

Alchemer Workflow Microsoft Dynamics Initiator

The Microsoft Dynamics 365 initiator is included with Alchemer Workflow. If you are interested in purchasing Alchemer Workflow, 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:

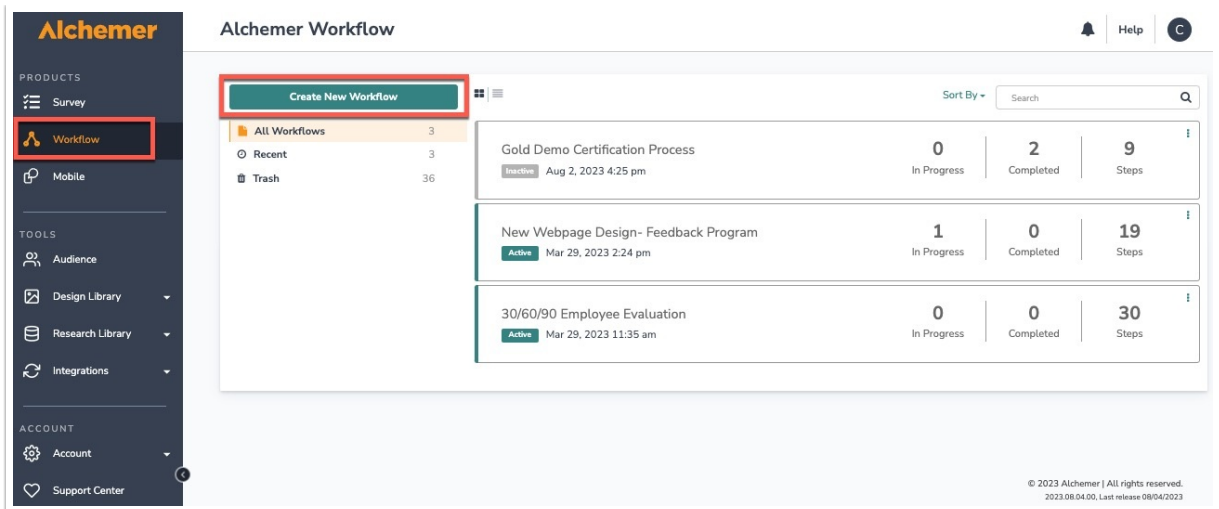
- An opportunity is updated in Dynamics. [Jump to section.](#)
- Custom events occur in Dynamics, using a Custom Power Automate Webhook. [Jump to section.](#)
- If this initiator doesn't fit your needs, [please let us know!](#)

