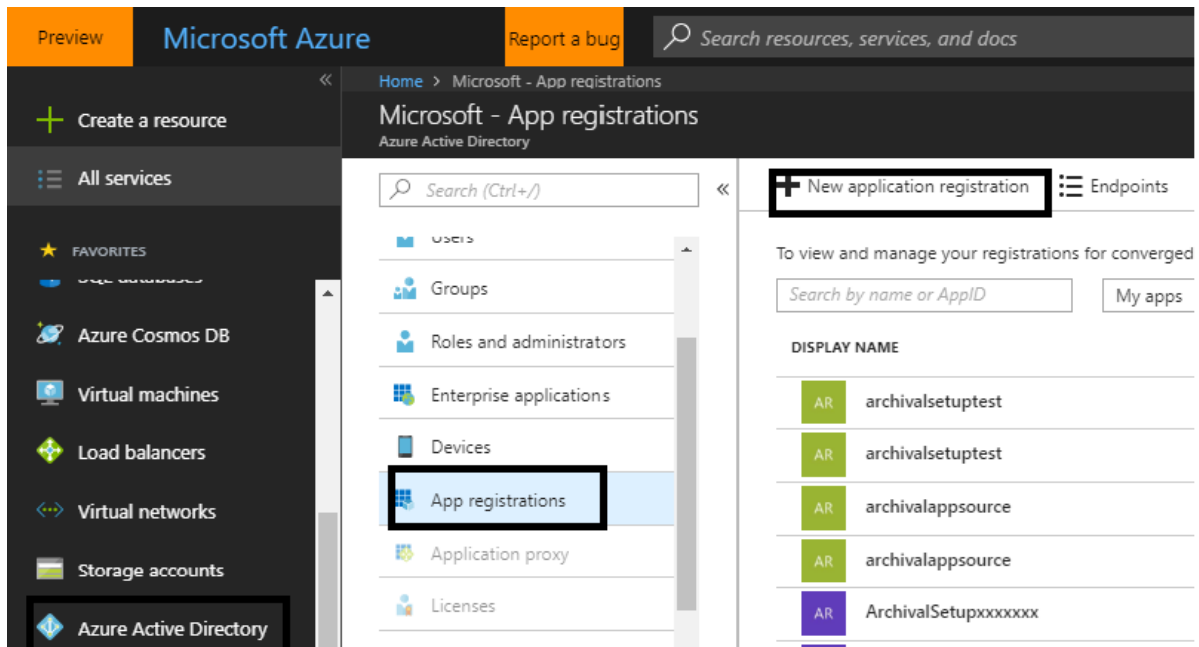
Go to 'Azure Active Directory'

Select Properties - Directory Id is **Subscription Tenant Id**

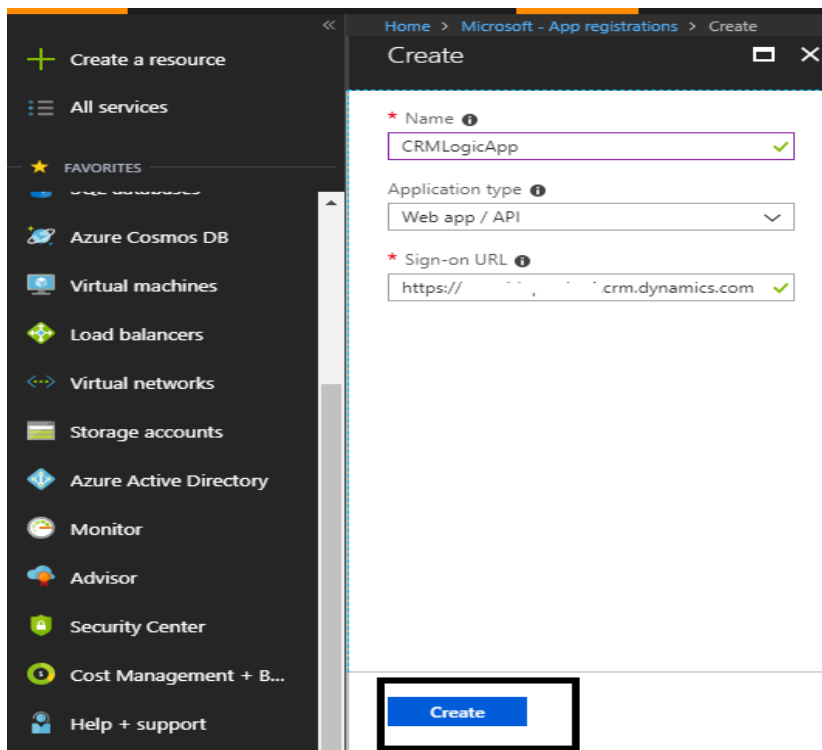
The screenshot shows the Microsoft Azure portal interface. On the left is a navigation pane with 'All services' and 'FAVORITES'. The main area is titled 'Microsoft - Properties' under 'Azure Active Directory'. A search bar is at the top. Below it, a list of services is shown, with 'Properties' selected. The right pane displays the 'Properties' form. The 'Directory ID' field is highlighted with a black box. Other fields include 'Name' (Microsoft), 'Country or region' (United States), 'Location' (Asia, United States, Europe datacenters), 'Notification language' (English), and 'Global admin can manage Azure Subscriptions and Management Groups' (Yes/No).

