

# Alchemer Workflow Microsoft Dynamics Initiator

The Microsoft Dynamics 365 initiator is available for purchase as an add-on. If you are interested in purchasing, please [contact us](#) for additional information.

## Overview

Microsoft Dynamics 365 is a set of enterprise accounting and sales software products. This initiator combines advanced survey and Workflow capabilities with Microsoft's powerful CRM platform, allowing you to automate business and sales processes and better close the loop with your customers and prospects.

Initiating Workflows in response to event changes leads to smoother customer and prospect engagement, while speeding up your sales and business processes.

With the Dynamics Initiator, you can initiate Workflows in Alchemer whenever:

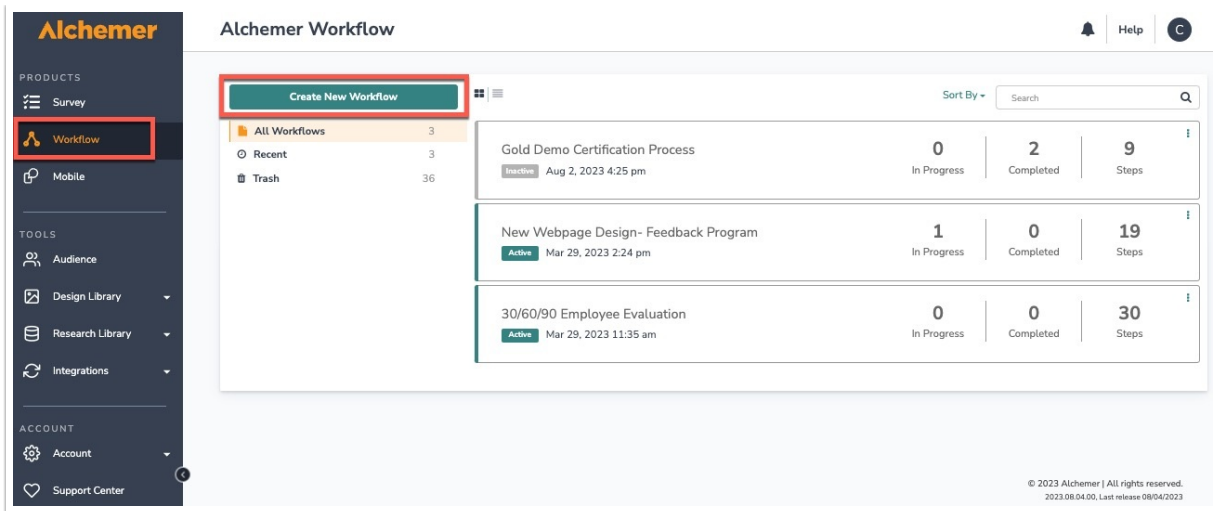
- An opportunity is updated in Dynamics. [Jump to section.](#)
- Custom events occur in Dynamics, using a Custom Power Automate Webhook. [Jump to section.](#)
- If this initiator doesn't fit your needs, [please let us know!](#)

The Microsoft Dynamics 365 initiator uses Power Automate. Refer to [Microsoft's Power Automate documentation](#) for additional guidance.

