Microsoft Dynamics 365

Integration Overview

The Webcast Dynamics 365 Integration offers the capability to pass webcast data into Microsoft Dynamics. The Webcast Activity Feed is an integration managed by the webcast team that allows you to create / update contacts, create / update leads, update campaigns, and capture interaction data in custom objects.

Webcast Activity Feed

Activity Feed Overview

The Webcasts Activity Feed sends webcast registration, attendance and interaction data into Microsoft Dynamics. This document outlines the specific data that passes with the integration, as well as setup steps required to complete the integration. The Microsoft Dynamics activity feed is facilitated by Workato.

> The webcast activity feed is setup and managed by the webcast team, please use the form to request the required support.

Included Data and Endpoints

Clients are able to customize which data and endpoints listed below are included with their implementation. This will be confirmed during the meeting with a webcast integration specialist.

- Create new Dynamics Contacts
  - Standard Webcast Registration Details

  - Custom Webcast Registration Details

- Update Existing Contacts
  - Standard Webcast Registration Details

  - Custom Webcast Registration Details

- Create new Dynamics Leads
  - Standard Webcast Registration Details

  - Custom Webcast Registration Details

- Update Existing Leads

  - Standard Webcast Registration Details

  - Custom Webcast Registration Details

- Webcast Interaction Data (Dynamics Custom Entities)

  - Standard Webcast Registration Details

  - Custom Webcast Registration Details

  - Webcast Viewing Session Times and Durations

  - Webcast Polling / Survey Responses

  - Webcast Q&A Data

  - Webcast CE Details

Requirements

- API enabled Dynamics Account

- Custom Entities to store webcast interaction data

Custom Entities

Entity Name: Webcast Registration Viewer Data

Field Name	Required	Description	Field Type
External ID	Yes	Stores unique values which connect the data between the webcast and Dynamics	text, 255 characters (External ID)
Address1	No	Street Address 1	text, 255 characters
Address2	No	Street Address 2	text, 255 characters
Attended	No	Did the webcast registrant view, at least a portion, the webcast	checkbox (default value: unchecked)
Campaign Source	No	Track the marketing channel that drove webcast registration	text, 255 characters
Certificate Link	No	Link to download the user's certificate, if applicable	text, 255 characters
Certification Results	No	Did the user pass the requirements to receive CE credit	text, 255 characters
City	No	City	text, 255 characters
Company	No	Company	text, 255 characters

Contact	No	Connects the custom object record to the corresponding contact, if contact exists	Contact ID
Cost Center	No	Text field in the webcast setup, generally utilized to capture sponsor or billing code information	text, 255 characters
Country	No	Country	text, 255 characters
Custom Registration	No	Non-default webcast registration field. The actual field name implemented should not be "Custom Registration" but reflect the information captured	text, 255 characters
Email	No	Email	email
Fax Number	No	Fax Number	text, 255 characters
First Name	No	First Name	text, 255 characters

Hidden Field	No	A registration field that is hidden on the webcast registration form. Similar to the "Custom Registration" field a different field name can be chosen for this field.	text, 255 characters
IP Address	No	IP Address	text, 255 characters
Last Name	No	Last Name	text, 255 characters
Lead	No	Connects the custom object record to the corresponding lead, if lead exists	Lead ID
Live Session Duration	No	The amount of time the user viewed the webcast live	int (length: 18, decimal: 0)
Mobile Number	No	Mobile number	text, 255 characters
OD Session Duration	No	The amount of time the user viewed the webcast in their most recent on-demand session	int (length: 18, decimal: 0)
Phone Number	No	Phone Number	text, 255 characters

Postal Code	No	Postal or ZIP Code	text, 255 characters
Referrer	No	The address of the website the user accessed the webcast URL from, if included in the browser header.	text, 255 characters
Registration Date	No	Date of user registration for the webcast	date/time
Sim Live Duration	No	The amount of time the user viewed the webcast in their most recent simulated-live session	int (length: 18, decimal: 0)
State	No	State or Province	text, 255 characters
Title	No	Job Title	text, 255 characters

Unsubscribed	No	Unsubscribe to email communications for this specific webcast event ID. checked(unsubscribed from communications), unchecked(did not unsubscribe from communications)	checkbox (default value: unchecked)
User Agent	No	A characteristic string that lets servers and network peers identify the application, operating system, vendor, and/or version of the requesting user agent.	text, 255 characters
Webcast Event ID	No	Unique id of the corresponding webcast event	text, 255 characters
Webcast Event Title	No	Title of the corresponding webcast event	text, 255 characters

Entity Name: Webcast Survey QA Data

Field Name	Required	Description	Field Type

External ID	Yes	Stores unique values which connect the data between the webcast and Dynamics	text, 255 characters (External ID)
Answer	No	Depending on "Record Type" it is either a viewer's response to a poll/survey or an admin's response to a viewer question	text area, 3000 characters
Campaign Source	No	Track the marketing channel that drove webcast registration	text, 255 characters
Contact	No	Connects the custom object record to the corresponding contact, if contact exists	Contact ID
Email	No	Email	email
Lead	No	Connects the custom object record to the corresponding lead, if lead exists	Lead ID

Question	No	Depending on "Record Type" it is either a viewer question or the question for a poll/survey	text area, 3000 characters
Record Type	No	QA: Is a viewer question In-Event: Is a survey/poll sent during the webcast Post-Event: Is a survey responded to after the conclusion of the webcast	text, 255 characters
Webcast Event ID	No	Unique id of the corresponding webcast event	text, 255 characters
Webcast Event Title	No	Title of the corresponding webcast event	text, 255 characters

> If you need additional information on creating Custom Entities in Microsoft Dynamics, please contact Dynamics Support.

Implementation Process

To facilitate the integration implementation you will need to schedule a meeting with an integration specialist to review the specific requirements for your integration, which were outlined in the completed form. The integration process is handled almost entirely by the

webcast team, there are a couple steps you will need to complete:

1. Create the two custom entities in Dynamics to store webcast activity data.

2. Connect Workato to Dynamics. It is recommended that the initial integration setup be completed using a sandbox environment, if available. The connection to Workato will be completed during your implementation call, but you can review the process by watching the Workato Connection Setup Tutorial.