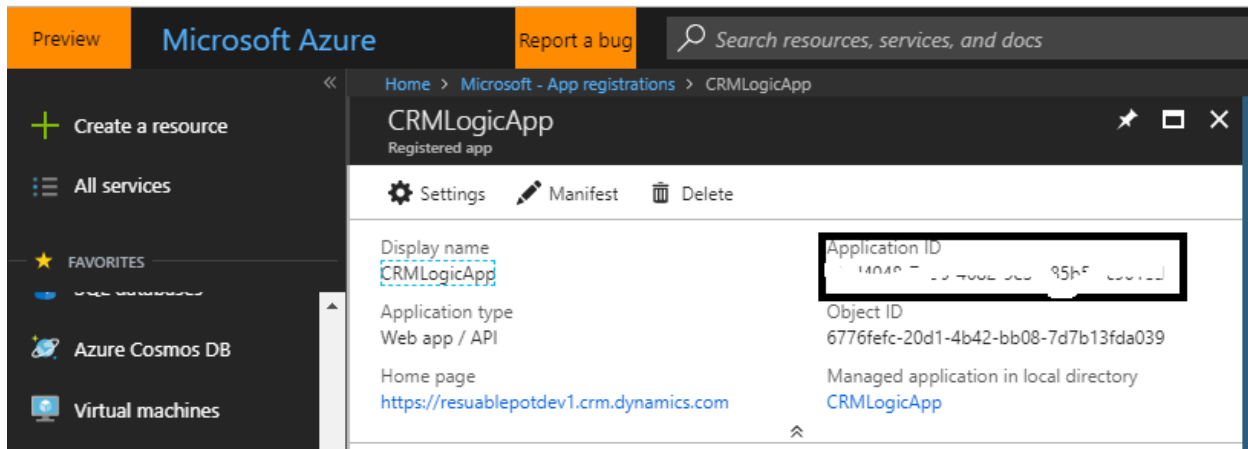
Crm Client Id: Specify a valid Azure AD app client ID to access CRM resource.

To get Crm Client Id : We need to Register Web App/API in Azure Active Directory→App Registration



Create New Web App/API

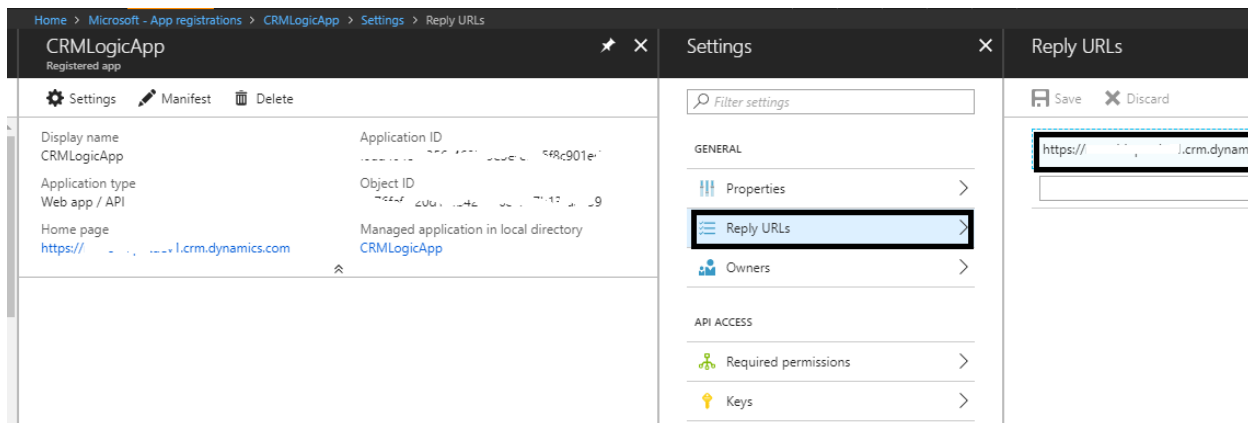




Note the Application Id in Note pad.