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

Setup

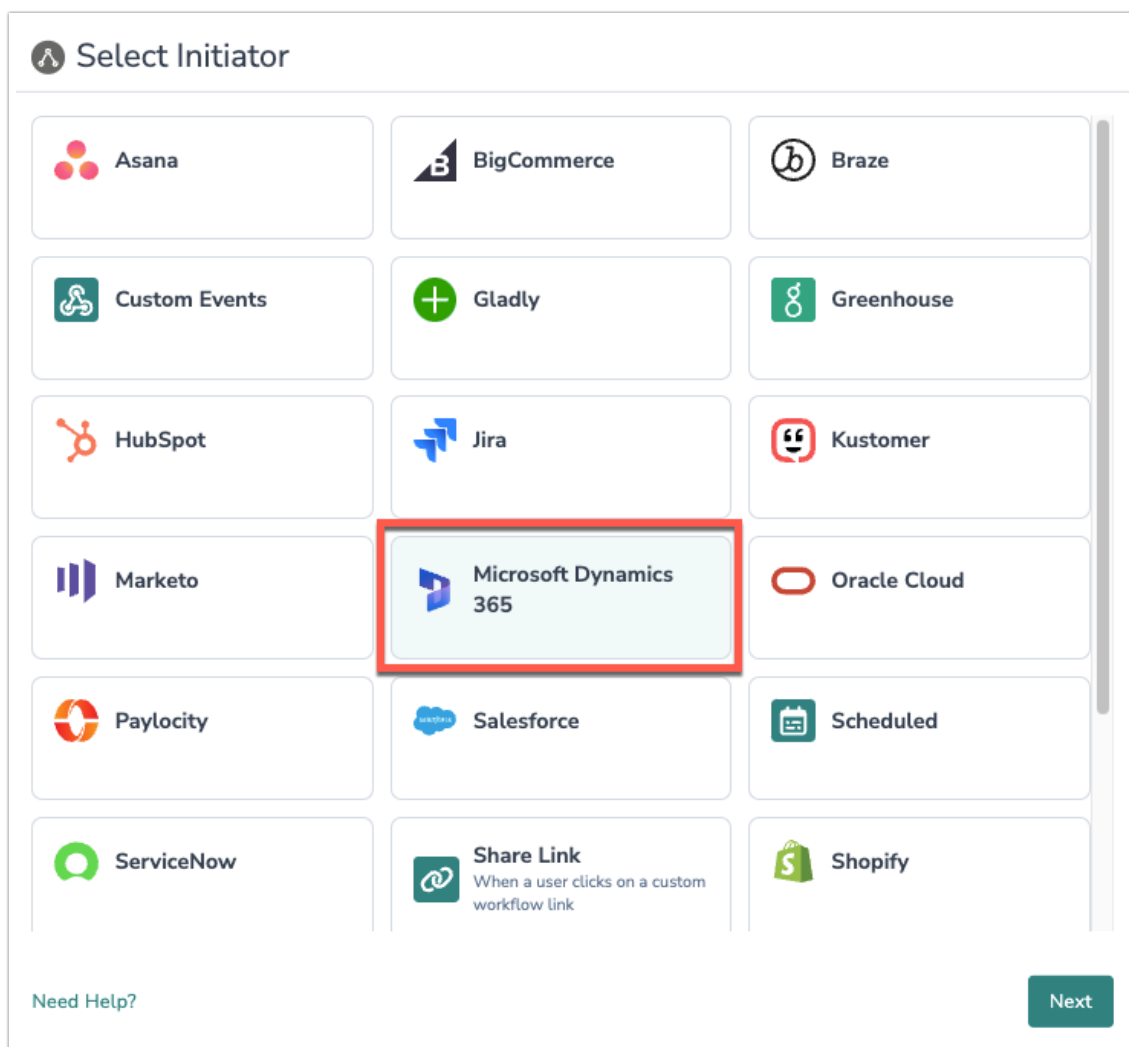
Opportunity Updated

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://2490x50-6b7b-4019-9aa0-d454864f17a9.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

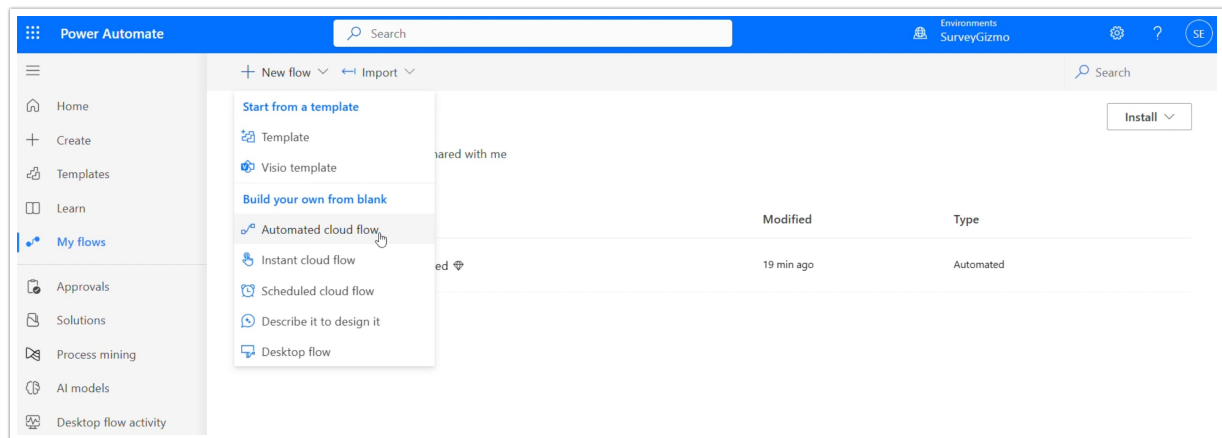
9. In Microsoft Dynamics 365, create a new Power Automate Flow.

