

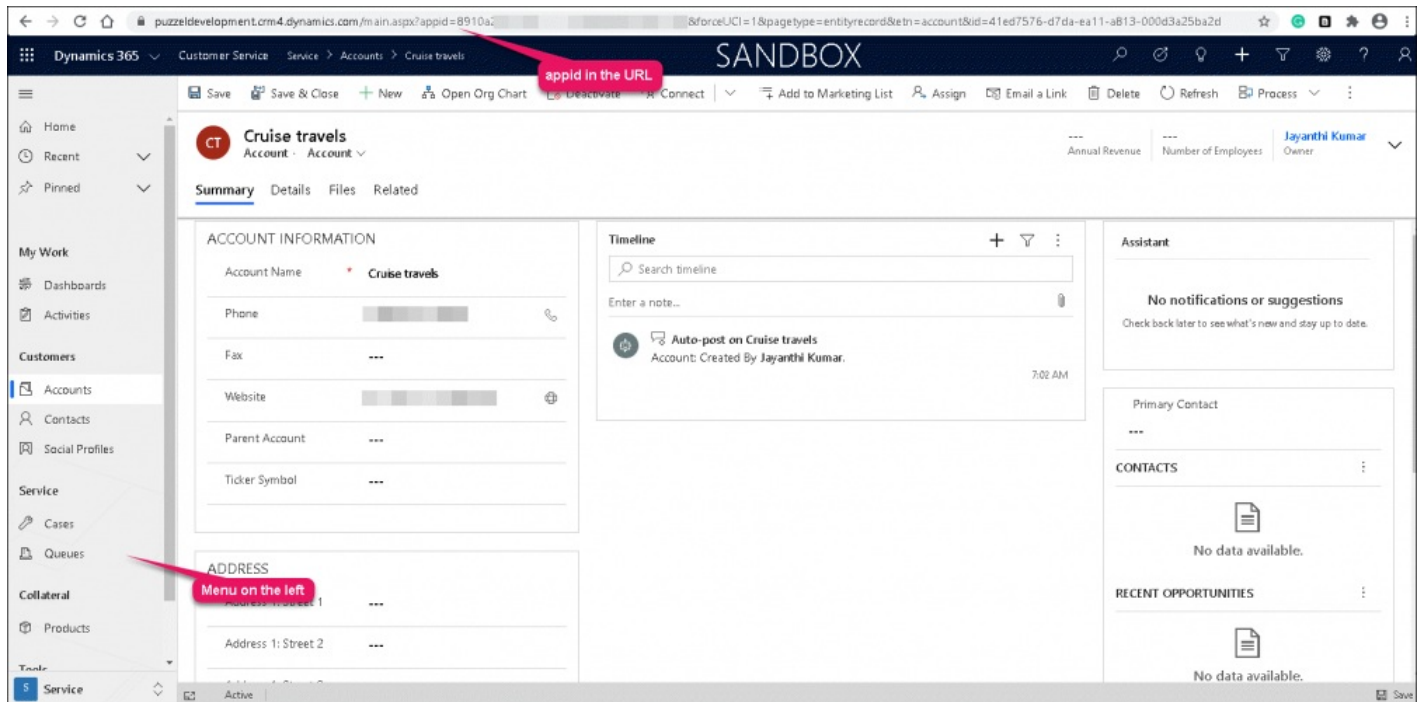
Prerequisites

Prerequisites needed for the CRM Widget to function properly are as listed below:

- Microsoft Dynamics Online (version 9)
- Microsoft Azure Active Directory [AD]

Only Unified Interface in Dynamics online must be used for a successful integration. For more details on enabling the Unified Interface functionality refer to, <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/enable-unified-interface-only>

When the Unified Interface is enabled, your Dynamics interface will change to look like in the picture below



Note

The menu will be seen on the left and the AppID will be displayed in the URL.