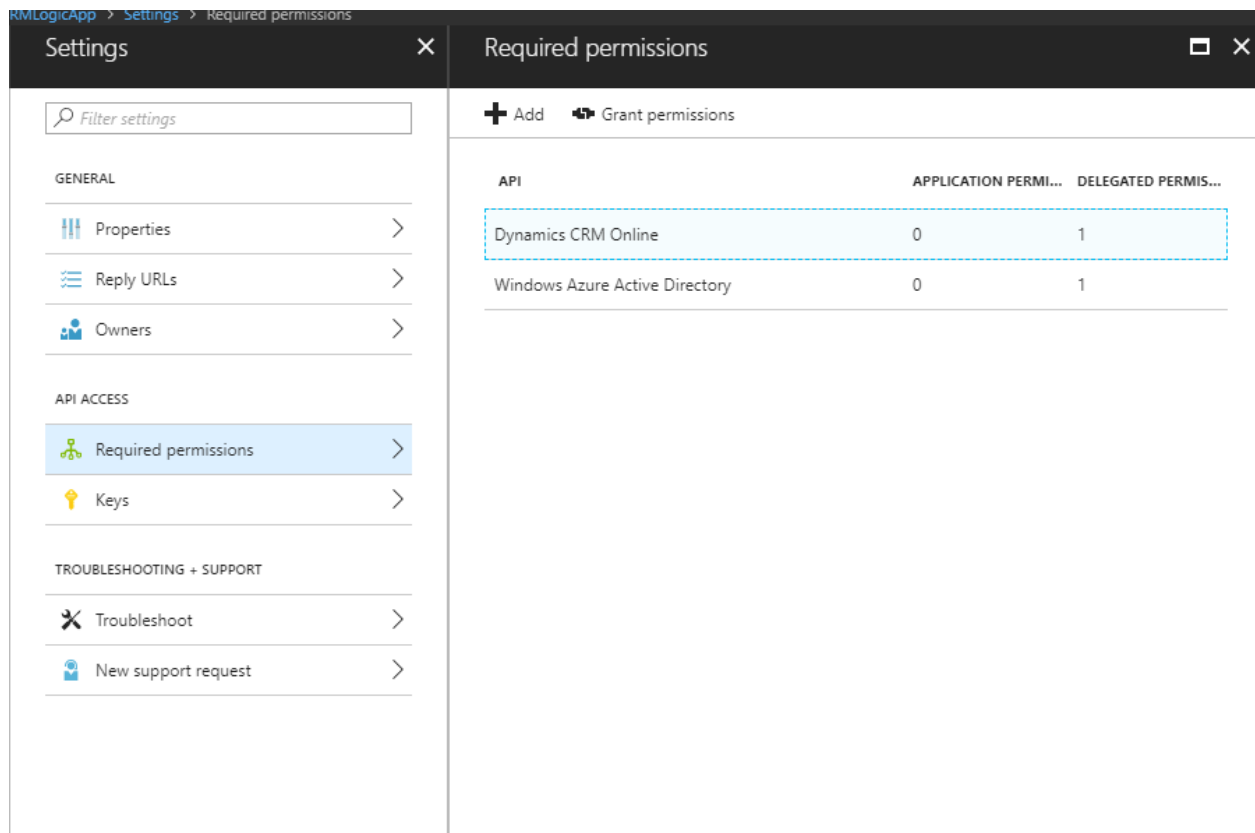
Make sure of the below things

1. Reply URLs should be the CRM Org name where we have huge size attachment

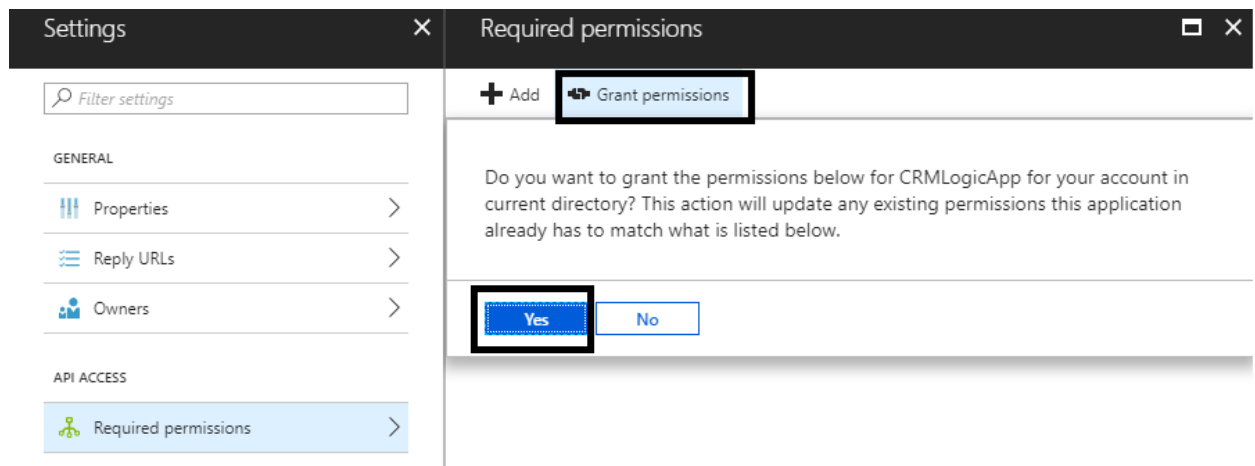


Click on Required Permissions and make sure below are available for give Permissions with Delegated Permissions

