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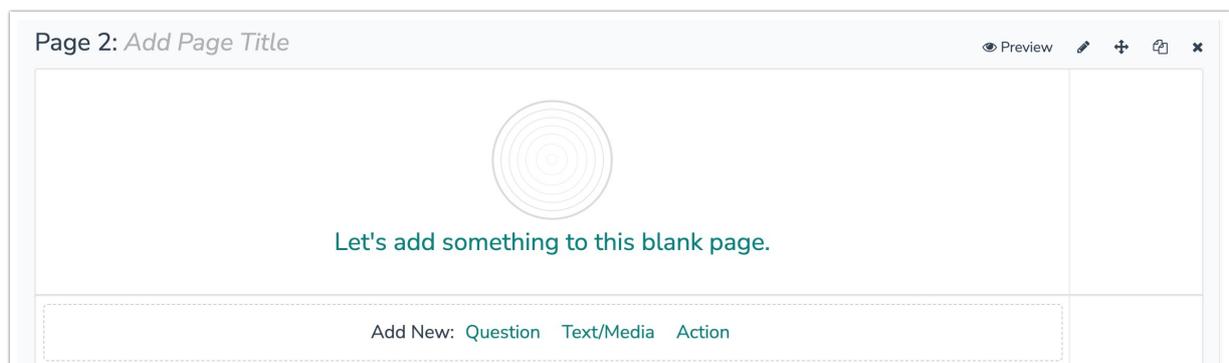
- Bring in data from Dynamics contact records or entities to personalize surveys sent through Alchemer.
- Pull demographic information from Dynamics contact records to use for reporting purposes.
- Use Alchemer survey data to update contact records in Microsoft Dynamics.
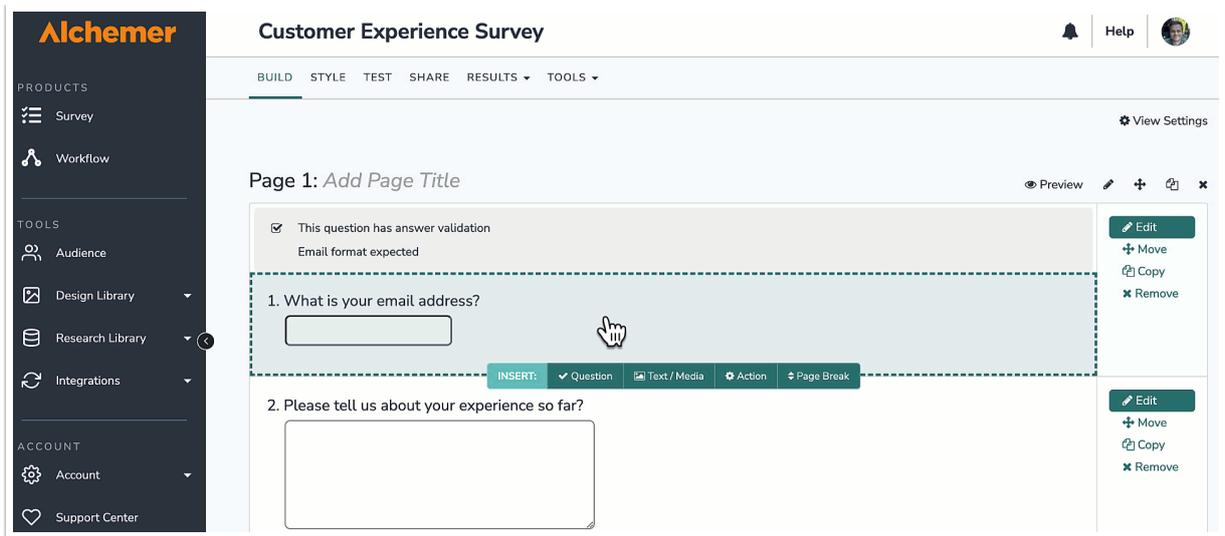
Integration Setup

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.