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 top navigation bar shows 'Dynamics 365' and 'Dynamics 365 — custom'. The main content area is titled 'Test opportunity 1-15 - Saved' and shows a workflow progress bar with steps: 'Project Service - Opport...', 'Quality', 'Propose', and 'Close'. A red box highlights a dropdown menu that appears when clicking on the 'Propose' step, containing the following options: 'Back', 'Manage', 'Create a flow', and 'See your flows'. The left sidebar contains navigation links for 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Customers', 'Accounts', 'Contacts', 'Sales', 'Leads', 'Opportunities', 'Competitors', and 'Collateral'. The bottom section of the interface shows 'Key details' for the opportunity, including 'Contact: Justin Falk', 'Budget amount', 'Currency: US Dollar', and 'Purchase timeframe'. The 'Up next' section shows a 'Manage your activities' card with 'Connect sequence' and 'Create activity' buttons. The 'Timeline' section shows a recent activity: 'Auto-post on Opportunity Test opportunity 1-13: 12/4/2023, 9:28 AM'. The 'Assistant' section shows 'No notifications or suggestions' and a list of 'People' including 'Justin Falk' as a stakeholder.

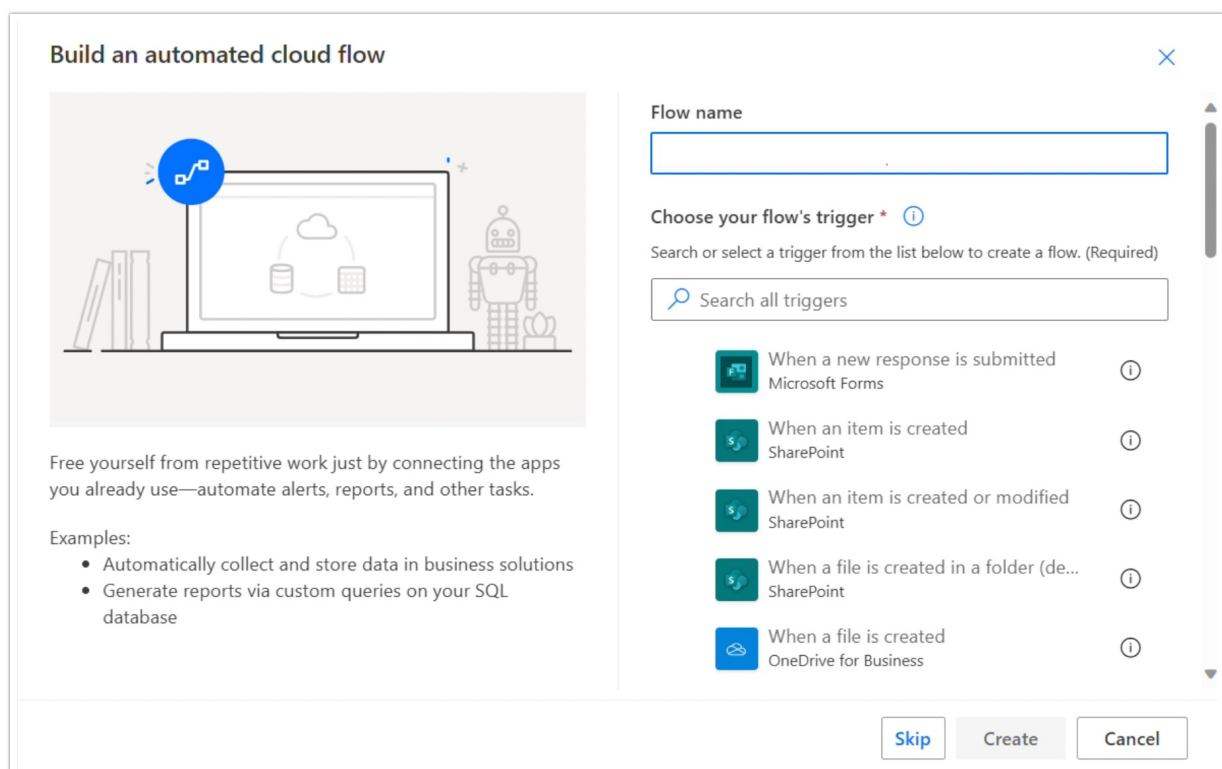
10. In the My Flows tab, select "Automated cloud flow."