1. Dynamics CRM Online (If not we can add this by clicking Add button)
2. Windows Azure Active Directory

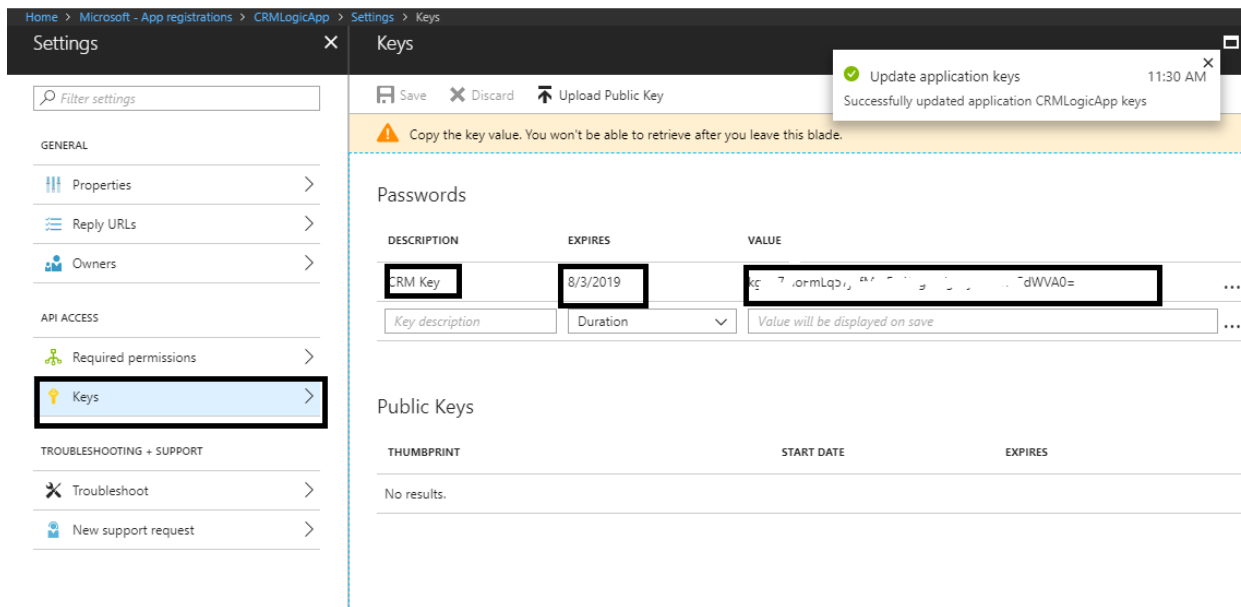
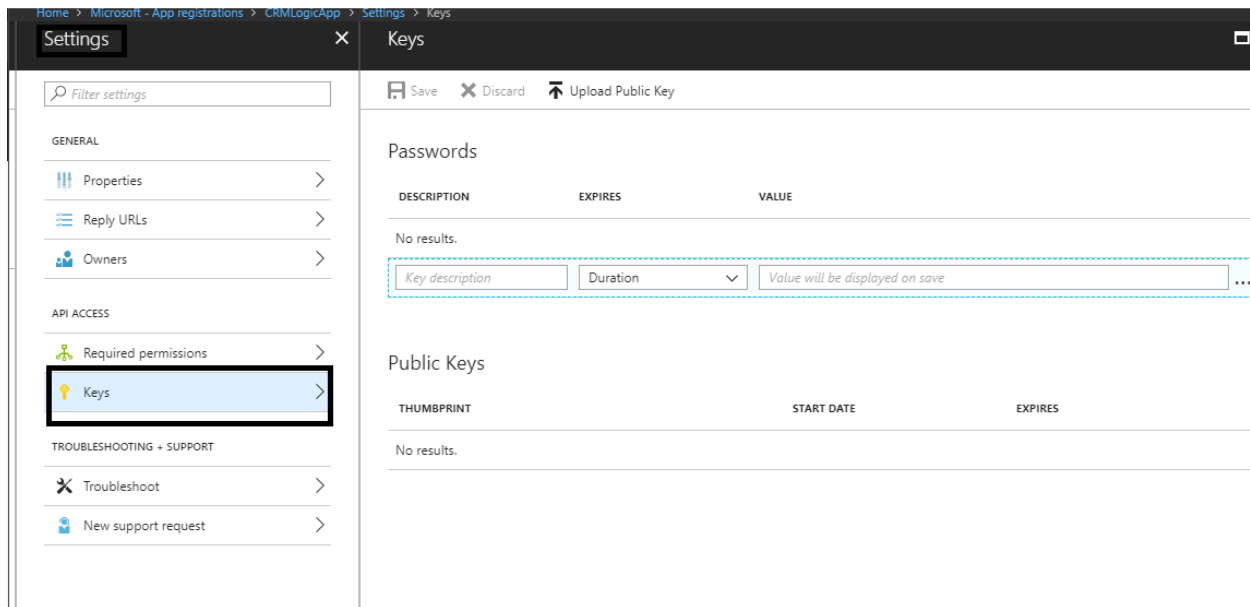


Click on Grant Permissions → Click on Yest