Page 2: *Add Page Title*   👁 Preview ✏ ✛ ▣ ✖

Let's add something to this blank page.

Add New: Question   Text/Media   Action

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 SETUP   LOGIC   ADVANCED

‹ Back

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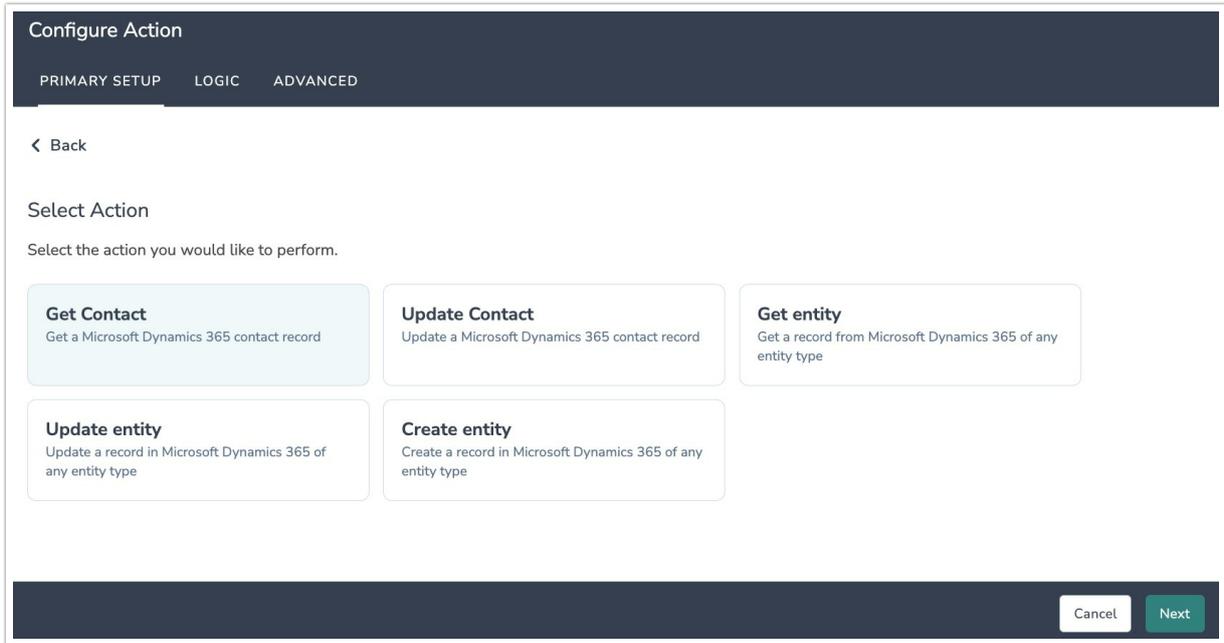Create a record in Microsoft Dynamics 365 of any entity type
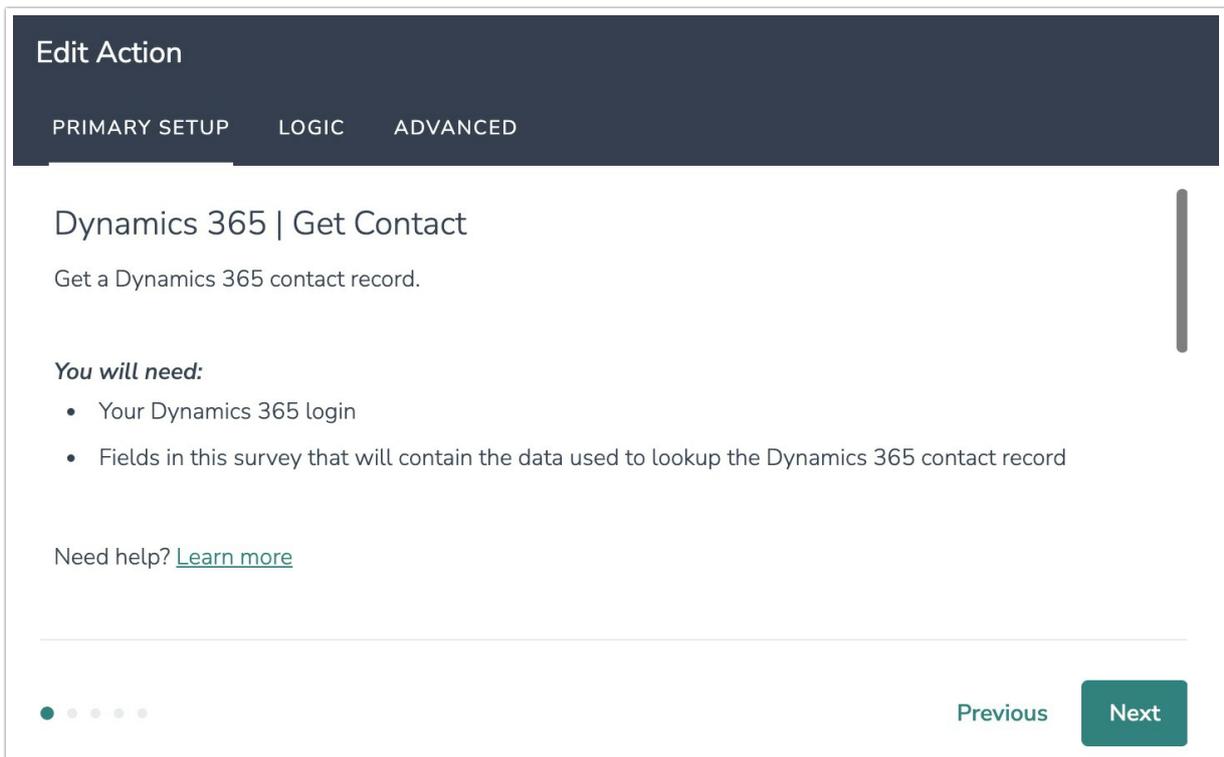
Cancel   Next

