



INTEGRATION PACK FOR MICROSOFT DYNAMICS 365

For Microsoft System Center Orchestrator

For System Center 2016 and 2019, you must use the 32-bit version of the integration pack, which has the name **Kelverion_Integration_Pack_for_Microsoft_Dynamics_365_3.01**

For System Center 2022 and later, you must use the 64-bit version of the integration pack, which has the name **Kelverion_IP_Microsoft_Dynamics_x64_3.01**

Release Notes

Version 3.01

July 2024

Introduction

The **Integration Pack for Microsoft Dynamics 365** is an add-on for Microsoft System Center Orchestrator that enables integration with the Microsoft Dynamics platform.

The Integration Pack provides the following activities:

- Create Attachment
- Create Record
- Delete Record
- Execute Request
- Get Attachment
- Get Record
- Monitor Record
- Update Record

System Requirements

The Integration Pack for Microsoft Dynamics 365 requires the following software to be installed and configured prior to implementing the integration. For more information about installing and configuring Orchestrator and Microsoft Dynamics, refer to the respective product documentation.

Kelverion_Integration_Pack_for_Microsoft_Dynamics_365 (32-bit)

- Microsoft System Center Orchestrator 2016, 2019
- Microsoft .NET Framework 4.7.2
- Microsoft Dynamics 365 Online Subscription

Kelverion_IP_Microsoft_Dynamics_365_x64 (64-bit)

- Microsoft System Center Orchestrator 2022
- Microsoft .NET Framework 4.7.2
- Microsoft Dynamics 365 Online Subscription

Registering and Deploying the Integration Pack

After you download the integration pack, you register the integration pack file with the Orchestrator management server, and then deploy it to runbook servers and computers that have the Runbook Designer installed.

IMPORTANT: Ensure that you are deploying the correct version of the Integration Pack.

- For System Center 2016 and 2019, you must use the 32-bit version of the integration pack, which has the name **Kelverion_Integration_Pack_for_Microsoft_Dynamics_365**
- For System Center 2022 and later, you must use the 64-bit version of the integration pack, which has the name **Kelverion_IP_Microsoft_Dynamics_365_x64**

To register the integration pack:

1. On the management server, copy the **.OIP** file for the integration pack to a local hard drive or network share.
2. Confirm that the file is not set to **Read Only** to prevent unregistering the integration pack later.
3. Start the **Deployment Manager**.
4. In the navigation pane of the Deployment Manager, expand **Orchestrator Management Server**, right-click **Integration Packs** to select **Register IP with the Orchestrator Management Server**. The **Integration Pack Registration Wizard** opens.
5. Click **Next**.
6. In the **Select Integration Packs or Hotfixes** dialog box, click **Add**.
7. Locate the **.OIP** file that you copied locally from step 1, click **Open** and then click **Next**.
8. In the **Completing the Integration Pack Wizard** dialog box, click **Finish**.
9. On the **End User Agreement** dialog box, read the Keverion License Terms, and then click **Accept**.
10. The **Log Entries** pane displays a confirmation message when the integration pack is successfully registered.

To deploy the integration pack:

1. In the navigation pane of the **Deployment Manager**, right-click **Integration Packs**, click **Deploy IP to Runbook Server or Runbook Designer**.
2. Select the integration pack that you want to deploy, and then click **Next**.
3. Enter the name of the runbook server or computers with the Runbook Designer installed, on which you want to deploy the integration pack, click **Add**, and then click **Next**.
4. Continue to add additional runbook servers and computers running the Runbook Designer, on which you want to deploy the integration pack. Click **Next**.
5. In the **Installation Options** dialog box, configure the following settings.
6. To choose a time to deploy the integration pack, select the **Schedule installation** check box, and then select the time and date from the **Perform installation** list.
7. Click one of the following:
 - a. **Stop all running runbooks before installing the integration pack** to stop all running runbooks before deploying the integration pack.
 - b. **Install the Integration Packs without stopping the running Runbooks** to install the integration pack without stopping any running runbooks.
8. Click **Next**.
9. In the **Completing Integration Pack Deployment Wizard** dialog box, Click **Finish**.
10. When the integration pack is deployed, the **Log Entries** pane displays a confirmation message.

For more information about how to install integration packs, see the [How to Install an Integration Pack](https://technet.microsoft.com/en-us/library/hh420346.aspx) (https://technet.microsoft.com/en-us/library/hh420346.aspx).

Change History

Version 3.01

- Improved language support for field browser values.

Version 3.0

- Added new 64-bit product version with support for System Center Orchestrator 2022.
- Verified support for the current version of Microsoft Dynamics 365 Online.

Version 2.0

- Verified support for the current version of Microsoft Dynamics 365 Online.
- Changed the Integration Pack configuration options to support the new API authentication requirements. You will have to re-configure the integration pack configuration options in order for existing runbooks and activities to continue to function. Please refer to **Configuring the Kolverion Integration Pack for Microsoft Dynamics 365** section in the user guide for details on how to re-configure your configuration options.
- Removed support for TLS 1.0 and TLS 1.1.

Version 1.2

- Added support for Dynamics 365 (online) version 9.0.
- Added support for TLS 1.2.

Version 1.1

- Added support for Microsoft Dynamics On-Premises 2015 and 2016
- Added Execute Request activity to support specific entity actions.
- Design time and runtime performance improvements.
- Fixed issue with publishing attribute names which include square brackets, due to limitation in SC Orchestrator which prevents publishing data which includes square brackets in its name. This is a breaking change which will require re-configuring any activity which contains an input or output property with a name which contains square brackets.
- IP has been renamed from “Kolverion Integration Pack for Microsoft Dynamics CRM” to “Kolverion Integration pack for Microsoft Dynamics 365”. This change requires Configuration Options previously created in version 1.00 to be opened and re-saved with the correct configuration information.

Version 1.0

- Initial release.