## Setup

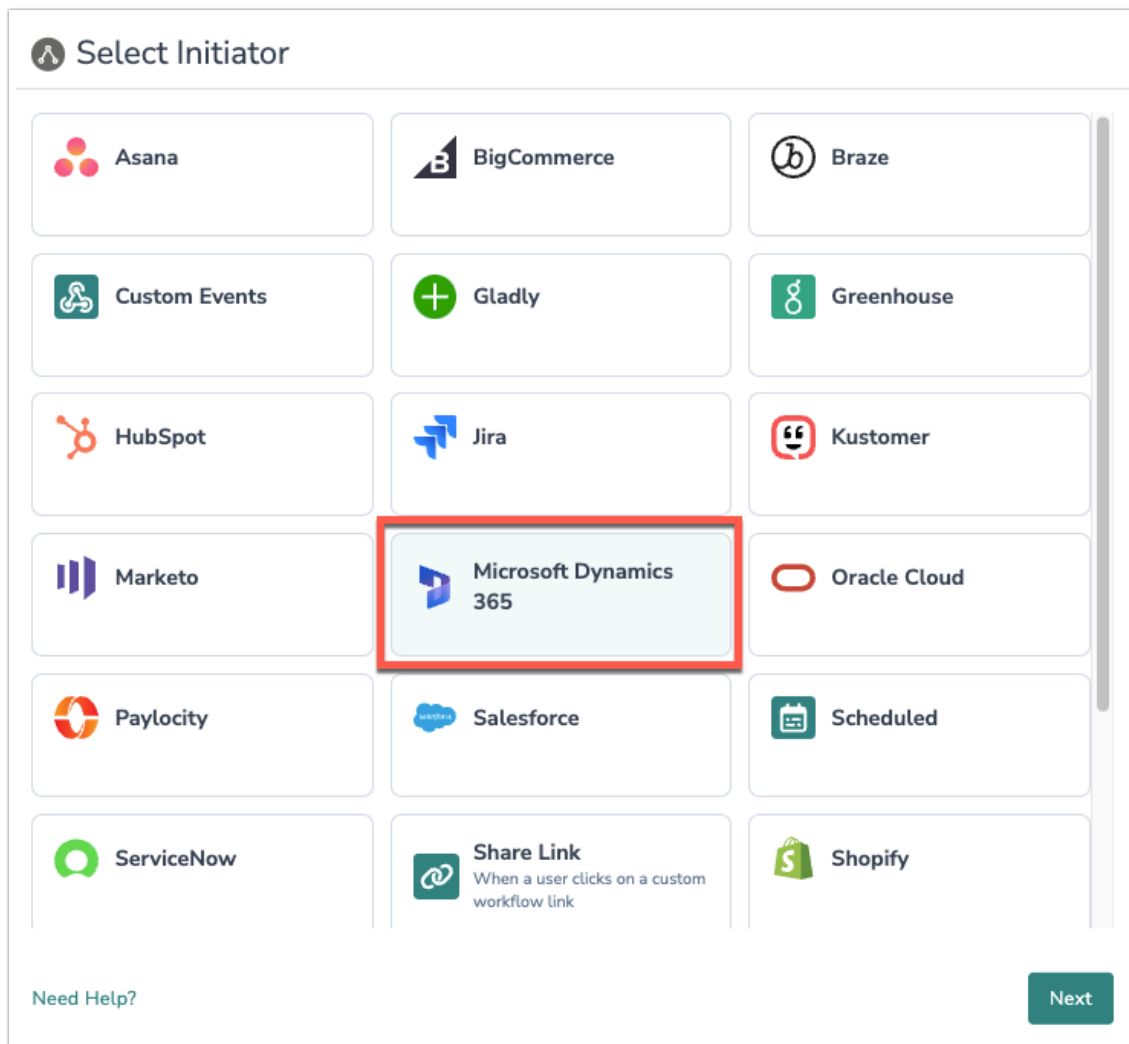
### Opportunity Updated

1. Create a new Workflow.
-



2. Name the new Workflow.

3. Select Microsoft Dynamics 365 as your Workflow initiator.



4. Select Opportunity Updated as the event you want to initiate a Workflow off of.

## Select Action

**Opportunity updated**  
Start a new Workflow when an opportunity is updated in Microsoft Dynamics.

**Custom Power Automate Webhook**  
Start the Alchemer Workflow from an outbound HTTP webhook call from Power Automate.


[Need Help?](#) [Previous](#) [Next](#)

5. Click "Next" on the initiator overview screen.

## Configure Initiator

### Microsoft Dynamics | Opportunity updated

Start a new Workflow when an opportunity is updated in Microsoft Dynamics.

 Proceed to the next step to configure your initiator.

[Previous](#) [Next](#)

6. Select "New Authentication"

## Configure Initiator

Microsoft Dynamics | Opportunity updated

### Authentication

Add the Microsoft Dynamics 365 authentication you wish to use

 New authentication

Previous

Next

7. Name your new authentication then provide your Microsoft Dynamics 365 URL. When complete, click "Create".

Provide the full URL to your Microsoft Dynamics 365 instance. Example:

`https://alchemer.crm11.dynamics.com`

## Create a new authentication ✕

Your authentication name

Microsoft Dynamics 365 URL\* ?

No value

Microsoft Dynamics 365 URL is required

Previous

Create

8. Copy the Webhook URL, you will need this URL to configure the Webhook on the Microsoft side. Click "Save" and then go to your Microsoft Dynamics account.

## Configure Initiator

Microsoft Dynamics | Opportunity updated

### Webhook URL

Webhook Url

`https://2490x50-6b9b-4019-9aa0-d454864f17a@trayapp.io`

- Setup an outbound HTTP call to this webhook URL in Power Automate for Dynamics
- Set the method as POST
- Set the body to send the opportunity ID in a JSON object with a key of 'opportunityId'

[Learn more](#)

### Fields

Opportunity, Customer, and Account fields are automatically available for use in your Workflow. Use these fields in merge codes, logic, email invites, etc. in your Workflow.

Previous

Save

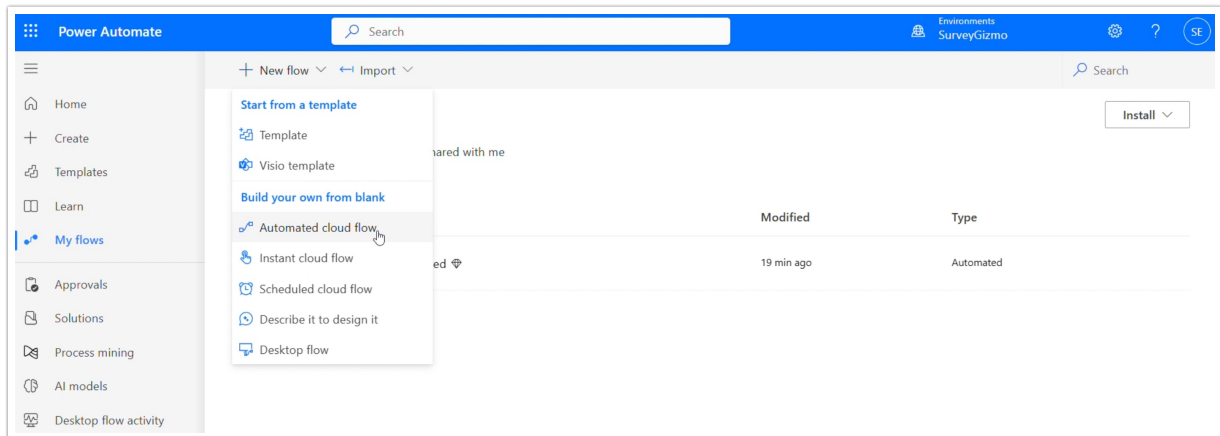
9. In Microsoft Dynamics 365, create a new Power Automate Flow.

