

Microsoft Dynamics Integration for Alchemer Survey

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

If you have purchased the Dynamics Integration and are not seeing it in your account, [don't hesitate to reach out](#).

At a high-level, Alchemer's integration with Microsoft Dynamics 365 allows you to easily:

- Push survey data from Alchemer into Dynamics to update contacts.
- Pull data from Dynamics contact records into Alchemer, for use in surveys.

What are some examples of the Alchemer Dynamics Integration in practice:

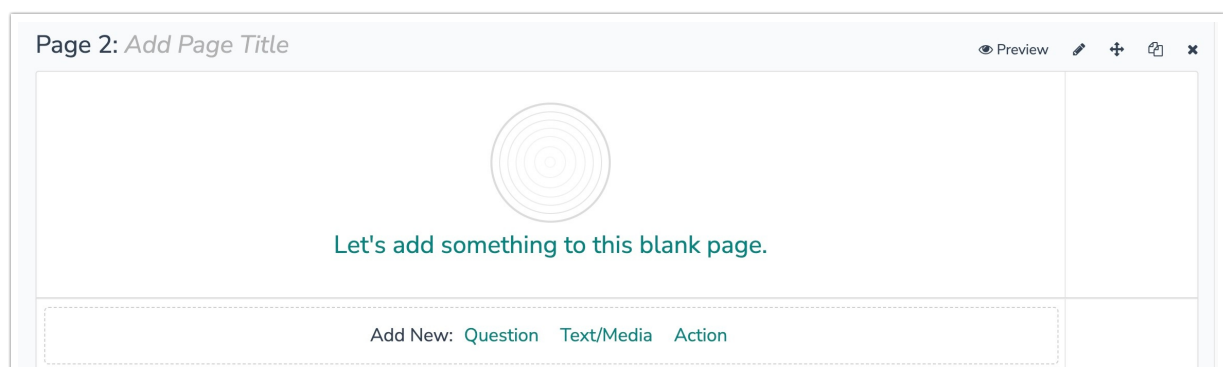
- Bring in data from Dynamics contact records or entities to personalize surveys sent through Alchemer.
- Pull demographic information from Dynamics contact records to use for reporting purposes.
- Use Alchemer survey data to update contact records in Microsoft Dynamics.

Integration Setup

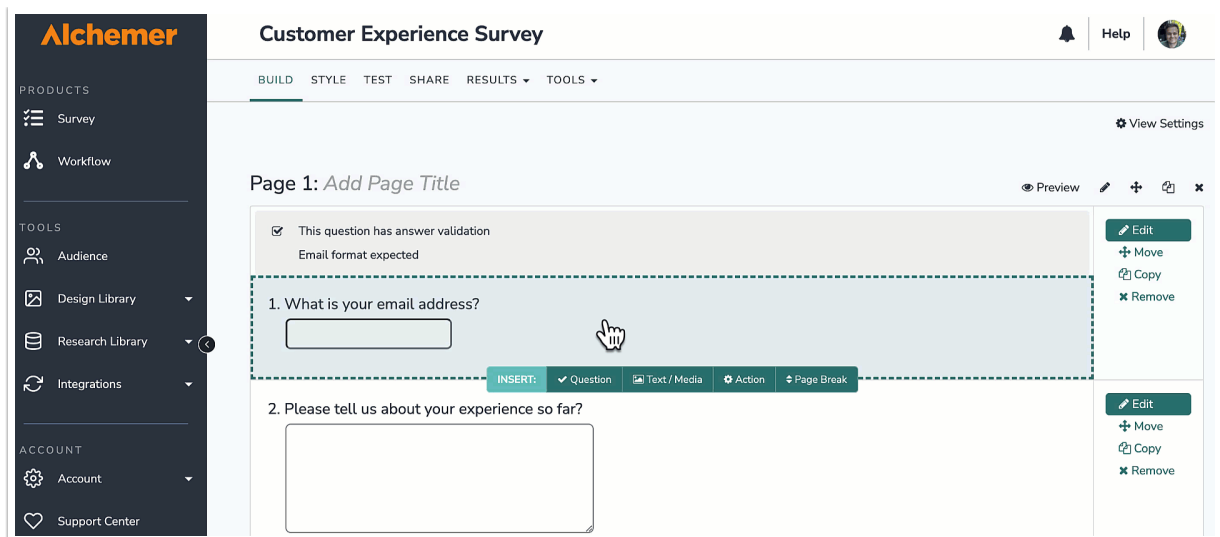
Adding an Integration Action

1. Select an existing survey or create a new survey. Then navigate to the Survey Builder.
2. Click "Add New: Action"

You cannot add this Integration Action to the first page of the survey.