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 SETUP　　LOGIC　　ADVANCED

‹ Back

Select Action

Select the action you would like to perform.

Get Contact	Update Contact	Get entity
Get a Microsoft Dynamics 365 contact record	Update a Microsoft Dynamics 365 contact record	Get a record from Microsoft Dynamics 365 of any entity type

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

Cancel　　Next

2. Hit next on the integration overview screen.

Edit Action

PRIMARY SETUP　　LOGIC　　ADVANCED

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

Previous　　Next

3. Connect your Dynamics account.

Edit Action

PRIMARY SETUP   LOGIC   ADVANCED

Dynamics 365 | Authentication

Connect to your Dynamics 365 account.

> 💠   New authentication

○ ● ○ ○ ○ ○   Previous   **Next**

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.

○ ○ ● ○ ○   Previous   **Next**

> **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 SETUP   LOGIC   ADVANCED

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

Previous   Next

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6. Click "Save".

Edit Action

PRIMARY SETUP   LOGIC   ADVANCED

Dynamics 365 | Setup complete

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

Previous   Save

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.
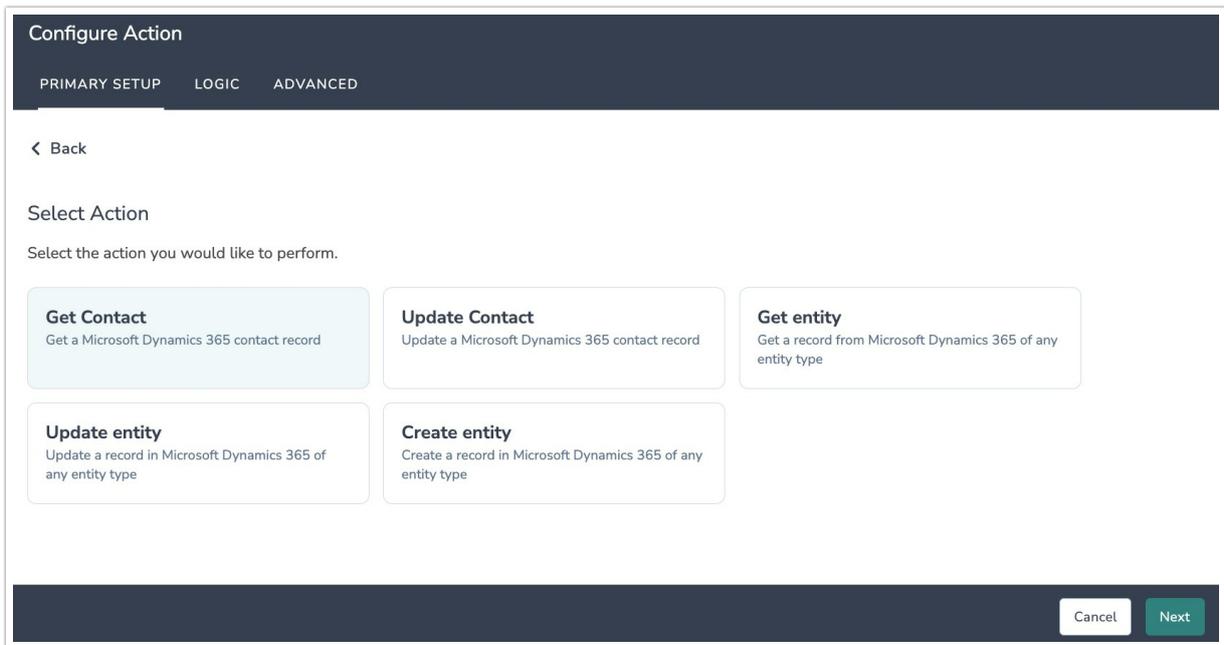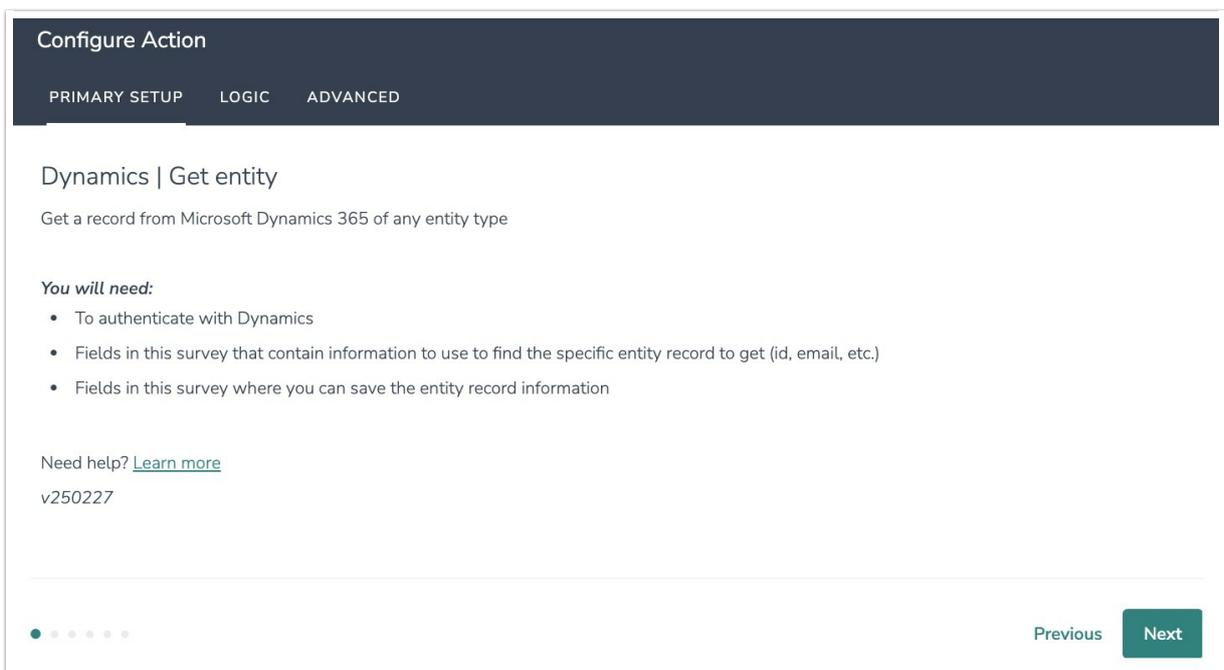

