Integrating with MS Dynamics 365 CRM

Please remember, the Align-Zapier integration will push a number that is exposed to the Zapier app into the critical number in Align. Align does not do additional calculations or transformation of data and can only use what MS Dynamics exposes to Zapier.

Note: MS Dynamics 365 CRM requires a Premium Zapier account

Before you connect apps for your company, you should connect Align and Zapier: https://aligntoday.com/zapier-integration-faq/

Check the Data Options

1. Make sure the data point you want is exposed in a usable format - Before creating a Zap, check the updated Zapier data integration options for MS Dynamics 365 CRM through the following link: https://zapier.com/apps/microsoft-dynamics-crm/integrations (Scroll all the way down!)
2. If you don't see the desired data, you can use MS Dynamics to Zapier's Email Parser to Align. This allows you to take a data point from an email sent from MS Dynamics and use that to populate the critical number.

Direct Integration

If your desired data point is available directly through the MS Dynamics 365 CRM to Zapier integration, follow the directions below.

Connect your app:

Connect to Microsoft - Once logged in to your Zapier account, go to the "My Apps" tab on the left navigation toolbar and use the search bar to connect to your Microsoft account. Once signed in to your MS account in Zapier, confirm this connection by clicking "Test"

Note:

When creating a zap, it is possible to select Align as the "trigger event" in the first step and not the "action event" which corresponds to the second step. This allows you to export critical numbers out of Align but is NOT a recommended process because this is not how the API is set up. We have not properly tested this functionality and, again, do not recommend setting up a zap this way.

Create your Zap:

Part 1 – MS Dynamics

1. Creating a Zap - From the Zaps tab, click "Create Zap" and select MS Dynamics 365 CRM as the app in the first step of your zap called "When this happens"
2. Selecting Trigger Event - Next, you will need to select what your desired trigger event is to enact the data transfer from MS Dynamics into Align via Zapier.
3. MS Sign-In - After selecting your trigger event, you will then be prompted to connect your Microsoft account with Zapier. Signing-in confirms the connection between the two apps.
4. Select Data and Test - After signing in, you will be brought to the next step where you will select the desired data that you want to be pulled into your critical number. After doing so, you will be forced to test this trigger to make sure that the data is being exposed and pulled through correctly. If successful, you will be shown a template of what data is being captured and sent through to Align.

Part 2 – Align

1. "Do this" - In part 2, under "Do this...", choose the Align app and Update CN value as the action event.
2. Align Account - The next step of this process is to select/sign-in to your Align account
3. Customize CN Value - After signing-in, select/create your desired external ID that correlates to your critical number in Align, type in update "today", and select the correct value from your MS Dynamics 365 form that you set up in step 4, part 1.
4. Test and Turn-On Zap - Now, your zap is ready to be tested. After successfully testing your Zap, you can turn it on to automatically update your critical number in Align.

Note:

There may be a slight delay for your critical number value to update in Align. This could be a result of the settings for the app you're directly integrating with or a byproduct of the Zapier plan you are on. To check what the update time is for you Zapier plan, check the following link: https://zapier.com/app/billing/plans