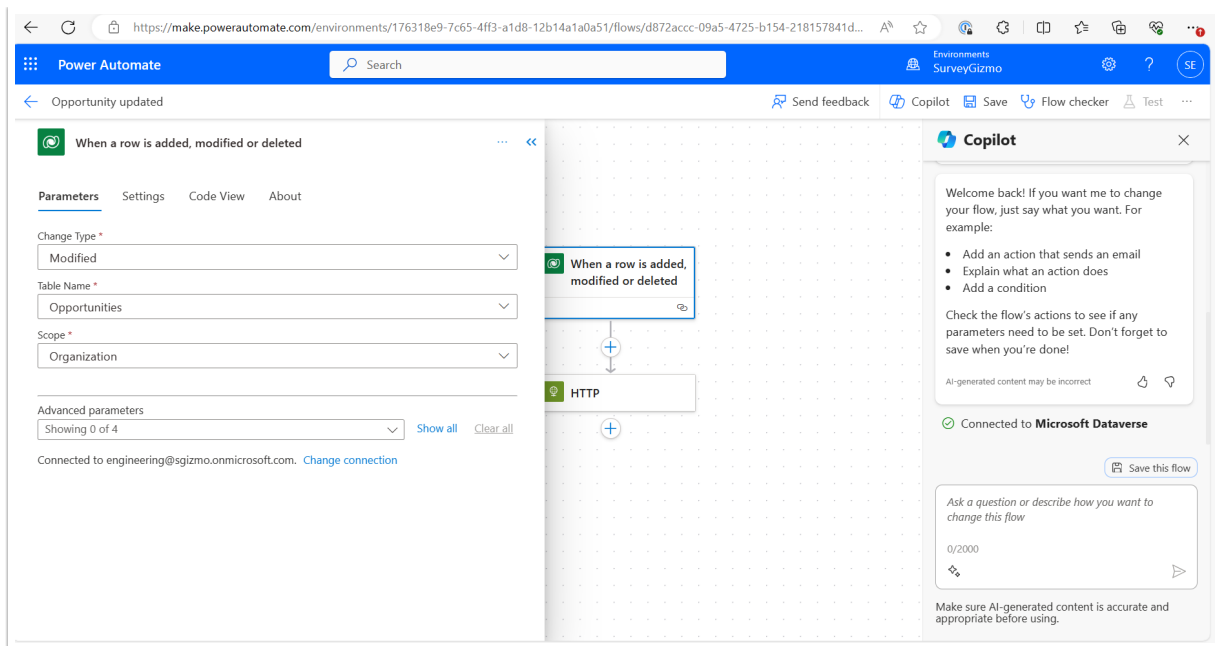
10. Add a trigger to your flow. For the Opportunity Updated initiator, you will use one of the triggers provided by Microsoft Dataverse connector, "When a row is added, modified or deleted".

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

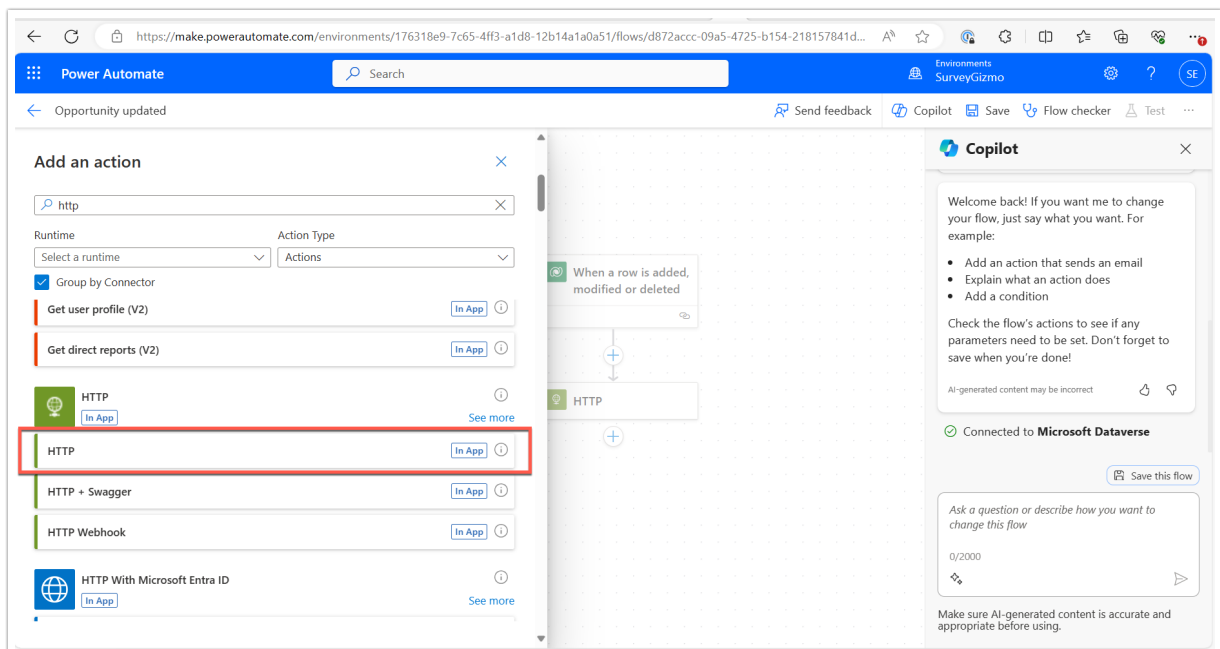
For additional guidance on setting up the triggers provided by the Microsoft Dataverse connector, [refer to Microsoft's documentation](#).