Dynamics | Get Entity

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 SETUP   LOGIC   ADVANCED

‹ Back

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 SETUP   LOGIC   ADVANCED

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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Previous   Next

3. Connect your Dynamics account.

Edit Action

PRIMARY SETUP   LOGIC   ADVANCED

Dynamics 365 | Authentication

Connect to your Dynamics 365 account.

> New authentication

Previous   **Next**

---

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

Configure Action

PRIMARY SETUP   LOGIC   ADVANCED

Dynamics | Select entity type

Select the entity type you want to get.

Select entity type*

Choose an option ⌄

Select entity type is required

Previous   **Next**

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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 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 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

● ● ● ● ● ●   Previous   **Next**

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 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

| 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.

● ● ● ● ● ●   Previous   **Next**

7. Click "Save" to complete setup.

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 SETUP   LOGIC   ADVANCED

‹ Back

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 SETUP   LOGIC   ADVANCED

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

● ○ ○ ○ ○ ○

Previous   Next

3. Connect your Dynamics account.

Edit Action

PRIMARY SETUP   LOGIC   ADVANCED

Dynamics 365 | Authentication

Connect to your Dynamics 365 account.

> New authentication

Previous   **Next**

---

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.

Previous   **Next**

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 SETUP   LOGIC   ADVANCED

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

• • • • • •   Previous   Next

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.

Edit Action

PRIMARY SETUP   LOGIC   ADVANCED

Dynamics 365 | Setup complete

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

● ● ● ● ● ●   Previous   **Save**

Dynamics | Update Entity

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

1. Select "Update Entity"

Configure Action

PRIMARY SETUP   LOGIC   ADVANCED

‹ Back

Select Action

Select the action you would like to perform.

Get Contact	**Update Contact**	**Get entity**
Get a Microsoft Dynamics 365 contact record	Update a Microsoft Dynamics 365 contact record	Get a record from Microsoft Dynamics 365 of any entity type

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

Cancel   **Next**

2. Click "Next" on the overview screen.

Configure Action

PRIMARY SETUP   LOGIC   ADVANCED

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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Previous   Next

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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

Previous   Next

---

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

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

> **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   **to update this Dynamics field**

| Question | 2. Update (id: 3) | ⌄ | | 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   **To update this Alchemer survey field**

| Action | Metadata | message | ⌄ | | Question | 3. Message (id: 4) | ⌄ | 🗑 |
| Dynamics | Contact (contactid) | ⌄ | | Choose an option | ⌃ | 🗑 |

Add a new mapping

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

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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

1. Select "Create Entity"

Configure Action

PRIMARY SETUP   LOGIC   ADVANCED

‹ Back

Select Action

Select the action you would like to perform.

| **Get Contact** | **Update Contact** | **Get entity** |
| Get a Microsoft Dynamics 365 contact record | Update a Microsoft Dynamics 365 contact record | Get a record from Microsoft Dynamics 365 of any entity type |

| **Update entity** | **Create entity** | |
| Update a record in Microsoft Dynamics 365 of any entity type | Create a record in Microsoft Dynamics 365 of any entity type | |

Cancel   Next

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

Configure Action

PRIMARY SETUP   LOGIC   ADVANCED

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.

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

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.

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