Technical documentation

Risika CRM Connector x Microsoft Dynamics 365

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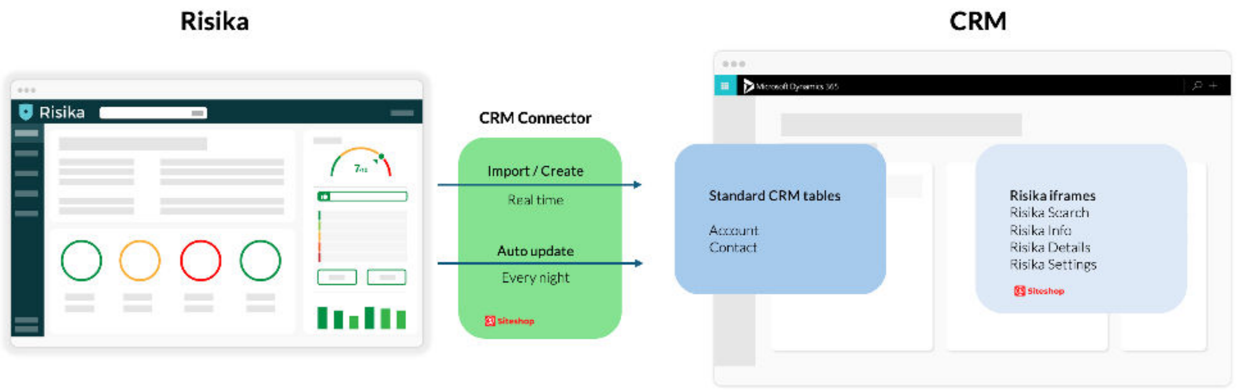
Introduction

The Risika CRM Connector (developed and maintained by Siteshop ApS) is a plug 'n play integration between Risika (company information database w. credit assessments) and Microsoft Dynamics 365 (CRM).

The integration can be used *as is* out of the box (see Illustration 1).

Out-of-the-box



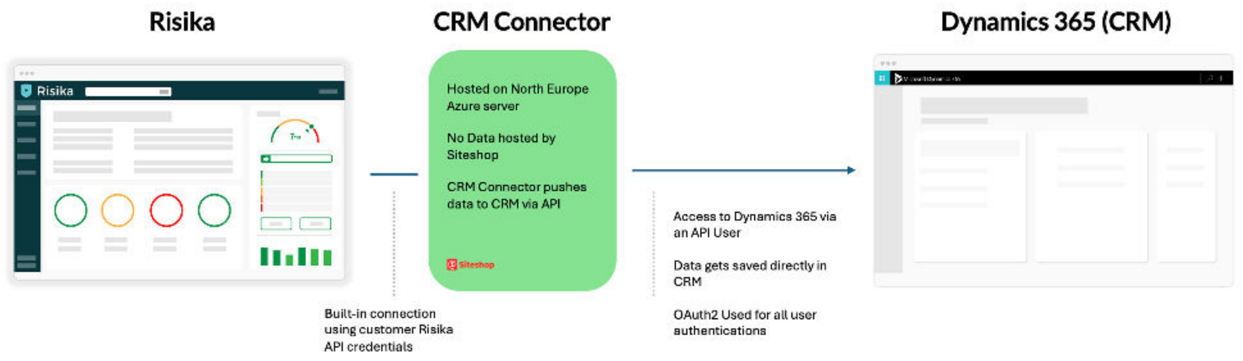
Examples / Use Cases

The goal for the integration is to make company data and credit assessments from Risika API available to users in CRM.

Risika CRM Connector offers these main features:

- Import new companies from Risika to CRM (including duplicate check)
- See real-time company details from Risika on each Account in CRM
- Auto-update selected company data from Risika to CRM every night

Architecture



High-level architectural details

- The CRM Connector has a built-in connection to Risika database via API (via the customer's Risika API credentials)
- The integration is hosted on a North Europe Azure Server
- No data is hosted by Siteshop
- CRM Connector pushes data to Dynamics 365 via API
- The CRM Connector gets access to Dynamics 365 via an API User (Dynamics: Application User, Salesforce: Integration User, SuperOffice: System User)
- Data gets saved directly in CRM
- OAuth2 Used for all user authentications

Data entities / objects

Risika CRM Connector does not add a new objects but uses existing bojects. This is where the Risika company data is transferred to and where they will receive automatic updates.

