

Integrate CRM with MachPanel

Summary

This article describes in detail about integrating Microsoft Dynamics CRM (All Versions) with MachPanel Control Server.

Applies To

This article applies to MachPanel build version 7 and above.

Pre-Requisites:

Please make sure that the CRM provisioning user is added in the local admins group on the following servers.

1. CRM Server(s) - Admins group
2. ADFS Server(s) - Admins group

The following Permissions should also be in place :

1. Account used in MachPanel for CRM provisioning is added as a deployment Admin in CRM Deployment Manager
2. Same account is added in CRM SQL sysadmin group.
3. Add and make sure that CRM Application Pool (Deployment Service Only) uses the same account
4. Same account should have [dbo] permissions on "MSCRM_Config", "ReportServer" and "ReportServerTemp" DBs

CRM Task Utilities:

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<http://www.machsol.com/updates/Dynamics-365-CRMTask.zip>

Folder "CRMTasks-v2" contains the following files ...

1. CRMTasks.exe
2. microsoft.crm.sdk.proxy.dll
3. microsoft.xrm.sdk.dll

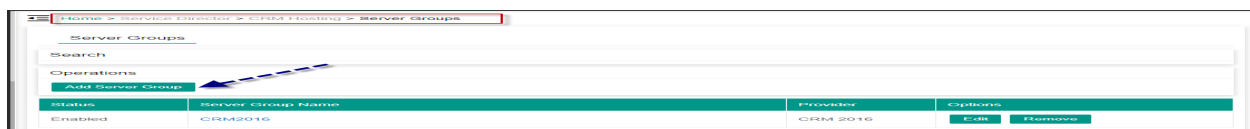
On Dynamics 365 server navigate to "C:\Program Files\MachSol\MachPanel Remote Server" and Replace the above files.

Procedure:

- Open MachPanel Control Panel Website (You can do it by opening MachPanel Control Server Configuration Studio and then navigating to **Configure > Control Panel Website**, and then clicking on the URL in it). Log in with the provider credentials.
- Following CRM providers are supported in MachPanel.

CRM Providers		
Provider	Integration Status	Status
CRM 4.0	Stable	<input checked="" type="checkbox"/> Enabled
CRM 2011	Stable	<input checked="" type="checkbox"/> Enabled
CRM 2013	Stable	<input checked="" type="checkbox"/> Enabled
CRM 2015	Stable	<input checked="" type="checkbox"/> Enabled
CRM 2016	Stable	<input checked="" type="checkbox"/> Enabled
Dynamics 365	Stable	<input checked="" type="checkbox"/> Enabled

- Navigate to **Home >> Service Director >> CRM Hosting >> Server group** and then click on **Add Server Group**.



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- Adding CRM Server is a two step process. In the first Server Group is added and in the second step CRM Server is added:

Home > Service Director > CRM Hosting > Server Groups > Add Server Group

Step-1 Step-2

Add Server Group

* Server Group Name: CRM Server Group

Provider: CRM 2016

Active Directory Domain: PSS-LAB2016

*LDAP URL: LDAP://OU=Hosting,DC=pss-lab2016,DC=k

Fill Style: Least Filled First

Enabled:

Override domain credentials: Use this option if you want to use a different account for this service from what is specified in active directory domain settings.

Next Cancel

- **Server Group Name:** This is the friendly name of the server group.
- **Provider:** Select the provider you wish to add.
- **Active Directory Domain:** Select the active directory whose credentials will be used while provisioning
- **LDAP URL:** Provide the path of the Organizational Unit in AD under which the users will be created
- **Fill Style:** Select from one of the two options
 1. **Least Filled First:** Setup hosting on the group member which is least filled
 2. **One-by-One:** Setup hosting on group members in circular manner
- **Enabled:** If unchecked, system will not provision any accounts on the server group members
- **Override Domain Credentials:** You can check this option and use credentials other than the one mentioned in the Active Directory Domain

4) In the second step, CRM Server is added:

Server Information

IP Address

Hostname

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- In Server information section provide the **Reference Id** and **Server IP**.

CRM Information		
*CRM IFD site URL:	<input type="text" value="machsol.com"/>	e.g. xyz.com,abc.org
*URL base:	<input type="text" value="https://"/>	MSCRMServices/2007/
CRM Server Port:	<input type="text" value="443"/>	
Discovery Service URL:	<input type="text" value="https://"/>	XRMServices/2011/Discovery.svc
Discovery Service Port:	<input type="text" value="443"/>	
SQL Server Name:	<input type="text" value="crm1-pss-2016"/>	Name of SQL server that is used for the Microsoft CRM database.:
*SQL Report server URL:	<input type="text" value="http://crm1-pss-2016:8080/ReportServer"/>	e.g. http://Host/ReportServer.
ADFS Server FQDN:	<input type="text" value="adfs-pss.pss-lab2016.local"/>	
External Relying Party Display Name:	<input type="text" value="IFD"/>	
Enabled:	<input checked="" type="checkbox"/>	
Add Host Entry:	<input checked="" type="checkbox"/>	

- In CRM Information section provide **IFD site URL**, **URL base**, **CRM Server Port**, **SQL Server Name** and **SQL Report Server URL**.

- In **CRM 2011, and later**, the following two fields are mandatory in **IFD** deployments and are optional without IFD.