For this Alchemer Workflow initiator, you will use Power Automate flows in conjunction with Microsoft Dataverse connectors. Refer to the following documentation for additional guidance:

- [Overview of how to integrate Power Automate flows with Dataverse](#)
- [Trigger flows when a row is added, modified, or deleted](#)

The screenshot displays the Microsoft Dynamics 365 user interface. The main content area shows a workflow configuration for an Opportunity record titled "Test opportunity 1-15". The workflow is currently in the "Qualify" stage, with a "Propose" stage visible next. A red box highlights a context menu that appears over the workflow, containing the following options: "Back", "Manage", "Create a flow", and "See your flows". The left-hand navigation pane shows the "Sales" module selected. The top navigation bar includes the "Dynamics 365" logo and a search bar. The bottom of the screen shows a "Recent" activity feed with an entry for "Auto-post on Opportunity Test opportunity 1-13" dated 12/4/2023, 9:28 AM.

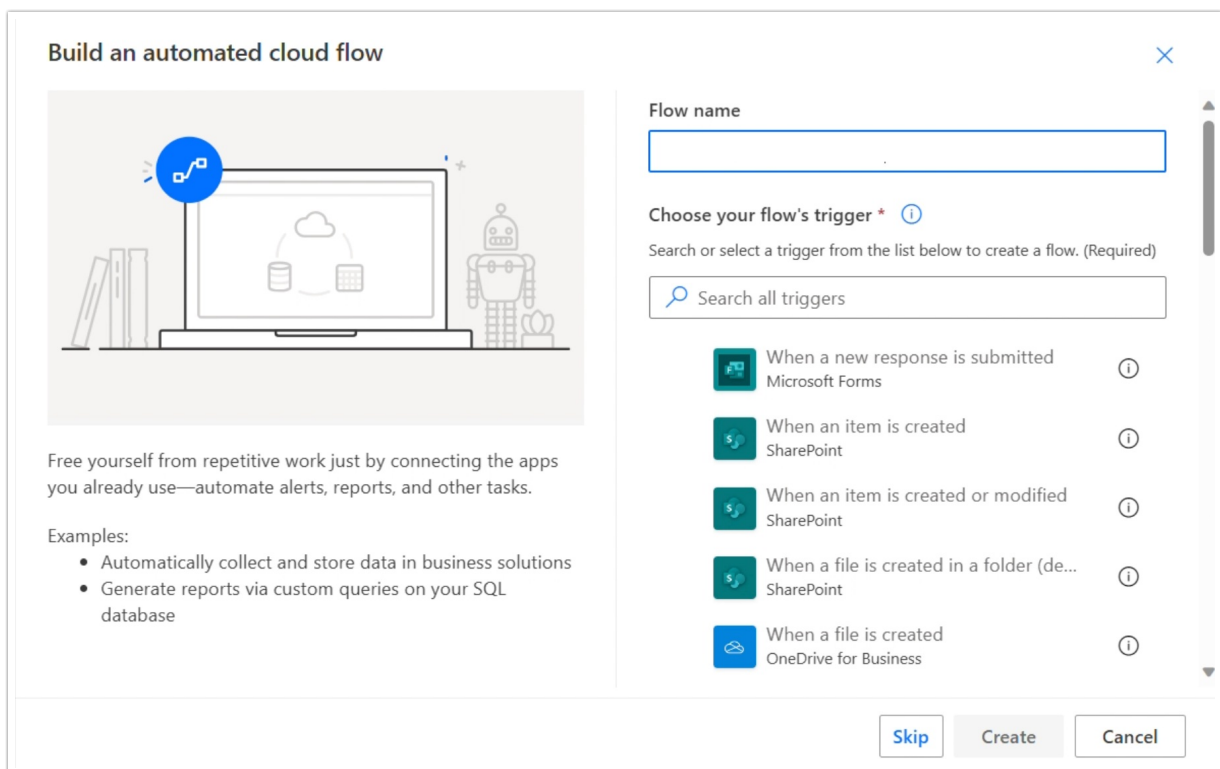
10. In the My Flows tab, select "Automated cloud flow."



