# 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 <sup>↗</sup> 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

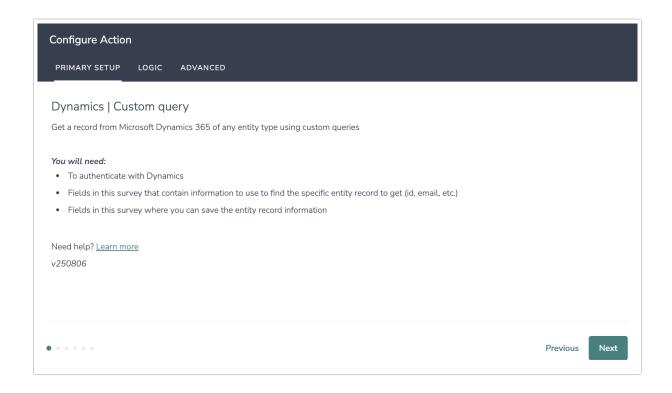
- Precision Retrieve only the data you need
- Flexibility Build dynamic queries based on business logic
- Integration depth Connect with any Dynamics entity, standard or custom

# Set Up a Custom Query In Alchemer

If your account includes this integration, follow these steps:

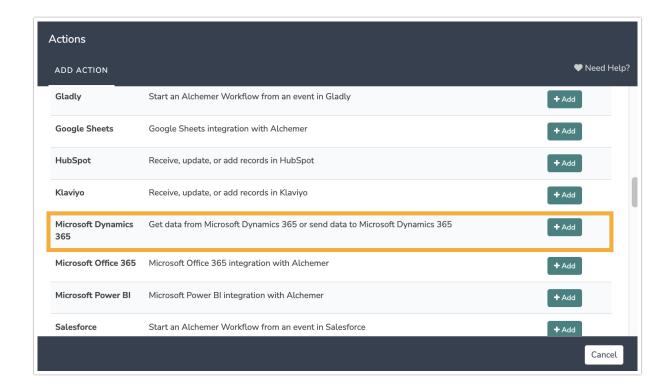
#### What you'll need:

- 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



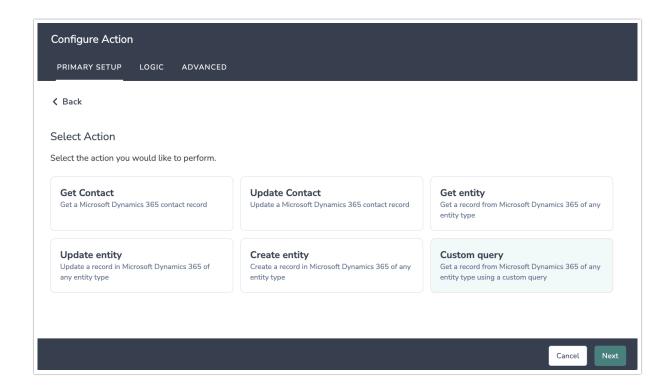
#### 1. Go to your Microsoft Dynamics 365 integration