Crm Client Secret: Specify a valid Azure AD app client secret to access CRM resource.

To get Secret Key, Click on Keys→Enter Key Description, Duration, Value and Click on Save button



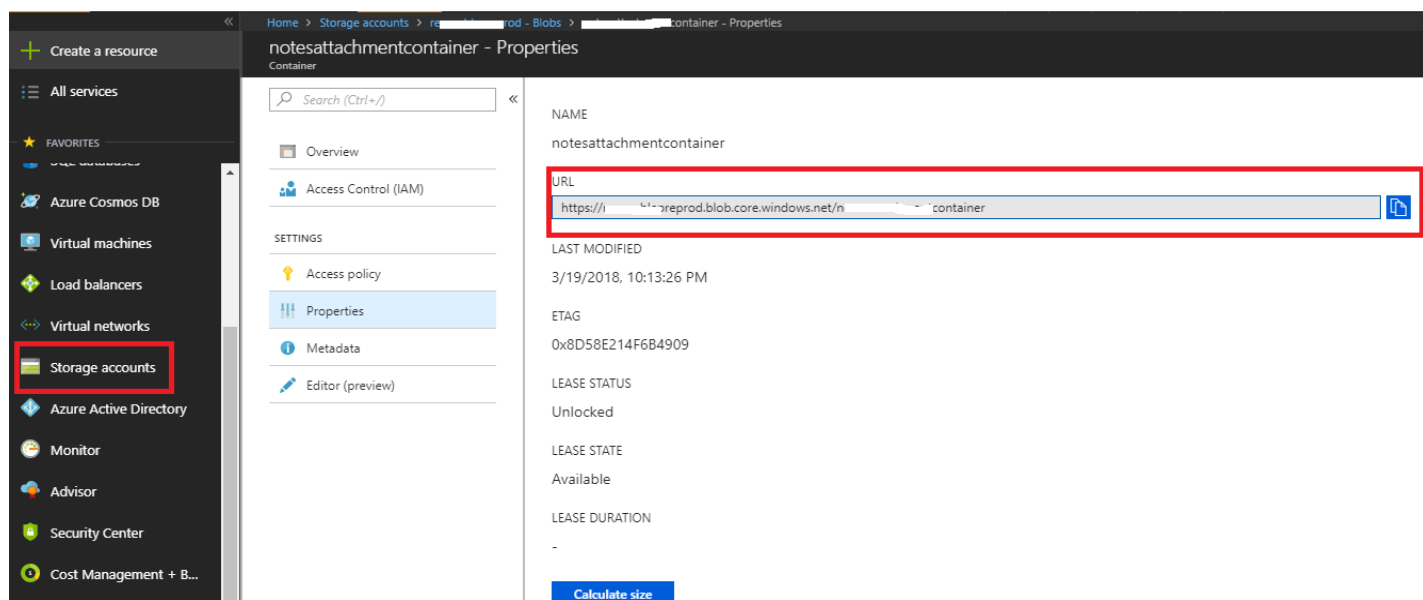
Copy the Secret and place it in Note Pad.