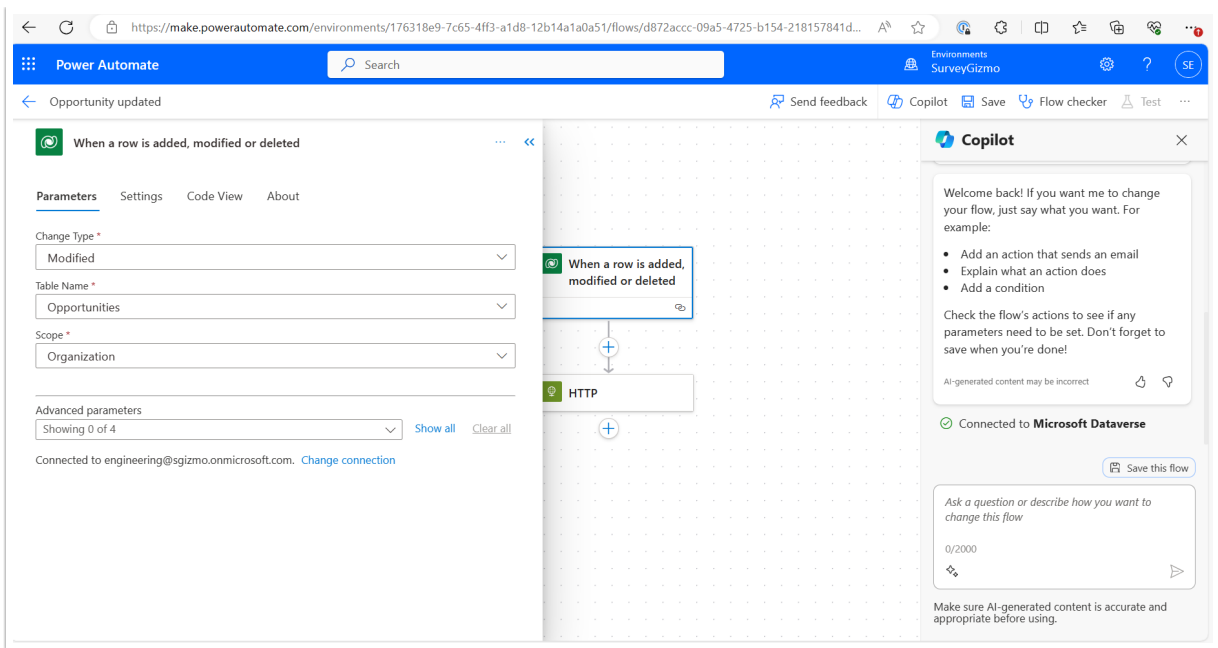
10. Add a trigger to your flow. For the Opportunity Updated initiator, you will use one of the triggers provided by Microsoft Dataverse connector, "When a row is added, modified or deleted".

In the search bar below, search Dataverse and select "When a row is added, modified or deleted".

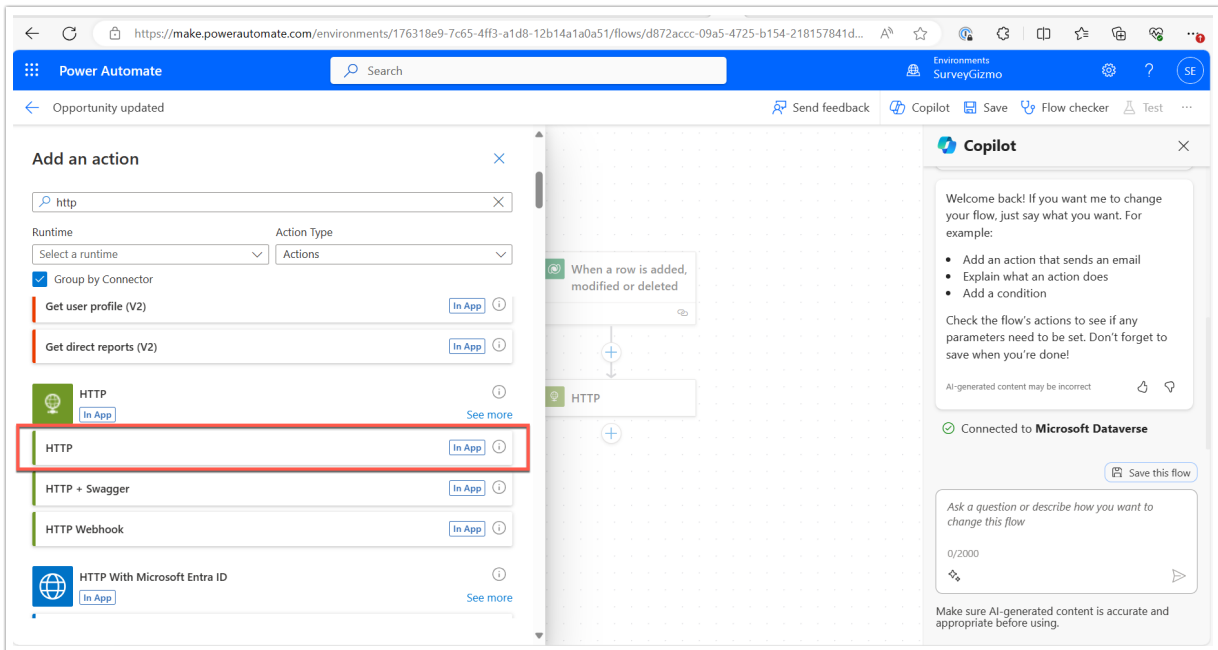
For additional guidance on setting up the triggers provided by the Microsoft Dataverse connector, [refer to Microsoft's documentation](#).



11. Click on your new trigger and navigate to the Parameters tab. See the image below for what the parameters might look like for an opportunity updated trigger.



12. With the trigger complete, define the action in your flow. In this example, we want to use an outbound HTTP action to call the webhook URL provided by Alchemer. When called, the Workflow in Alchemer will initiate.