- ADFS Server FQDN
- External Relying Party Display Name

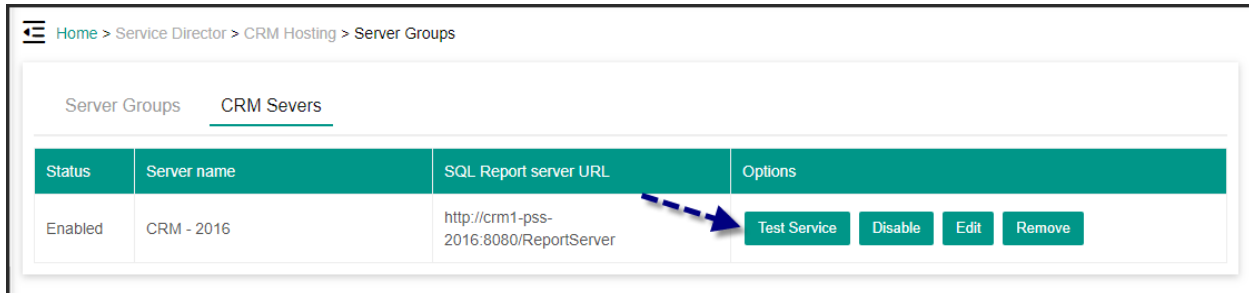
- Enabled:** If unchecked, system will not provision any accounts on this server

Handle DNS: <input checked="" type="checkbox"/>	
Handle DNS	
Select primary DNS server:	<input type="text" value="Nothing selected"/>
Public IP of CRM server:	<input type="text" value="172.16.30.31"/>
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

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- **Handle DNS:** You can also add DNS Handling feature at server level. A-Record will be created in the required Zone

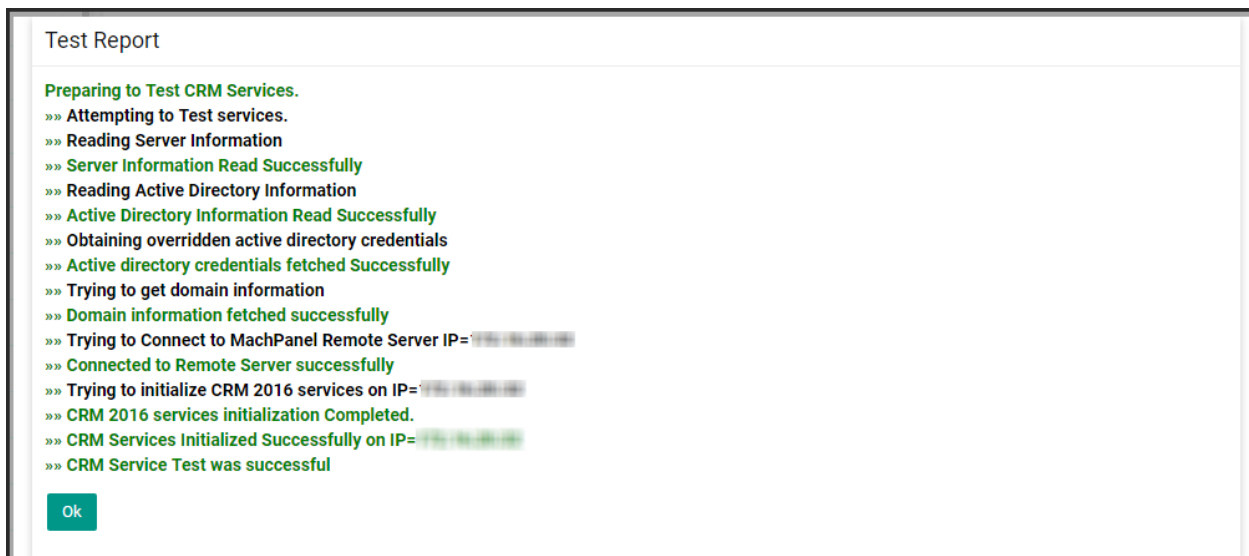
5) Now click on the newly created Server Group to enter in the **CRM Servers** tab. Click on **'Test Service'**



The screenshot shows the MachPanel interface for CRM Servers. The breadcrumb trail is Home > Service Director > CRM Hosting > Server Groups. The 'CRM Servers' tab is active. A table lists server groups with columns for Status, Server name, SQL Report server URL, and Options. A blue dashed arrow points to the 'Test Service' button in the Options column for the 'CRM - 2016' server group.

Status	Server name	SQL Report server URL	Options
Enabled	CRM - 2016	http://crm1-pss-2016.8080/ReportServer	Test Service Disable Edit Remove

6) If you get below Test Report then you have successfully integrated CRM with MachPanel:



The screenshot shows a 'Test Report' dialog box with a list of log messages indicating successful integration. The messages include: Preparing to Test CRM Services, Attempting to Test services, Reading Server Information, Server Information Read Successfully, Reading Active Directory Information, Active Directory Information Read Successfully, Obtaining overridden active directory credentials, Active directory credentials fetched Successfully, Trying to get domain information, Domain information fetched successfully, Trying to Connect to MachPanel Remote Server IP= [redacted], Connected to Remote Server successfully, Trying to initialize CRM 2016 services on IP= [redacted], CRM 2016 services initialization Completed, CRM Services Initialized Successfully on IP= [redacted], and CRM Service Test was successful. An 'Ok' button is at the bottom left.

```
Test Report

Preparing to Test CRM Services.
»» Attempting to Test services.
»» Reading Server Information
»» Server Information Read Successfully
»» Reading Active Directory Information
»» Active Directory Information Read Successfully
»» Obtaining overridden active directory credentials
»» Active directory credentials fetched Successfully
»» Trying to get domain information
»» Domain information fetched successfully
»» Trying to Connect to MachPanel Remote Server IP= [redacted]
»» Connected to Remote Server successfully
»» Trying to initialize CRM 2016 services on IP= [redacted]
»» CRM 2016 services initialization Completed.
»» CRM Services Initialized Successfully on IP= [redacted]
»» CRM Service Test was successful

Ok
```

MachPanel Knowledgebase

<https://kb.machsol.com/Knowledgebase/50277/Integrate-CRM-with-MachPanel>