3. In the Add Action modal, scroll down to Integrations. Then click "Add" for one of your purchased integrations.



If you haven't purchased any additional integrations, you will see the below screen:

Integrations

 Don't see what you're looking for? [Explore our integrations](#)

4. Select the action you would like to perform.

- **Get Contact:** Get a Microsoft Dynamics contact record. [Jump to section.](#)
- **Get Entity:** Get a record from Microsoft Dynamics 365 of any entity type. [Jump to section.](#)
- **Update Contact:** Update a Microsoft Dynamics 365 contact record. [Jump to section.](#)
- **Update Entity:** Update a record in Microsoft Dynamics 365 of any entity type. [Jump to section.](#)
- **Create Entity:** Create a record in Microsoft Dynamics 365 of any entity type. [Jump to section.](#)

Configure Action

PRIMARY SETUPLOGICADVANCED

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Select Action

Select the action you would like to perform.

Get Contact
Get a Microsoft Dynamics 365 contact record

Update Contact
Update a Microsoft Dynamics 365 contact record

Get entity
Get a record from Microsoft Dynamics 365 of any entity type

Update entity
Update a record in Microsoft Dynamics 365 of any entity type

Create entity
Create a record in Microsoft Dynamics 365 of any entity type

Cancel

Next

Dynamics | Get Contact

Before configuring the Dynamics Integration action you will need:

- Your Microsoft Dynamics 365 Login
- Fields in this survey that will contain the data used to lookup the Dynamics customer record

1. Select "Get Contact"

Configure Action

PRIMARY SETUPLOGICADVANCED

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Select Action

Select the action you would like to perform.

Get Contact

Get a Microsoft Dynamics 365 contact record

Update Contact

Update a Microsoft Dynamics 365 contact record

Get entity

Get a record from Microsoft Dynamics 365 of any entity type

Update entity

Update a record in Microsoft Dynamics 365 of any entity type

Create entity

Create a record in Microsoft Dynamics 365 of any entity type

Cancel

Next

2. Hit next on the integration overview screen.

Edit Action

PRIMARY SETUPLOGICADVANCED

Dynamics 365 | Get Contact

Get a Dynamics 365 contact record.

You will need:

Your Dynamics 365 login

Fields in this survey that will contain the data used to lookup the Dynamics 365 contact record

Need help? [Learn more](#)

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3. Connect your Dynamics account.

Edit Action

PRIMARY SETUPLOGICADVANCED

Dynamics 365 | Authentication

Connect to your Dynamics 365 account.

 New authentication

PreviousNext

4. Select the field in this survey you want to use to find the specific contact record in Dynamics. Contact Email will often make the most sense, but you can use any of the other fields listed in the drop-down list.

You are limited to one field to make the search.

Edit Action

PRIMARY SETUPLOGICADVANCED

Dynamics 365 | Find the Dynamics 365 Record

We need to find the contact record to pull when the survey runs.


Select the fields in this survey you want to use to find the specific contact record in Dynamics 365.

Click 'Add a new mapping' below to get started.

Match this Alchemer field value

to a value in this Dynamics 365 field

3. What is your customer email address? (id: 73) ▼

Dynamics | Contact | emailaddress1 ▼ 

Add a new mapping

*Only one field can be used to search.

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How to Create Fields in Alchemer

1. Add survey questions that when answered will provide the desired field. (Example: What is the customer email address?)
2. Create a container using a [Hidden Value](#). These Hidden Values can then be mapped to fields in Dynamics and used as [Merge Codes](#) in your survey.

5. Select the Dynamics contact fields you want to use in your survey.

Edit Action

PRIMARY SETUPLOGICADVANCED

Dynamics 365 | Get data back

Select the Dynamics 365 contact fields you want to use in your survey.

Get this field from Dynamics 365

To update this Alchemer survey field

Dynamics | Contact | firstname

4. First Name (id: 74)

Add a new mapping

PreviousNext

6. Click "Save".

Edit Action

PRIMARY SETUPLOGICADVANCED

Dynamics 365 | Setup complete

A log of each run result can be found in the Individual Responses > Action Log.

