

Dynamics 365

Overview

The Dynamics 365 integration lets your team review customer feedback, sales opportunities, and accounts alongside live CRM records, so decisions are backed by both commercial and product context.

Alchemer Voice connects directly to Microsoft Dynamics 365, covering the Sales and Customer Service modules. All syncing is read-only, so your CRM data is never changed.

Who this is for

This integration is built for account managers, product managers, customer success teams, user researchers, and anyone who wants to tie customer conversations to real CRM data.

What you can do with the Dynamics 365 integration

- Link every conversation, call, and insight to the matching account, contact, opportunity, and customer service ticket in Dynamics 365.
- Filter and segment your insight data using live CRM fields such as account name, segment, size, status, and product.
- See the current state of any deal, relationship, or issue inside Alchemer Voice, with details synced from Dynamics.
- Group, analyze, and track topics by any CRM field, for example reviewing feedback by opportunity stage.
- Use a single view in Alchemer Voice to see every conversation, ticket, and participant connected to a specific account.
- Analyze accounts and their related feedback with richer context and trends, for example to validate sales objections or feature requests on key deals.

How it works

- A Dynamics 365 administrator connects Dynamics to Alchemer Voice from the Connections page.
- Alchemer Voice imports data from your CRM, including contacts, accounts, opportunities, and customer service tickets.
- Alchemer Voice matches each relevant insight, conversation, or ticket to the correct CRM record in your workspace.
- Matching happens automatically, and you can filter or analyze the links using any synced CRM field.
- When you open an account in Alchemer Voice, you see all of its conversations, tickets,

insights, and relevant commercial data together.

Set up the Dynamics 365 integration

A Dynamics admin completes the initial connection. To connect your Dynamics 365 instance:

1. Open the Connections page under Admin in Alchemer Voice.
2. Scroll to Customer Relationship Management and locate Dynamics 365.
3. Select **Connect** and complete authentication as a Dynamics admin user.
4. Once connected, Alchemer Voice begins syncing automatically. There is no field mapping to configure; the standard Sales and Customer Service objects are imported by default.

Common use cases

Use case	How
Filter feedback by deal stage	Use CRM filters to view all insights linked to opportunities in a given stage, such as qualifying or closing.
Validate requests by segment or industry	Filter conversations or requests to see what your largest accounts or contacts in specific industries are discussing.
View all conversations for an account	Open any synced CRM account in Alchemer Voice for a single view of all interactions, tickets, and topics.
Connect support tickets to product themes	Identify which accounts have the most support issues and how their top problems tie back to feature gaps or bugs.

FAQs

Does Alchemer Voice change or edit anything in Dynamics?

No. Alchemer Voice reads CRM data for matching and analysis only and never changes your data in Dynamics.

What CRM objects are synced?

Contacts, accounts, opportunities, and customer service tickets from Dynamics 365 Sales and Customer Service.

Can I filter insights by CRM fields that are not shown in the interface?

Yes. You can configure Alchemer Voice to import any field as a custom filter.

Who needs to connect Dynamics to Alchemer Voice?

A Dynamics 365 admin is required for the initial connection. After it is connected, your Alchemer Voice users have access to the synced data.

How often is the data refreshed?

Data syncs every few minutes.

If you need deeper setup guidance or help with custom mappings, contact Alchemer support.

Key terms

Term	Definition
Account	A company or organization tracked in your Dynamics CRM.
Contact	An individual associated with an account.
Opportunity	A sales deal or lead in Dynamics 365.
Customer service ticket	A support issue in your CRM.
Insight	Customer feedback or a snippet of conversation analyzed in Alchemer Voice.
Conversation	A logged call or meeting recorded in Alchemer Voice.

With Dynamics 365 connected, Alchemer Voice gives you the full picture, automatically linked across your CRM and your customer insights for more strategic, data-driven decisions.

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