

PDF-Docs Configuration

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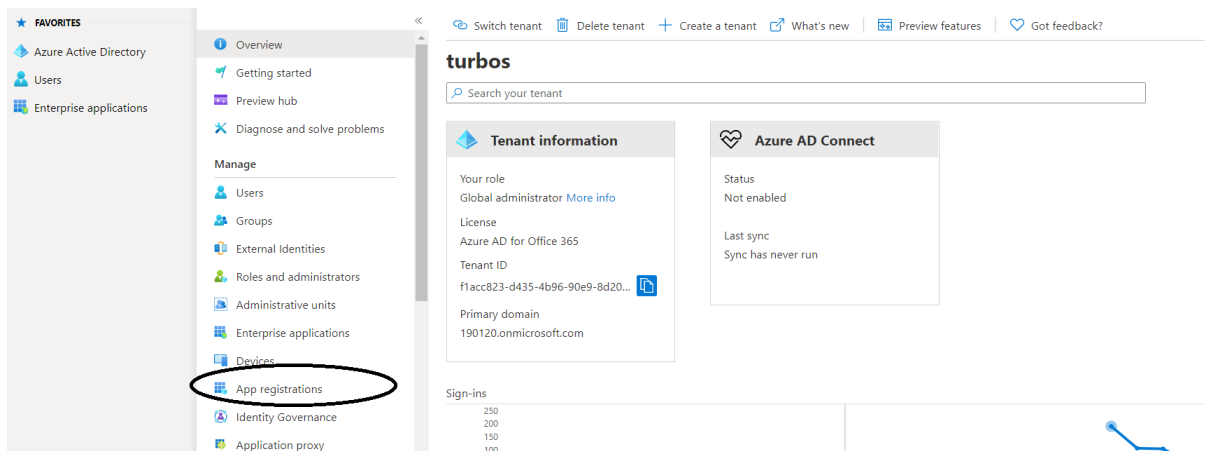
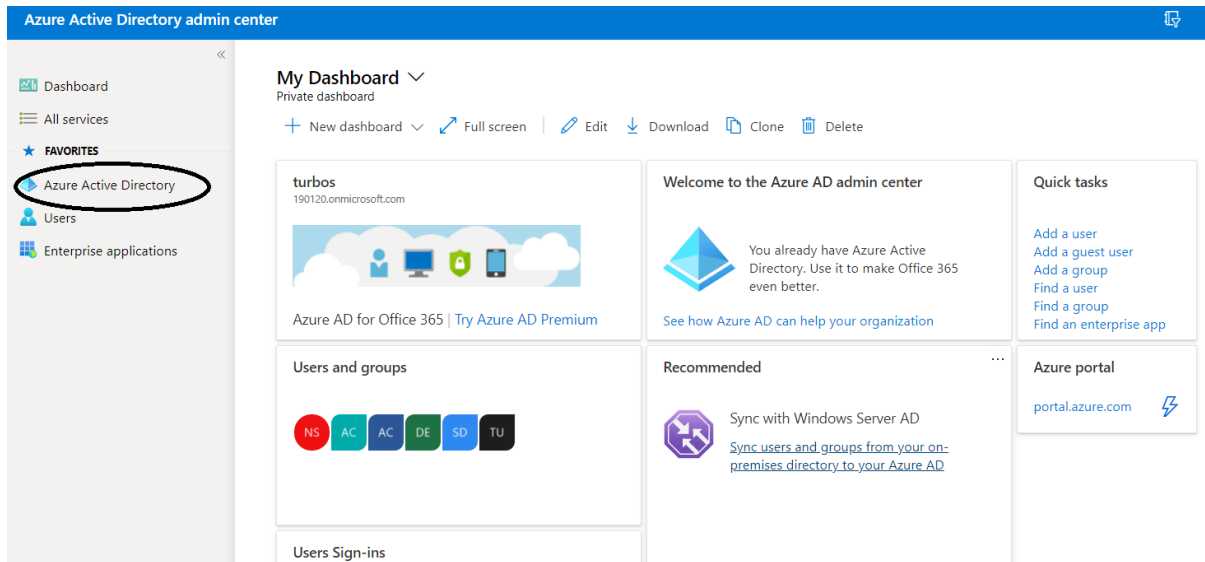
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Azure Application Register

Navigate to <https://portal.azure.com>

Sign in with your Online CRM Username and password.

Go to Azure Active Directory to register application.



Go to App registration.

Create a New Registration record.

Register an application

Register an app you're working on here. Integrate gallery apps and other apps from outside your organization by adding from [Enterprise](#)

* Name

The user-facing display name for this application (this can be changed later).

PDF-Docs APP

Supported account types

Who can use this application or access this API?