PreviousSave

Advanced Functionality (Optional)

After a Dynamics Get Contact action occurs, data about the action is available for use in your survey. You can map this data back to fields in Alchemer. These fields are intended to be used with custom scripts or to provide more details on what exactly the query returned.

Edit Action

PRIMARY SETUPLOGICADVANCED

Dynamics 365 | Get data back

Select the Dynamics 365 contact fields you want to use in your survey.

Get this field from Dynamics 365

To update this Alchemer survey field

Action Metadata message	Choose an option	
Action Metadata status_code	Choose an option	
Action Metadata execution_start_time	Choose an option	

Add a new mapping

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Dynamics | Get Entity

Before configuring the Dynamics Integration action you will need:

- To authenticate with Dynamics
- Fields in this survey that contain information to use to find the specific entity record to get (id, email, etc.)
- Fields in this survey where you can save the entity record information

1. Select "Get Entity"

Configure Action

PRIMARY SETUPLOGICADVANCED

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Select Action

Select the action you would like to perform.

Get Contact

Get a Microsoft Dynamics 365 contact record

Update Contact

Update a Microsoft Dynamics 365 contact record

Get entity

Get a record from Microsoft Dynamics 365 of any entity type

Update entity

Update a record in Microsoft Dynamics 365 of any entity type

Create entity

Create a record in Microsoft Dynamics 365 of any entity type

Cancel

Next

2. Hit next on the integration overview screen.

Configure Action

PRIMARY SETUPLOGICADVANCED

Dynamics | Get entity

Get a record from Microsoft Dynamics 365 of any entity type

You will need:

- To authenticate with Dynamics
- Fields in this survey that contain information to use to find the specific entity record to get (id, email, etc.)
- Fields in this survey where you can save the entity record information

Need help? [Learn more](#)

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3. Connect your Dynamics account.

Edit Action

PRIMARY SETUPLOGICADVANCED

Dynamics 365 | Authentication

Connect to your Dynamics 365 account.

 New authentication

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4. Select the entity type that you want to get.

Configure Action

PRIMARY SETUPLOGICADVANCED

Dynamics | Select entity type

Select the entity type you want to get.

Select entity type*

Choose an option

Select entity type is required

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5. Select the field in this survey you want to use to find the specific entity record in Dynamics.

Configure Action

PRIMARY SETUPLOGICADVANCED

Dynamics | Find entity record

Select the fields in this survey that contain the values you want to use to find the specific entity record in Dynamics.

At least one field is required. Multiple fields will be searched with AND logic.

Use this Alchemer field value

to match this Dynamics field

Question | 10. What is your email address? (id: 89)

Dynamics | Email (emailaddress1)

Add a new mapping

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How to Create Fields in Alchemer

1. Add survey questions that when answered will provide the desired field. (Example: What is the customer email address?)
2. Create a container using a [Hidden Value](#). These Hidden Values can then be mapped to fields in Dynamics and used as [Merge Codes](#) in your survey.

6. Select the Dynamics the entity fields you want to use in your survey.

Configure Action

PRIMARY SETUPLOGICADVANCED

Dynamics | Get data back

Select the fields you want to get back.

Use this Dynamics field

To update this Alchemer survey field

Dynamics | First Name (firstname)

Question | Person name (id: 99)

Add a new mapping

Note: The record ID is returned for fields of type 'Lookup' and 'Owner'. You can get details for these records by adding a second get entity action and using the record ID to find the specific record.

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7. Click "Save" to complete setup.

Configure Action

PRIMARY SETUPLOGICADVANCED

Dynamics | Setup complete

A log of each run result can be found in the Individual Responses > Action Log.

A status code is available in the action metadata:

- 200: A single record was successfully found.
- 201: More than one record was found. The first record is used for the values returned to Alchemer.
- 202: Query ran successfully, but no records were found
- 400: The external integration returned an error.

Dynamics | Update Contact

Before configuring the Dynamics Integration action you will need:

- Your Microsoft Dynamics 365 Login
- Fields in this survey that will contain the data used to lookup the Dynamics contact record
- Fields in this survey that contain the data you want to use to update the contact record in Dynamics.

1. Select "Update Contact"

Configure Action

PRIMARY SETUPLOGICADVANCED

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Select Action

Select the action you would like to perform.