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

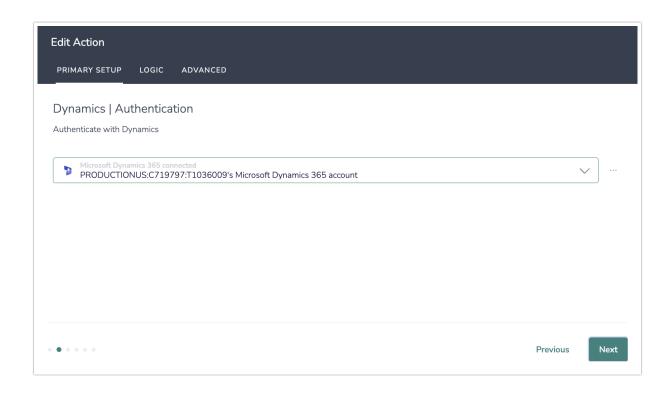


#### 2. Choose the 'Custom Query' option

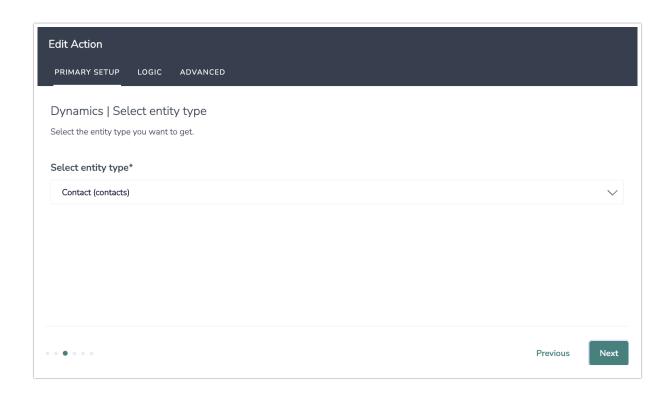
When setting up your record pull, select **Custom Query** as the method.



3. Dynamics | Authentication Authenticate with Dynamics.

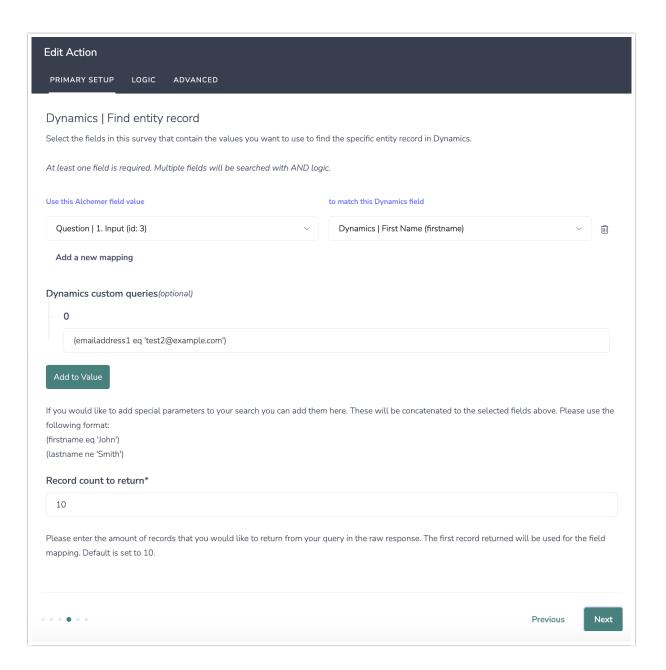


4. Dynamics | Select entity type Select the entity type you want to get.

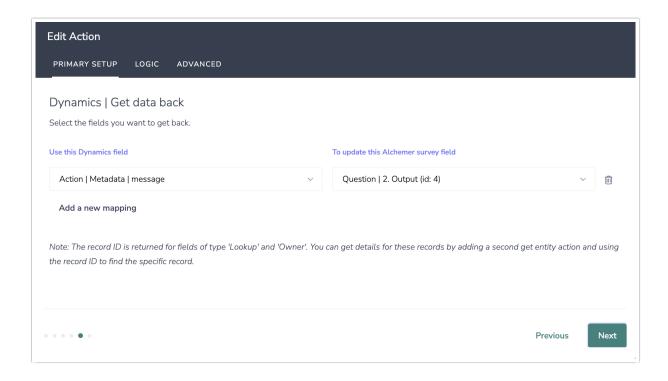


### 5. Dynamics | Find entity record

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



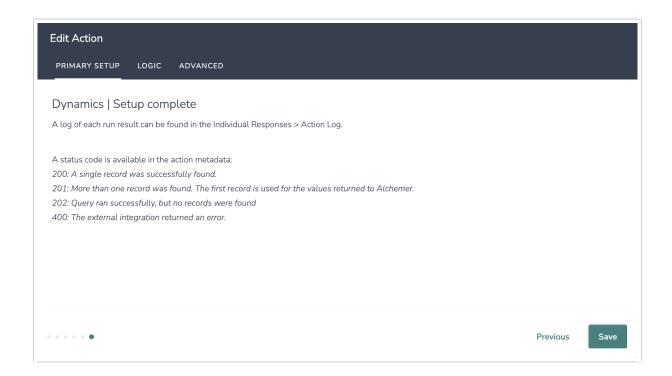
6. Dynamics | Get data back Select the fields you want to get back.



#### 7. Dynamics | Setup complete

Test and save.

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



- 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  $^{\nearrow}$ . We're happy to help you unlock deeper data connections with Microsoft Dynamics.

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