Azure Storage Blob Container Url: Specify a valid azureStorageBlobContainerUrl.

Go To Storage Account → Select the Blob → Select the Container

Click on Properties → copy the URL

Paste it in Note pad

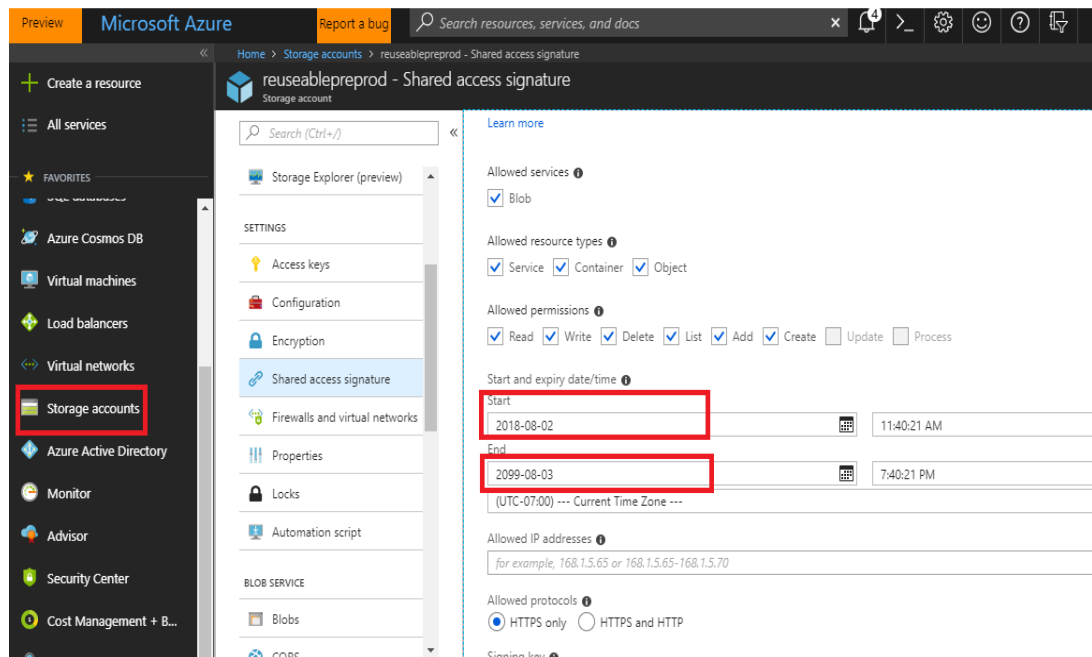


Azure Storage SAS Key: Specify a valid storage account SAS key.

Go To Storage Account → Select Blob → Select Shared Access Signature

Modify the Start and End Date and Click on Generate and SAS Key String and Copy the SAS Token

Paste it in Note pad .



