

Define the Connection to a Dynamics CRM Environment

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CRM 4.0

Overview

Before you can use Dynamics CRM Activities in a workflow, you must first define the connection to your Dynamics CRM environment.

Wizard Tips

- The **Credential Name** must be a user who has permission to connect to a CRM service.
- Click the **Discover Organizations** button to view the Dynamics CRM organizations that are associated with this CRM environment.

CRM 2011/2013

Overview

Before you can use Dynamics CRM Activities in a workflow, you must first define the connection to your Dynamics CRM environment.

You can connect to the following CRM deployment types.

- On-premise
- Online
- Partner Hosted

You can use the following authentication types. Verify that the authentication type is supported by the deployment type.

- Active Directory
- Federated
- Onlined Federated
- Live ID

Wizard Tips

- The **Home Realm URL** is the URL of the cross-realm STS metadata endpoint. If you have several STSs, you must specify which one you want to connect to. To identify the Home Realm URL, ask your CRM administrator.
- For **Credential Type**, if you select Active Directory authentication, you can use any credential type. For all other authentication options, the credential type must be **Store**.
- The **Credential Name** must be a user who has permission to connect to a CRM service.
- Click the **Discover Organizations** button to view the Dynamics CRM organizations that are associated with this CRM environment.