

Use Custom Queries to Pull Records from Microsoft Dynamics

The MS Dynamics – Custom Query integration empowers you to pull exactly the data you need from Microsoft Dynamics by writing your own FetchXML queries. Whether you're targeting specific entities or filtering by custom fields, this advanced integration gives you precise control over what data flows into your Alchemer workflows.

⚙️ **Note:** This integration is available as part of Alchemer's enterprise offerings. If you're interested in adding it to your account, please [contact an Alchemer representative](#) [↗] to learn more.

What is a custom query?

Custom queries let you go beyond standard record pulls. Instead of relying on default fields or pre-built filters, you can define your own FetchXML to:

- Target specific records
- Include complex filter conditions
- Access custom entities in your Dynamics 365 environment

Key benefits

- **Precision** – Retrieve only the data you need
- **Flexibility** – Build dynamic queries based on business logic
- **Integration depth** – Connect with any Dynamics entity, standard or custom

Set Up a Custom Query In Alchemer

If your account includes this integration, follow these steps:

What you'll 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

Configure Action

PRIMARY SETUP LOGIC ADVANCED

Dynamics | Custom query

Get a record from Microsoft Dynamics 365 of any entity type using custom queries

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](#)

v250806

Previous **Next**

1. Go to your Microsoft Dynamics 365 integration

Navigate to Your Integrations > Microsoft Dynamics 365 within your Alchemer account.

Actions

ADD ACTION [Need Help?](#)

Gladly	Start an Alchemer Workflow from an event in Gladly	+ Add
Google Sheets	Google Sheets integration with Alchemer	+ Add
HubSpot	Receive, update, or add records in HubSpot	+ Add
Klaviyo	Receive, update, or add records in Klaviyo	+ Add
Microsoft Dynamics 365	Get data from Microsoft Dynamics 365 or send data to Microsoft Dynamics 365	+ Add
Microsoft Office 365	Microsoft Office 365 integration with Alchemer	+ Add
Microsoft Power BI	Microsoft Power BI integration with Alchemer	+ Add
Salesforce	Start an Alchemer Workflow from an event in Salesforce	+ Add

Cancel

2. Choose the 'Custom Query' option

When setting up your record pull, select **Custom Query** as the method.

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

Custom query
Get a record from Microsoft Dynamics 365 of any entity type using a custom query

Cancel
Next

3. Dynamics | Authentication Authenticate with Dynamics.

Edit Action

PRIMARY SETUP
LOGIC
ADVANCED

Dynamics | Authentication

Authenticate with Dynamics

Microsoft Dynamics 365 connected

PRODUCTIONUS:C719797:T1036009's Microsoft Dynamics 365 account

v
...

•
•
•
•
•

Previous
Next

4. Dynamics | Select entity type Select the entity type you want to get.

Edit Action

PRIMARY SETUP LOGIC ADVANCED

Dynamics | Select entity type

Select the entity type you want to get.

Select entity type*

Contact (contacts) ▼

Previous **Next**

5. 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

Edit 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 | 1. Input (id: 3)

Dynamics | First Name (firstname)

Add a new mapping

Dynamics custom queries (optional)

0

(emailaddress1 eq 'test2@example.com')

Add to Value

If you would like to add special parameters to your search you can add them here. These will be concatenated to the selected fields above. Please use the following format:

(firstname eq 'John')

(lastname ne 'Smith')

Record count to return*

10

Please enter the amount of records that you would like to return from your query in the raw response. The first record returned will be used for the field mapping. Default is set to 10.



Previous

Next

6. Dynamics | Get data back

Select the fields you want to get back.

Edit 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 | 2. Output (id: 4) 🗑️

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. Dynamics | Setup complete

Test and save.

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

Edit 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: 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.

Previous Save

Common use cases

- Load contact records updated within a specific timeframe
 - Pull leads by region or owner
 - Target accounts with custom attributes or statuses
-

Ready to get started?

To enable this feature or learn more about enterprise integrations, please [get in touch with our team](#)[↗]. We're happy to help you unlock deeper data connections with Microsoft Dynamics.

Related Articles