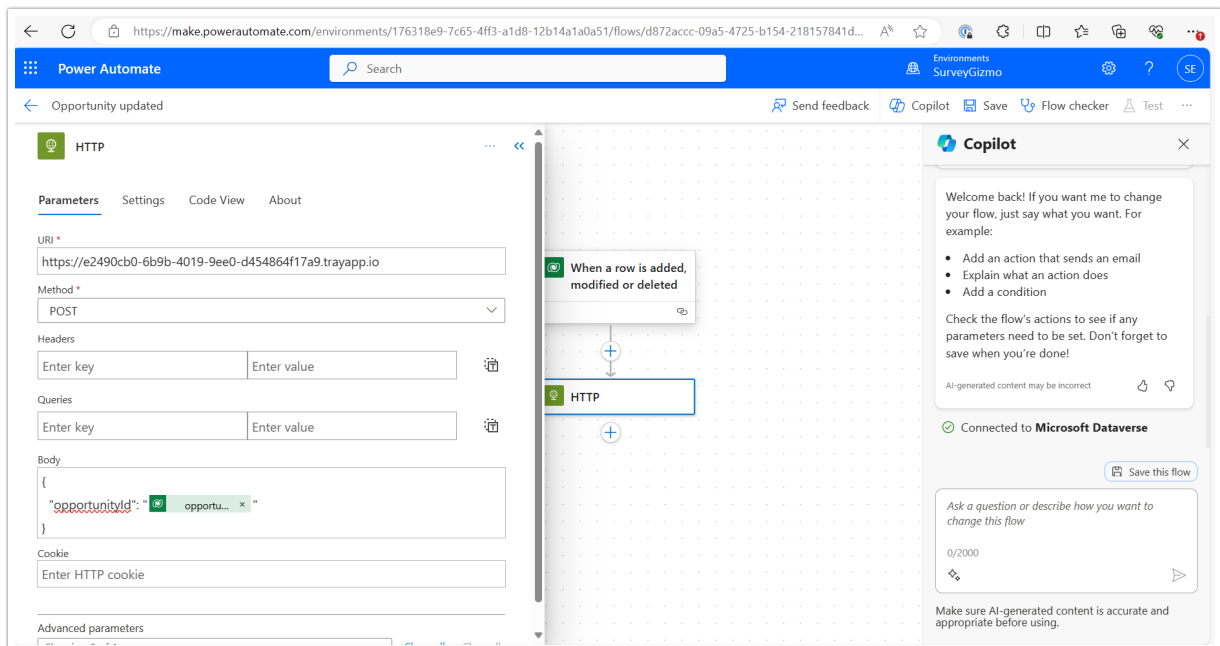
13. In the HTTP action parameters, complete the following items:

- Paste the Webhook URL provided by Alchemer into the URL field.
- Set the method to POST
- Set the Body to send the opportunity ID in a JSON object with a key for 'opportunityID'.

Click "Save" when complete.

To complete this step, you send field in the body named 'opportunityId' that passes the

opportunity ID from Microsoft Dynamics. Use the field selector to add the field from Dynamics to the body.



14. Return to Alchemer Workflow, and click "Save" to complete the Opportunity Updated initiator.

### Merge Codes - Opportunity Updated Webhook

When the webhook fires, Microsoft Dynamics 365 will pass the following fields to Alchemer Workflow. After configuring this initiator, you can use these fields in merge codes, logic, and other Workflow features.

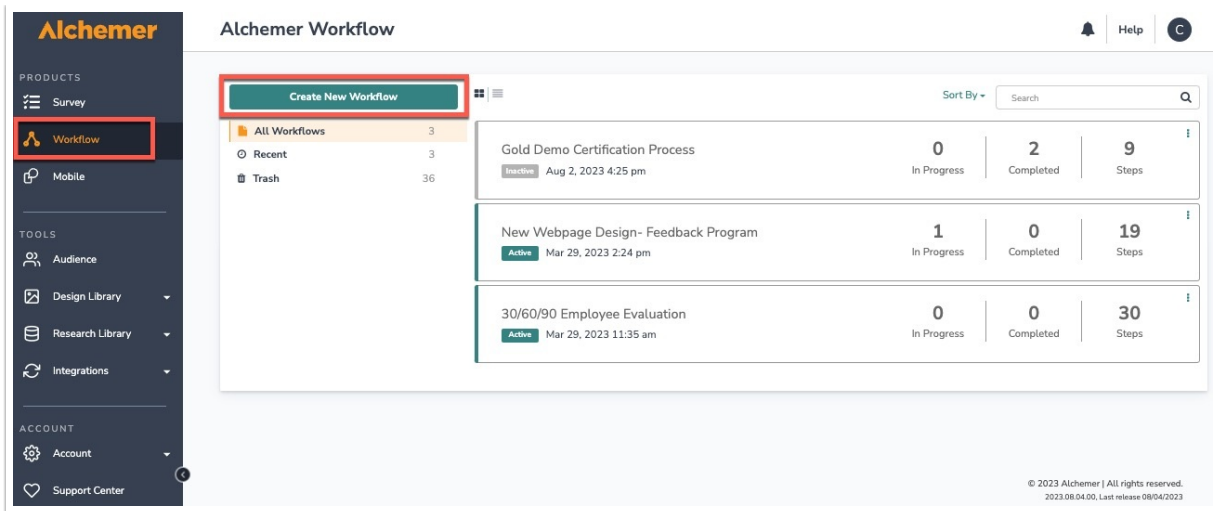
For more information on how to use these merge codes in your Workflow, [check out this article](#).