Get Contact

Get a Microsoft Dynamics 365 contact record

Update Contact

Update a Microsoft Dynamics 365 contact record

Get entity

Get a record from Microsoft Dynamics 365 of any entity type

Update entity

Update a record in Microsoft Dynamics 365 of any entity type

Create entity

Create a record in Microsoft Dynamics 365 of any entity type

Cancel

Next

2. Hit next on the integration overview screen.

Edit Action

PRIMARY SETUPLOGICADVANCED

Dynamics 365 | Update Contact

Get a Dynamics 365 contact record.

You will need:

Your Dynamics 365 login

Fields in this survey that will contain the data used to lookup the Dynamics 365 contact record

Need help? [Learn more](#)

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3. Connect your Dynamics account.

Edit Action
PRIMARY SETUP
LOGIC
ADVANCED

Dynamics 365 | Authentication
Connect to your Dynamics 365 account.

New authentication

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4. Select the field in this survey you want to use to find the specific contact record in Dynamics. Contact Email will often make the most sense, but you can use any of the other fields listed in the drop-down list.

You are limited to one field to make the search.

Edit Action
PRIMARY SETUP
LOGIC
ADVANCED

Dynamics 365 | Find the Dynamics 365 Record
We need to find the contact record to pull when the survey runs.
Select the fields in this survey you want to use to find the specific contact record in Dynamics 365.
Click 'Add a new mapping' below to get started.

Match this Alchemer field value
to a value in this Dynamics 365 field

3. What is your customer email address? (id: 73)
Dynamics | Contact | emailaddress1

Add a new mapping

*Only one field can be used to search.

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How to Create Fields in Alchemer

1. Add survey questions that when answered will provide the desired field. (Example: What

is the customer email address?)

2. Create a container using a [Hidden Value](#). These Hidden Values can then be mapped to fields in Dynamics and used as [Merge Codes](#) in your survey.

5. Map a survey field in Alchemer to a corresponding field in Dynamics. This will push the data from that survey field into Dynamics and update the corresponding field for that contact record.

Edit Action

PRIMARY SETUPLOGICADVANCED


Dynamics 365 | Update contact with survey data

Add a description here

Use data from this Alchemer field

To update this Dynamics 365 field

12. What is your birthday? (id: 78) ▼

Dynamics | Contact | birthdate ▼ 

Add a new mapping

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Optional: Get Data Back About the Update Contact Action

After a Dynamics Update Contact action occurs, data about the action is available for use in your survey. You can map this data back to fields in Alchemer.

For example, if there is an error in the action you can skip the rest of the survey questions for that respondent.

6. Click Save.

Configure Action

PRIMARY SETUPLOGICADVANCED

Dynamics | Update entity

Update a record in Microsoft Dynamics 365 of any entity type

You will need:

- To authenticate with Dynamics
- Fields in this survey used to find the record to update
- Fields in this survey used to update the record

Need help? [Learn more](#)

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3. Connect your Dynamics account.

Edit Action

PRIMARY SETUPLOGICADVANCED

Dynamics 365 | Authentication

Connect to your Dynamics 365 account.

 New authentication

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4. Select the entity type you want to update from the dropdown.

Configure Action
PRIMARY SETUP
LOGIC
ADVANCED

Dynamics | Select entity type
Select the entity type.

Select entity type*

Choose an option

Select entity type is required

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5. Select the fields in this survey that contain the values you want to use to find the specific entity record to update.

Configure Action
PRIMARY SETUP
LOGIC
ADVANCED

Dynamics | Find entity record
Select the fields in this survey that contain the values you want to use to find the specific entity record to update.

Use this Alchemer field value
to match this Dynamics field

Question | 1. Input (id: 2)
Dynamics | First Name (firstname)

Add a new mapping

How to Create Fields in Alchemer

1. Add survey questions that when answered will provide the desired field. (Example: What is the customer email address?)
2. Create a container using a [Hidden Value](#). These Hidden Values can then be mapped to fields in Dynamics and used as [Merge Codes](#) in your survey.

6. Select the fields in this survey that contain the values you want to use to update the specific entity record.

Configure Action

PRIMARY SETUP
LOGIC
ADVANCED

Dynamics | Update entity record

Select the fields in this survey that contain the values you want to use to update the specific entity record.

Use this Alchemer field value

Question | 2. Update (id: 3)

to update this Dynamics field

Dynamics | Last Name (lastname)

Add a new mapping

Optional: Get Data Back About the Update Contact Action

After a Dynamics action occurs, data about the action is available for use in your survey. You can map this data back to fields in Alchemer.