Standard CRM objects required in addition to utilize all features:

- Account
- Contact

The CRM users with active license and access to the Risika CRM Connector must have read/write access to the above-mentioned entities.

Security

Risika CRM Connector is a Microsoft certified app and available on the Microsoft Store. It uses the following security methods:

- Authentication
  - Offline access via API user using OAuth2 (Using scopes “user_impersonation”, “offline_access”)
  - User authentication to Iframes via OAuth2

- Authorization
  - The API user only has access to the data it is granted access to. That is completely configurable by the CRM admin

- Encryption:
  - Data in transit uses HTTPs and TLS 1.2
  - Data at rest (App configurations, and API Access) is stored only on the backend server, never on local machines. It is encrypted using AES256.

- The app is located on a Microsoft Azure server and is always kept up to date with the latest security advise from Microsoft.

- Siteshop is logging app usage. Only meta data is logged.

Data handling & Compliance

Risika CRM Connector provides a data transfer channel between Risika API and Dynamics 365. Siteshop does not store any data on behalf of the customer.

Siteshop CRM Connectors

- GDPR compliant and hosted in EU
- Uses the official CRM API’s for integration

Please see Subscription Agreement which includes complete GDPR and compliance information.

Integration & API details

The integration consists of following main components:

- Managed Solution
    - HTML resources (Risika Search, Risika Details, Risika Settings page)
    - Environmental variable (Only used for isolated instances)

The integration comes with a built-in connection to the Risika API and communicates with Microsoft Dynamics 365 through the Power Platform Dataverse Client.

Data safety
If a data transfer is not successful, we'll include the missing data in the next transfer.
Even in the case that we never register a transfer, every night we'll check for work to do.

Mappings
Every column in the custom table is populated with data from Risika.
On standard objects (Accounts, Contacts, Connections, Opportunities) we map a minimal number of fields. The app might need relaxed restrictions on creation of these objects. We do not support writing to your custom columns.

Api usage
When the app is not in use, it doesn't load the api. The app checks Risika for work to do every 5 minutes, when work is found, data is transferred to CRM one row at a time. CRM doesn't pull from Risika, the Siteshop backend is pushing data to CRM.

We'll only update projects that has been changed, so data transfers are kept at the minimal possible.

Required user rights

Installation requires a user(s) that can

- Making an “App registration” in Azure.
- Creating a “Application User”, and granting privileges in Power Platform.
- Editing the used Dynamics app in Power Apps

Billing through Microsoft Marketplace requires

You can order and pay for a license to RISIKA CRM Connector from Microsoft Store the same way that you order and pay your Microsoft Dynamics 365 licenses.

If your organization uses a Microsoft Customer Agreement (MCA) or Enterprise Agreement (EA):

- The Billing Administrator role alone is not sufficient to manage purchases or billing.
- You must be assigned specific billing roles at the billing account or billing profile level, such as:
  - Billing Account Owner
  - Billing Account Contributor
  - Billing Profile Owner
  - Invoice Manager (for invoice payments)

App users require

- To be impersonated through api (is default in all Dynamics)

The API user require:

- Same rights as Sales person

Installation / Activation

Installation is simple and can be done by your CRM-admin or CRM-partner.

Installation is initiated from the RISIKA CRM Connector app entry on Microsoft Store: https://marketplace.microsoft.com/nb-no/product/siteshopaps1619439466992.riskcreditv1

Purchase and billing for the annual subscription must be registered here as well.

Configuration depends on your setup. A standard configuration can be seen in this guide for inspiration: https://siteshop.eu/risika-risk-credit-form-and-fields-in-microsoft-dynamics-365/

Pre-requisites

- Risika API Credentials

It is possible to install the app on up to 2 Dev/Test/QA/UAT environments with no extra charge before installing in the production environment.

Once the installation is done the Risika CRM Connector must be configured/activated by your CRM-admin or CRM-partner. Any questions about the installation can be sent to support@siteshop.dk

Operations / Monitoring

After *go-live* the Siteshop operations team is activated and will monitor the status of the integration pro-actively. Any issues will be reported to the customer's admin.

Operations will automatically perform needed updates of the CRM Connector when available outside of working hours.

Support & Responsibility Model

Basic hotline support for Siteshop CRM Connectors is included in the annual price during office hours as follows:

Monday - Thursday: 9.00 - 16.00
Friday: 9.00 – 15.00
E-mail: support@siteshop.dk