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.



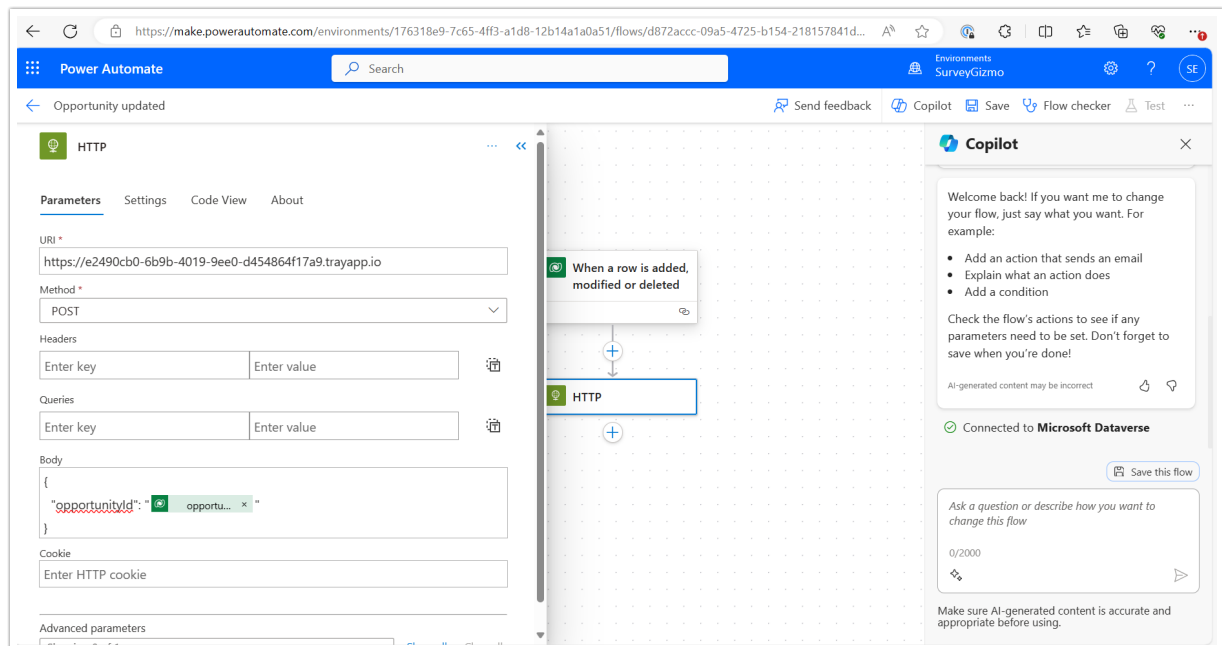
13. In the HTTP action parameters, complete the following items:

- 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

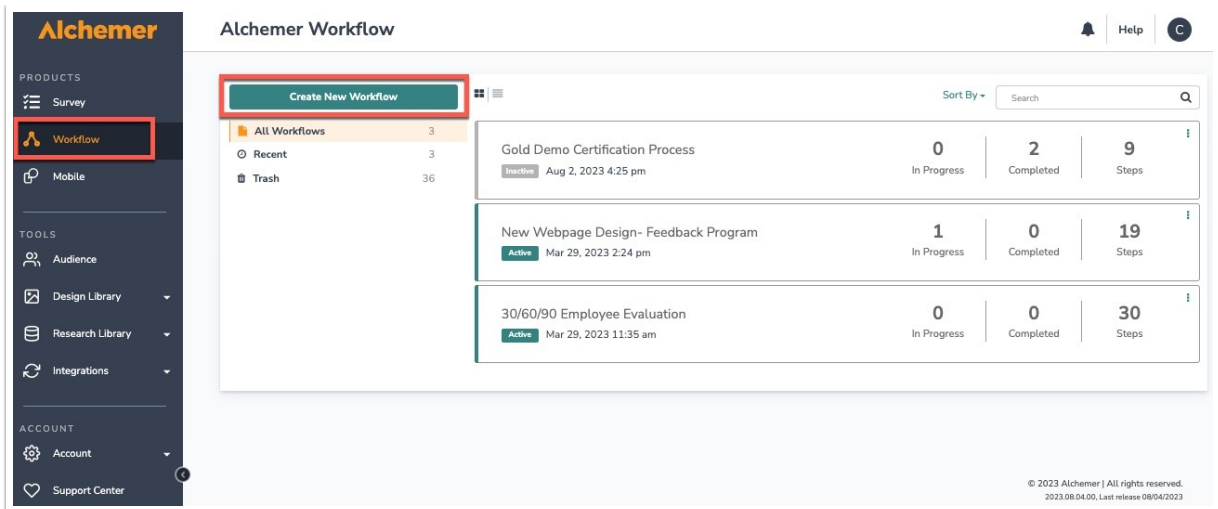
When the webhook fires, Microsoft Dynamics 365 will pass the following fields to Alchemer Workflow. After configuring this initiator, you can use these fields in merge codes, logic, and other Workflow features.