- Accounts in this organizational directory only (ndynobj only - Single tenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbo)
- Personal Microsoft accounts only

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Web

e.g. <https://example.com/auth>

By proceeding, you agree to the [Microsoft Platform Policies](#)

Register

After the creation of application user can see tenant id and client id.

PDF-Docs APP

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Overview

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Authentication

Certificates & secrets

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Expose an API

Essentials

Display name : PDF-Docs APP

Supported account types : My organization only

Application (client) ID : **46233a02-2814-40fa-9941-e76c5214625**

Redirect URIs : Add a Redirect URI

Directory (tenant) ID : **291492e-1933-4e6d-86b8-772214141f6**

Application ID URI : Add an Application ID URI

Object ID : 67b0382c-3cc1-4839-9db5-a819ff1c11ba

Managed application in L... : PDF-Docs APP

Welcome to the new and improved App registrations. Looking to learn how it's changed from App registrations (Legacy)? [Learn more](#)

Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure AD Graph. We will continue to provide technical support and longer provide feature updates. Applications will need to be upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. [Learn more](#)

Get a Secret key from Certificates and Secrets tab.

Certificates
 Certificates can be used as secrets to prove the application's identity when requesting a token. Also can be referred to as public keys.

Upload certificate

Thumbprint	Start date	Expires	ID
No certificates have been added for this application.			

Client secrets ←

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

+ New client secret

Description	Expires	Value	ID
No client secrets have been created for this application.			

Create New Client Secret key

PDF-Docs APP | Certificates & secrets

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Add a client secret

Description
 PDF-Docs

Expires
 In 1 year
 In 2 years
 Never

Add Cancel

Client secrets

Get the value which is present in record. Save it for further use.

Client secrets

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

+ New client secret

Description	Expires	Value	ID
PDF-Docs	12/31/2299	mJy.DsJfn6FhuP~-ww85-41-0iTraR.q6b	afc9a0dc-197b-4ec3-86d9-729fb3ea5ff1

API permissions

Give API Permissions to read and write files from one drive.

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Configured permissions

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions show all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for turbos

API / Permissions name	Type	Description	Admin consent req...	Status
Microsoft Graph (1)				
User.Read	Delegated	Sign in and read user profile	No	

To view and manage permissions and user consent, try [Enterprise applications](#).

Add a permission

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Microsoft APIs APIs my organization uses My APIs

Commonly used Microsoft APIs

Microsoft Graph
Take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Azure AD, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.

<p>Azure Rights Management Services Allow validated users to read and write protected content</p>	<p>Azure Service Management Programmatic access to much of the functionality available through the Azure portal</p>	<p>Data Export Service for Microsoft Dynamics 365 Export data from Microsoft Dynamics CRM organization to an external destination</p>
<p>Dynamics 365 Business Central Programmatic access to data and functionality in Dynamics 365 Business Central</p>	<p>Dynamics CRM Access the capabilities of CRM business software and ERP systems</p>	<p>Dynamics ERP Programmatic access to Dynamics ERP data</p>

Click on Microsoft Graph.

< All APIs



Microsoft Graph

<https://graph.microsoft.com/> Docs

What type of permissions does your application require?

Delegated permissions

Your application needs to access the API as the signed-in user.

Application permissions

Your application runs as a background service or daemon without a signed-in user.

a) Delegate permissions

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The "Admin consent required" flag reflect the value in your app configuration.

Configured permissions

Applications are authorized to use all the permissions the application has requested.

+ Add a permission

API / Permissions name

Microsoft Graph (1)

User.Read

To view and manage permissions, click on the permission name.

Family

Files (3)

<input type="checkbox"/>	Files.Read	Read user files	No
<input checked="" type="checkbox"/>	Files.Read.All	Read all files that user can access	No
<input type="checkbox"/>	Files.Read.Selected	Read files that the user selects (preview)	No
<input checked="" type="checkbox"/>	Files.ReadWrite	Have full access to user files	No
<input checked="" type="checkbox"/>	Files.ReadWrite.All	Have full access to all files user can access	No
<input type="checkbox"/>	Files.ReadWrite.AppFolder	Have full access to the application's folder (preview)	No
<input type="checkbox"/>	Files.ReadWrite.Selected	Read and write files that the user selects (preview)	No

Financials

User (5)

<input type="checkbox"/>	User.Export.All	Export user's data	Yes
<input type="checkbox"/>	User.Invite.All	Invite guest users to the organization	Yes
<input type="checkbox"/>	User.ManageIdentities.All	Manage user identities	Yes
<input checked="" type="checkbox"/>	User.Read	Sign in and read user profile	No
<input checked="" type="checkbox"/>	User.Read.All	Read all users' full profiles	Yes
<input checked="" type="checkbox"/>	User.ReadBasic.All	Read all users' basic profiles	No
<input checked="" type="checkbox"/>	User.ReadWrite	Read and write access to user profile	No
<input checked="" type="checkbox"/>	User.ReadWrite.All	Read and write all users' full profiles	Yes

b) Application permission

Files (2)