For example, if there is an error in the action you can skip the rest of the survey questions for that respondent.

Configure Action

PRIMARY SETUP
LOGIC
ADVANCED

Dynamics | Get data back

Select the fields you want to get back.

Use this Dynamics field

Action | Metadata | message

To update this Alchemer survey field

Question | 3. Message (id: 4)

Choose an option

Question | 1. Input (id: 2)
Question | 2. Update (id: 3)
Question | 4. ID (id: 8)

Add a new mapping

7. Click "Save" to complete integration setup.

Configure Action

PRIMARY SETUP
LOGIC
ADVANCED

Dynamics | Setup complete

A log of each run result can be found in the Individual Responses > Action Log.

A status code is available in the action metadata:

200: Entity record was successfully updated.

202: Multiple entity records were found. Please update your query to select unique fields.

400: The external integration returned an error.

Dynamics | Create Entity

You will need:

- To authenticate with Dynamics
- Fields in this survey used to create the record for the selected entity

1. Select "Create Entity"

Configure Action

PRIMARY SETUPLOGICADVANCED

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Select Action

Select the action you would like to perform.

Get Contact

Get a Microsoft Dynamics 365 contact record

Update Contact

Update a Microsoft Dynamics 365 contact record

Get entity

Get a record from Microsoft Dynamics 365 of any entity type

Update entity

Update a record in Microsoft Dynamics 365 of any entity type

Create entity

Create a record in Microsoft Dynamics 365 of any entity type

Cancel

Next

2. Click "Next" on the integration overview screen.

Configure Action

PRIMARY SETUPLOGICADVANCED

Dynamics | Create entity

Create a record in Microsoft Dynamics 365 of any entity type

You will need:

- To authenticate with Dynamics
- Fields in this survey used to create the record for the selected entity

Need help? [Learn more](#)

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3. Connect your Dynamics account.

Edit Action

PRIMARY SETUPLOGICADVANCED

Dynamics 365 | Authentication

Connect to your Dynamics 365 account.

 New authentication

PreviousNext

4. Select the entity type you want to update from the dropdown.

Configure Action

PRIMARY SETUPLOGICADVANCED

Dynamics | Select entity type

Select the entity type.

Select entity type*

Choose an option

Select entity type is required

PreviousNext

5. Select the fields in this survey that contain the values you want to use to create the specific entity record in Dynamics.

Configure Action
PRIMARY SETUP
LOGIC
ADVANCED

Dynamics | Create entity record
Select the fields in this survey that contain the values you want to use to create the specific entity record in Dynamics.

Use this Alchemer field value

for this Dynamics field

Question | 1. First Name (id: 2)

Dynamics | First Name (firstname)

Add a new mapping

How to Create Fields in Alchemer

1. Add survey questions that when answered will provide the desired field. (Example: What is the customer email address?)
2. Create a container using a [Hidden Value](#). These Hidden Values can then be mapped to fields in Dynamics and used as [Merge Codes](#) in your survey.

6. Select the fields you want to get back.

Configure Action
PRIMARY SETUP
LOGIC
ADVANCED

Dynamics | Get data back
Select the fields you want to get back.

Use this Dynamics field

To update this Alchemer survey field

Action | Metadata | message

Question | 4. Message (id: 17)

Dynamics | Contact (contactid)

Question | 5. ID (id: 3)

Add a new mapping

Optional: Get Data Back About the Update Contact Action

After a Dynamics action occurs, data about the action is available for use in your survey. You can map this data back to fields in Alchemer.

For example, if there is an error in the action you can skip the rest of the survey questions for that respondent.

7. Click "Save" to complete integration setup.

Configure Action

PRIMARY SETUP

LOGIC

ADVANCED

Dynamics | Setup complete

A log of each run result can be found in the Individual Responses > Action Log.

A status code is available in the action metadata:

200: *Entity record was successfully created.*

400: *The external integration returned an error.*

Monitoring a Dynamics Integration Action

A log of each run result can be found in Results > Individual Responses > Action Log.

Select an individual response and then navigate to the Action Log. In the Action Log you can monitor if the action was successful or not.

FAQs

▸ What permissions do I need within Alchemer to set-up and use the Dynamics integration?

▸ This integration doesn't fit my use cases, or I want to provide feedback to Alchemer!

Related Articles