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

+ Fields for Jira initiator - Issue Webhook

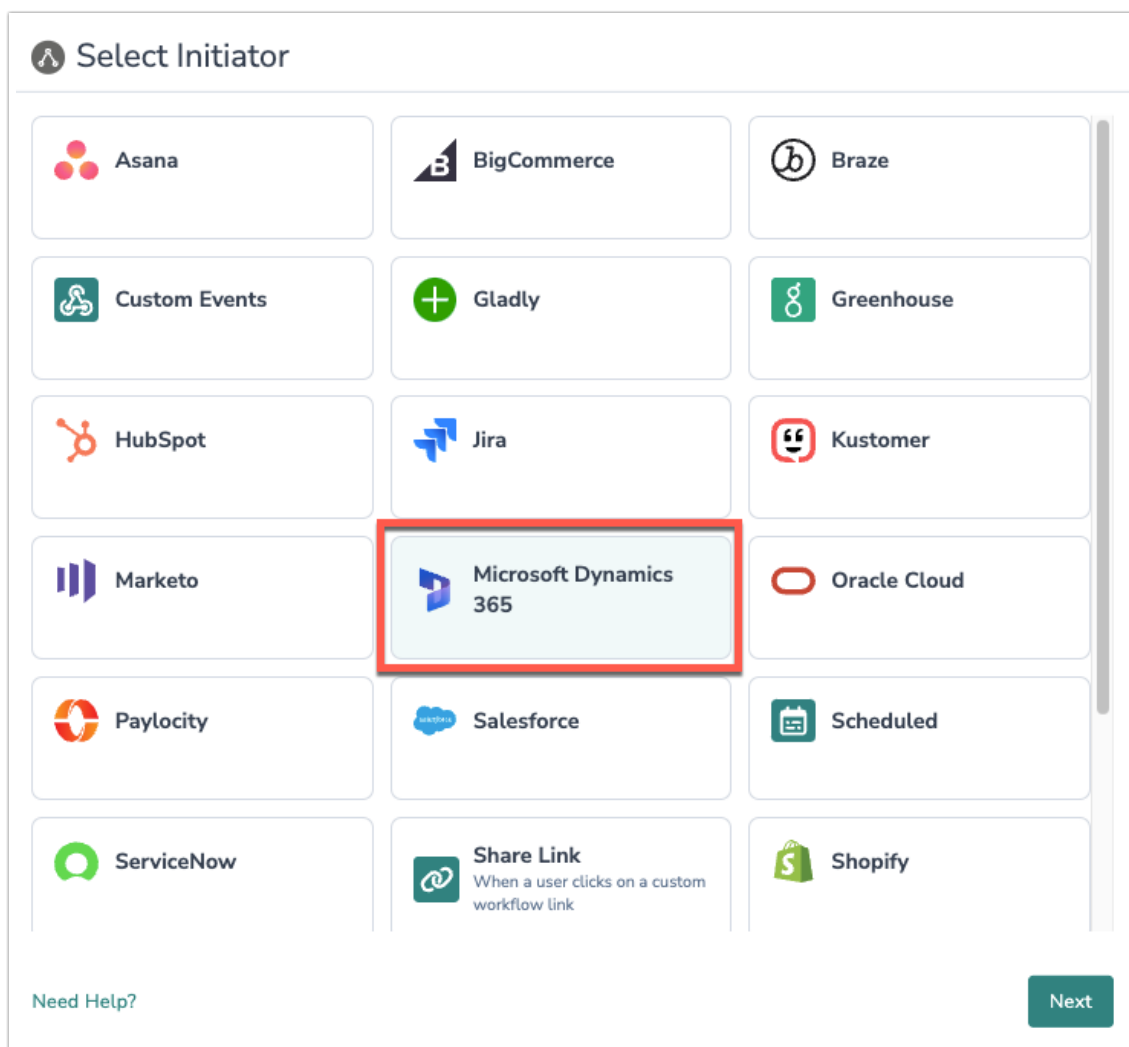
Custom Power Automate Webhook

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://0574c219-dc33-403c-83ee-50872e79d100.trayapp.io



Custom Fields

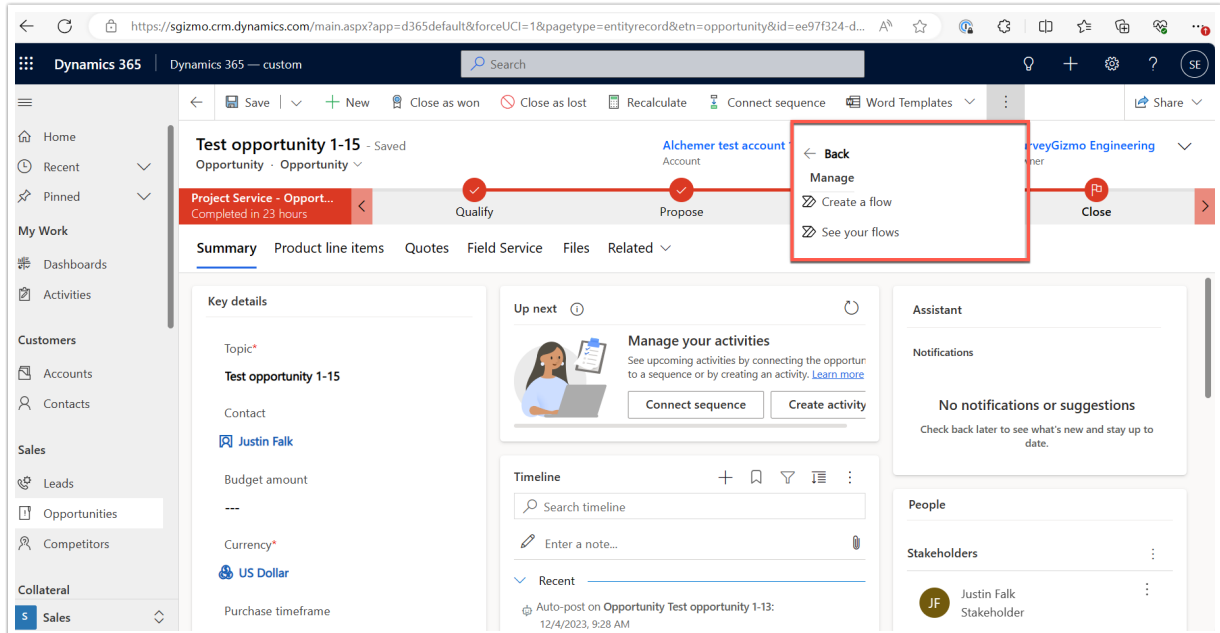
Add Custom Fields to define the fields this webhook should accept. Field names must match those that are passed.