Create Application User in CRM and give Admin role to the new Application User

Go To CRM instance→Login as Administrator

Select Settings→Security→Users→Select Application User view→Create New Application User

Dynamics 365 Settings Security New User SANDBOX

You need to assign security roles to new users Click to see a list of users who need Microsoft Dynamics 365 Security Roles. Assign Roles

SAVE SAVE & CLOSE GEO CODE FLOW FORM EDITOR

USER : APPLICATION USER New User

The information provided in this form is viewable by the entire organization.

Summary

Account Information

User Name * xyz@abc.com

*Application ID -----

Application ID URI -----

*Azure AD Object ID -----

User Information

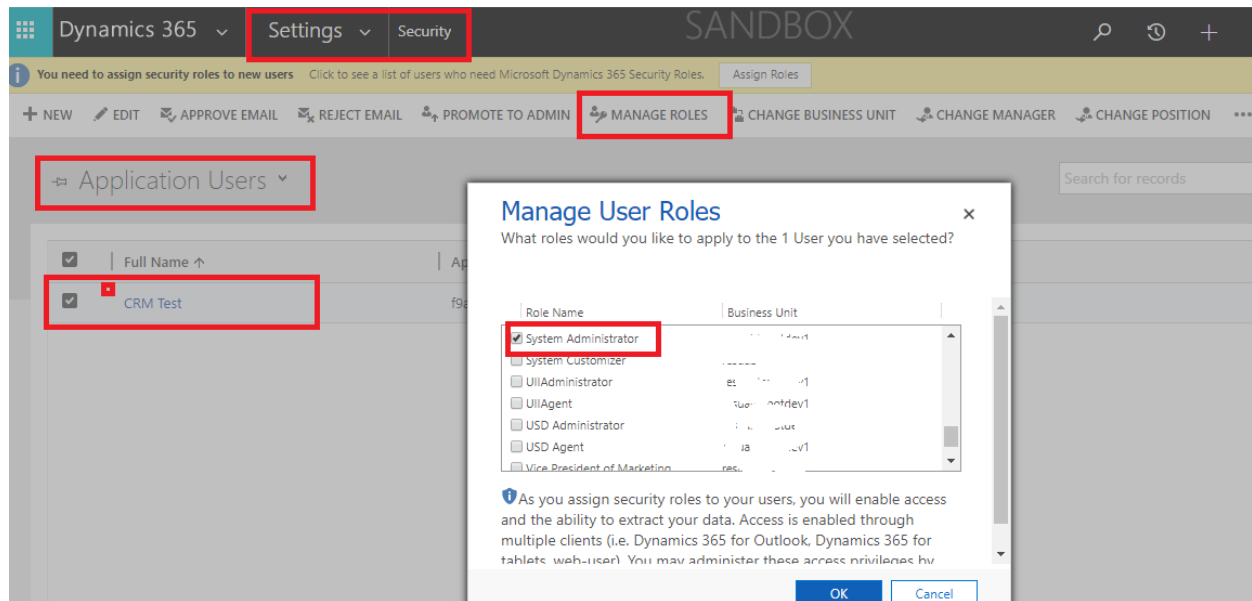
Enter Application Id (copied in Note Pad) and Click on Save.

User will be created.

Need to Assign a Role the newly created User

Settings→Security→Users→Application User view→Select the user→click on Manage Roles

And provide the Sys Admin role.



Deployment of Logic App

Now Navigate back to Git hub and Click on the option which ever we required either Email Attachment or Notes Attachment

Description

As a customer, I would like to move all my existing CRM attachments stored in Notes / Emails to an Azure Blob as a one time / continuous setup. These Logic Apps can be used together with the Attachment Management solution available in [AppSource](#).

Move CRM Note Attachments to Azure Blob



Move CRM Email Attachments to Azure Blob



Click on Any option will be re directed to Azure with Custom Deployment Template as below

Custom deployment

Deploy from a custom template

TEMPLATE

Customized template
1 resource

Edit template

Edit parameters

Learn more

BASICS

- * Subscription
- * Resource group ☒ Create new ☐ Use existing
- *
- * Location

SETTINGS

- * Logic App Name ⓘ ✓
- Logic App Location ⓘ
- * Subscription Tenant Id ⓘ ✓
- * Crm Client Secret ⓘ
- Crm Org Domain Name
- Crm Org Version
- * Azure Storage Blob Container Url ⓘ ✓
- * Azure Storage SAS Key ⓘ

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Run the Logic App :

Open the Logic App and Click on 'Run Trigger' to start moving the attachments to Azure blob