<input checked="" type="checkbox"/>	Files.Read.All	Read files in all site collections	Yes
<input checked="" type="checkbox"/>	Files.ReadWrite.All	Read and write files in all site collections	Yes

▼ User (1)

<input type="checkbox"/>	User.Export.All ⓘ Export user's data	Yes
<input type="checkbox"/>	User.Invite.All ⓘ Invite guest users to the organization	Yes
<input type="checkbox"/>	User.ManageIdentities.All ⓘ Manage all users' identities	Yes
<input type="checkbox"/>	User.Read.All ⓘ Read all users' full profiles	Yes
<input checked="" type="checkbox"/>	User.ReadWrite.All ⓘ Read and write all users' full profiles	Yes

After inserting permissions click grant admin consent for turbos. Then click on Yes.

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions show all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission Grant admin consent for turbos

API / Permissions name	Type	Description	Admin consent req...	Status
▼ Microsoft Graph (4)				
Files.Read.All	Delegated	Read all files that user can access	No	
Files.ReadWrite	Delegated	Have full access to user files	No	
Files.ReadWrite.All	Delegated	Have full access to all files user can access	No	
User.Read	Delegated	Sign in and read user profile	No	

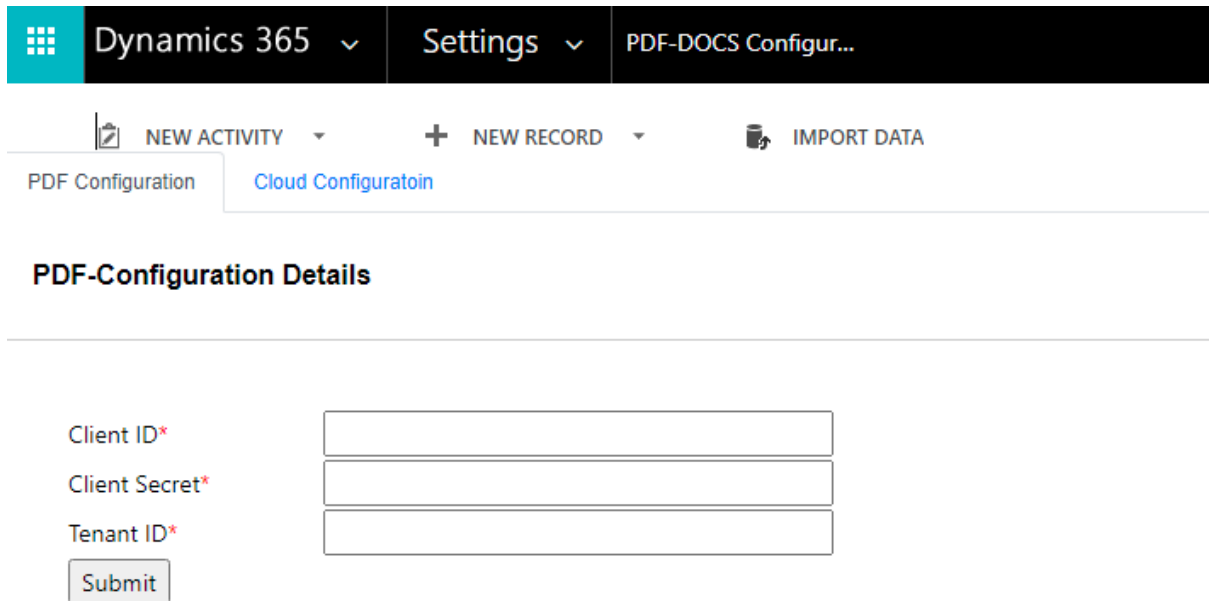
Do you want to grant consent for the requested permissions for all accounts in turbos? This will update any existing admin consent records this application already has to match what is listed below.

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Navigate to CRM → Settings → PDF Docs Configuration

Enter the Client ID, Client Secret, Tenant ID and submit.

Now you are ready to download the documents as PDF



The screenshot shows the Dynamics 365 interface for PDF-DOCS Configuration. The top navigation bar includes 'Dynamics 365', 'Settings', and 'PDF-DOCS Configur...'. Below this, there are buttons for 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. The main content area is titled 'PDF-Configuration Details' and contains three input fields for 'Client ID*', 'Client Secret*', and 'Tenant ID*', along with a 'Submit' button.

Client ID*

Client Secret*

Tenant ID*