Custom Fields *(optional)*

Previous

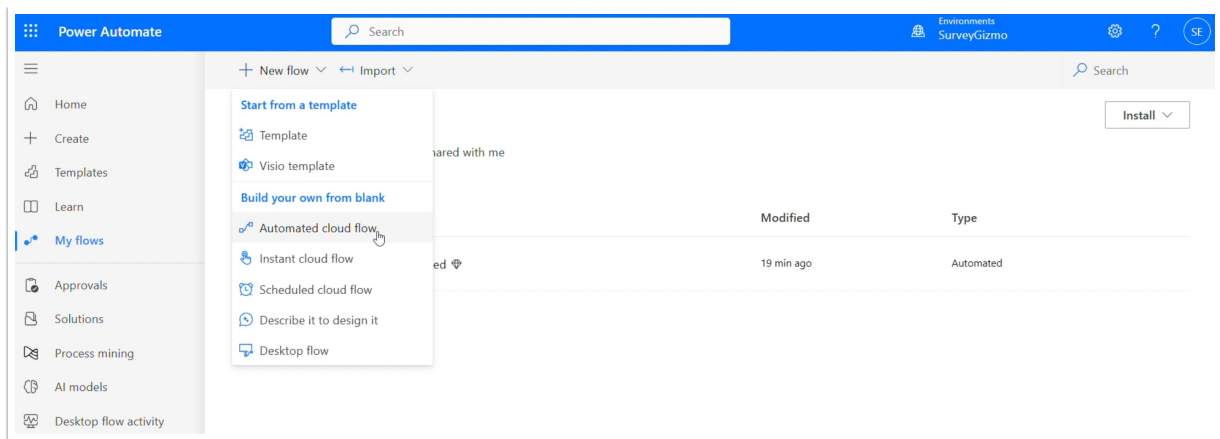
Save

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



The screenshot shows the Microsoft Dynamics 365 interface. The main area displays a workflow for 'Test opportunity 1-15' with steps: Qualify, Propose, and Close. A red box highlights the 'Propose' step, and a dropdown menu is open, showing options: Back, Manage, Create a flow, and See your flows. The left sidebar shows navigation options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Sales, Leads, Opportunities, Competitors, Collateral, and Sales. The right sidebar shows sections for Assistant, Notifications, People, and Stakeholders.

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](#).

Build an automated cloud flow

Free yourself from repetitive work just by connecting the apps you already use—automate alerts, reports, and other tasks.

Examples:

- Automatically collect and store data in business solutions
- Generate reports via custom queries on your SQL database

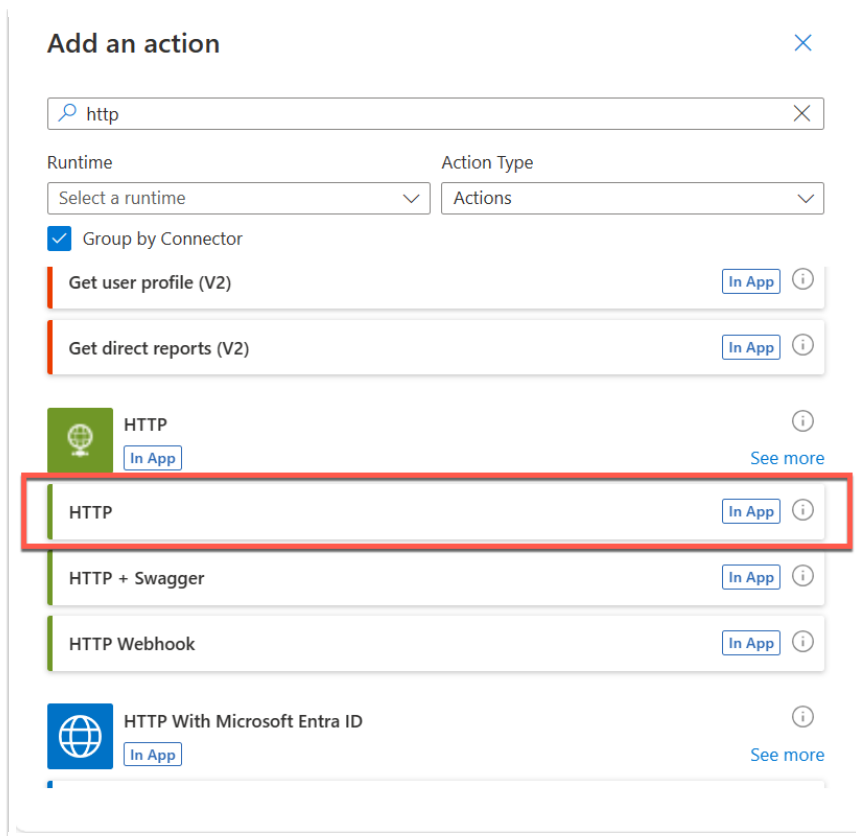
Flow name

Choose your flow's trigger * ⓘ

Search or select a trigger from the list below to create a flow. (Required)

- When a new response is submitted
Microsoft Forms ⓘ
- When an item is created
SharePoint ⓘ
- When an item is created or modified
SharePoint ⓘ
- When a file is created in a folder (de...
SharePoint ⓘ
- When a file is created
OneDrive for Business ⓘ

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
Showing 0 of 1 [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