### + Fields for Jira initiator - Issue Webhook

## Custom Power Automate Webhook

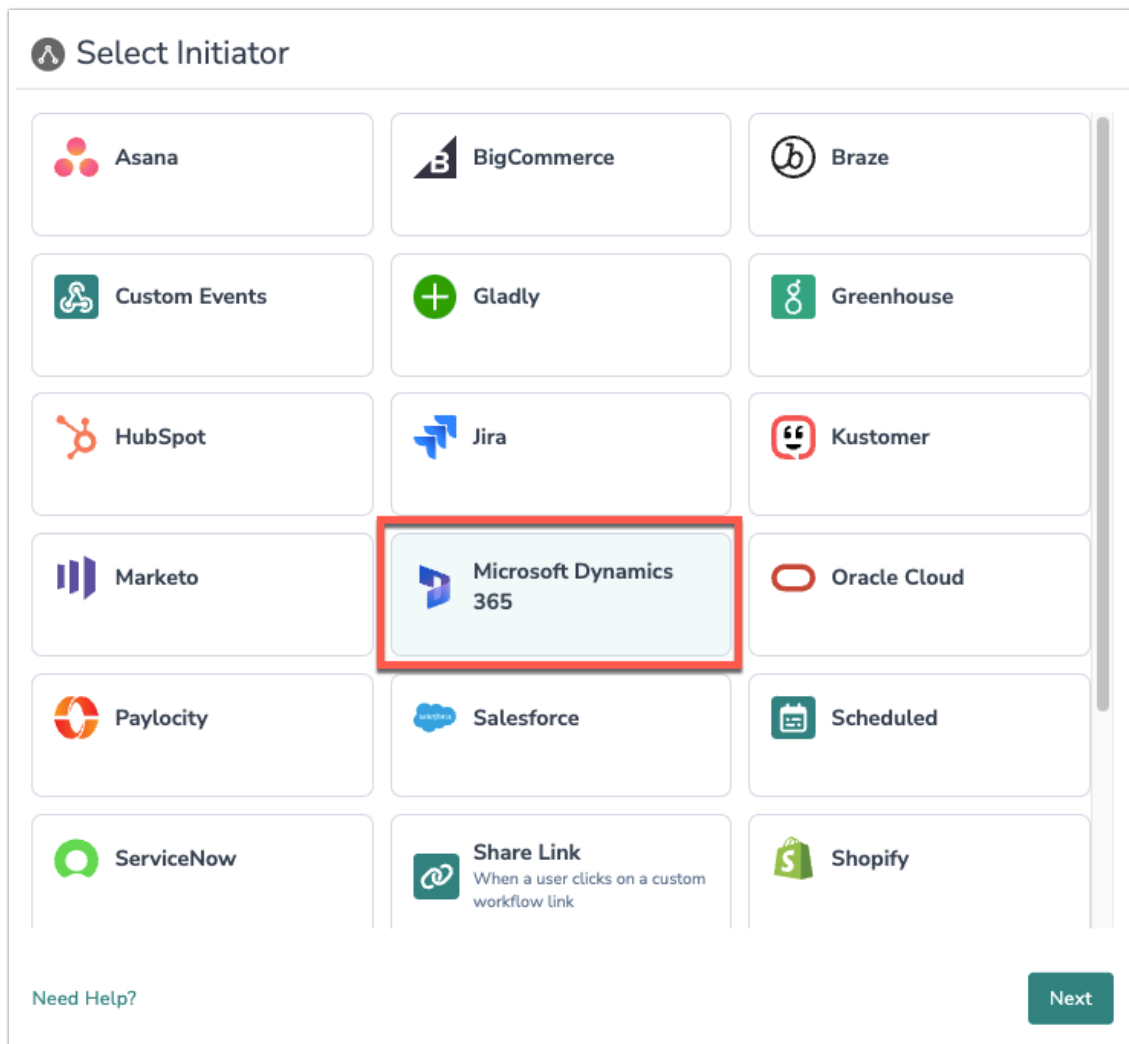
1. Create a new Workflow.





2. Name the new Workflow.

3. Select Microsoft Dynamics 365 as your Workflow initiator.



4. Select "Customer Power Automate Webhook" and then click "Next".

## Select Action

**Opportunity updated**  
Start a new Workflow when an opportunity is updated in Microsoft Dynamics.

**Custom Power Automate Webhook**  
Start the Alchemer Workflow from an outbound HTTP webhook call from Power Automate.


[Need Help?](#) [Previous](#) [Next](#)

5. Click "Next" on the initiator overview screen

## Configure Initiator

Dynamics | Custom Webhook

Start a new Workflow run when a webhook is fired from Power Automate.

 Proceed to the next step to configure your initiator.

[Previous](#) [Next](#)

6. Copy the Webhook URL, you will need this URL to configure the Webhook on the Microsoft side. Click "Save" and then open your Microsoft Dynamics account.

## Configure Initiator

### Dynamics | Custom Webhook

#### Webhook URL

In Power Automate:

- Add an HTTP step to your desired workflow
- Select POST or GET as the method
- Add fields you want to pass to the Alchemer Workflow as query parameters or in the body as JSON for POST requests
- Configure the Custom Fields below to match the field keys

[Learn more](#)

#### Webhook URL

https://1074c219-dc33-403c-83ee-50872e79d100.trayapp.io

#### Custom Fields

Add Custom Fields to define the fields this webhook should accept. Field names must match those that are passed.

#### Custom Fields *(optional)*

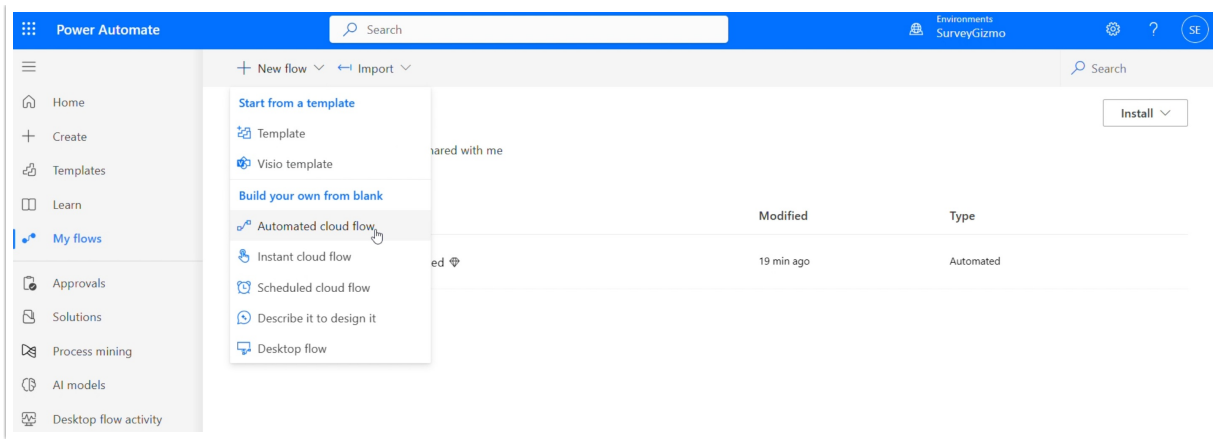
Previous

Save

7. In Microsoft Dynamics 365, create a new Power Automate flow or modify an existing flow.

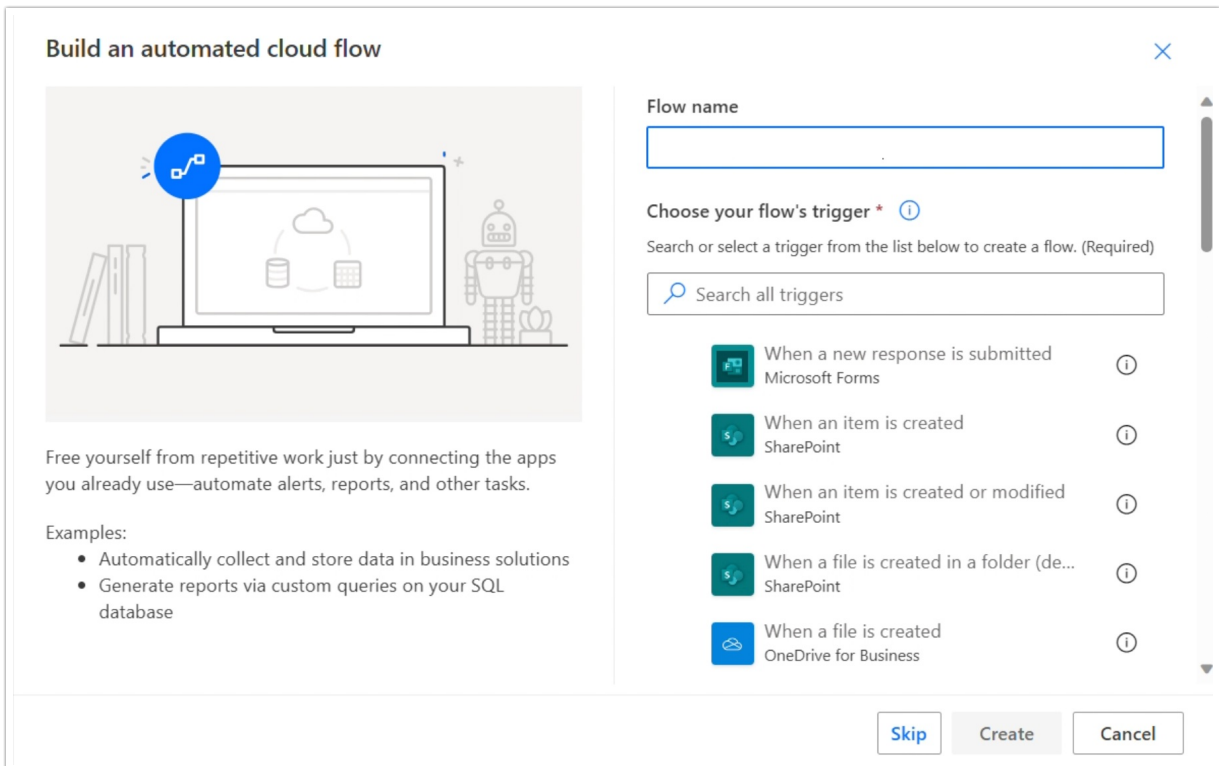
The screenshot displays the Microsoft Dynamics 365 interface for configuring a Power Automate flow. The main window shows a flow named "Test opportunity 1-15" with three steps: "Qualify", "Propose", and "Close". A context menu is open over the "Propose" step, showing options: "Back", "Manage", "Create a flow", and "See your flows". The "Manage" option is highlighted. The interface also shows a sidebar with navigation options like "Home", "Recent", "Pinned", "My Work", "Dashboards", "Activities", "Customers", "Sales", and "Collateral". The "Sales" section is expanded, showing "Leads", "Opportunities", and "Competitors". The "Opportunities" section is selected, showing details for "Test opportunity 1-15" including contact information for Justin Falk and a budget amount of US Dollar.

8. In the My Flows tab, select "Automated cloud flow."

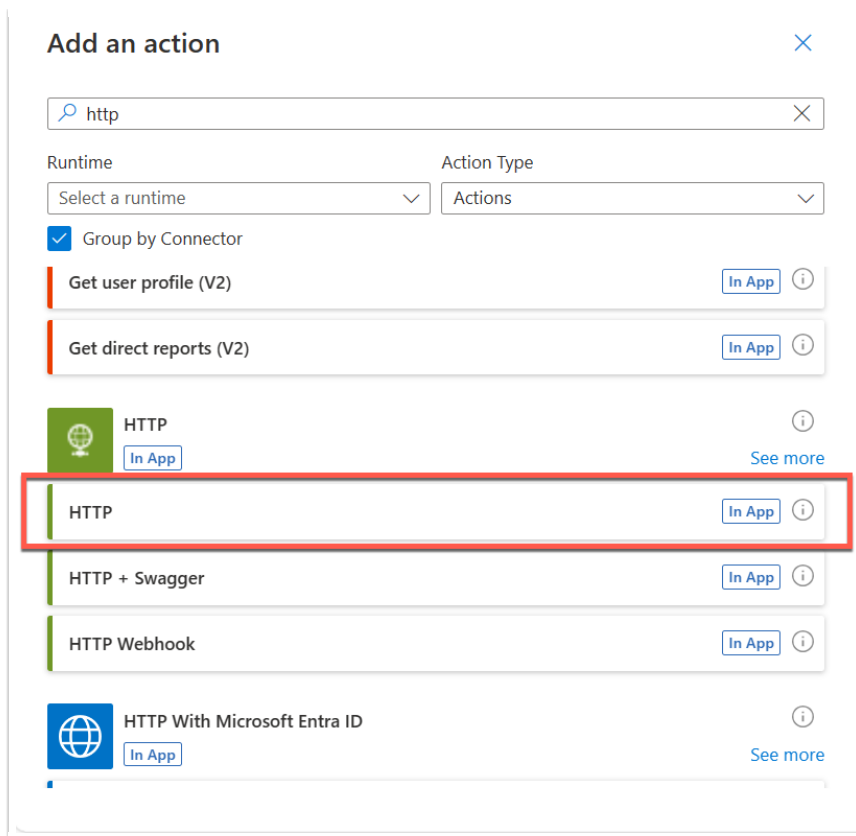


9. Name your flow and choose the flow's trigger. Then complete configuration for your chosen flow trigger.

For additional information on the available Power Automate flow triggers, refer to [Microsoft's documentation](#).



10. With the trigger complete, define the action in your flow. In this example, we want to use an outbound **HTTP action** to call the webhook URL provided by Alchemer. When called, the Workflow in Alchemer will initiate.



11. In the HTTP action parameters, complete the following items:

- Paste the Webhook URL provided by Alchemer into the URL field.
- Select POST or GET as the method.
- Add fields that you want Dynamics to pass to the Alchemer Workflow, as query parameters or in the body as JSON.

Click "Save" when complete.

← Alchemer custom webhook

**Parameters** Settings Code View About

URI \*

Method \*

Headers  

Enter key	Enter value	
-----------	-------------	--

Queries  

Enter key	Enter value	
-----------	-------------	--

Body  

```
{  
  "email":  Email Ad... × ,  
  "name":  Created ... ×  
}
```

Cookie

Advanced parameters  
 [Show all](#) [Clear all](#)

12. Return to Alchemer Workflow, and define what Custom Fields Alchemer should accept.

The Custom Field names in Alchemer must match exactly the field keys added as query parameters or in the body as JSON.

## Configure Initiator

Webhook URL

https://...trayapp.io

### Custom Fields

Add Custom Fields to define the fields this webhook should accept. Field names must match those that are passed.

Custom Fields *(optional)*

0

email

1

name

Add to Custom Fields

Previous

Save

13. Click "Save" to complete the initiator.

### Merge Codes - Custom Power Automate Webhook

When the webhook fires, Microsoft Dynamics 365 will pass any custom fields, you defined, to Alchemer Workflow. After configuring this initiator, you can use these fields in merge codes, logic, and other Workflow features.

For more information on how to use these merge codes in your Workflow, [check out this article](#).

## FAQs

▶ What permissions do I need within Alchemer to set-up and use the Microsoft Dynamics initiator?

▶ This initiator doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!

Related Articles