

Microsoft Dynamics 365 Integration

You can quickly resolve customer issues and pass qualified leads to your sales team using Sprout Social's integration with Microsoft Dynamics 365. By pushing messages and contact information you receive from Facebook, Instagram, Twitter and LinkedIn your customers and prospects get in touch with the right teams quickly.

Easily track customer issues, record customer interactions, route cases and create leads by pushing social messages directly from Sprout into Dynamics 365.

Note: You must be an Account Owner or have the Manage Profiles & Permissions permission to set up this integration.

Connecting to Microsoft Dynamics 365

In order to push information from your Sprout account to Microsoft Dynamics 365, you must complete the following phases:

1. Request a connection.
2. Connect your Sprout account to your preferred Dynamics 365 environment.
3. Download and install the Sprout Social app from the Microsoft AppSource Store.

It's imperative that each step of this process is completed, so the connection between the two systems works properly.

Note: Currently, there is no two-way communication between Dynamics 365 and Sprout. Sprout pushes information from social media messages to your specified Dynamics environment. You can't edit, delete or show any of the Dynamics 365 information in Sprout.

Requesting a connection

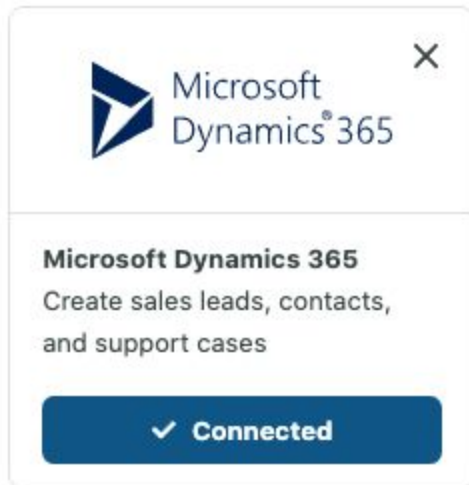
To get started with Sprout's Dynamics 365 integration, navigate to **Account and settings > Settings > Integrations**, and then click **Request Connection** for Microsoft Dynamics 365. This kicks off a process for you to complete an end-user license agreement with Twitter.

Sprout teams handle this process with you, supporting you along the way. You should hear from an account representative within 24 hours of clicking Request Connection. Once this process is complete, you can move onto the next phase.

Connecting Sprout to your preferred Dynamics 365 environment

After you receive confirmation that your end-user license agreement is complete, you can connect Sprout to your preferred Dynamics 365 environment. To do this:

1. Navigate to **Account and settings > Settings > Integrations**, and then click **Connect** for Microsoft Dynamics 365.
2. Complete the OAuth process to securely log in to your Dynamics 365 account.
3. Select the environment you want to add from the dropdown. You might start by connecting a staging environment, try out the integration, and then disconnect that environment and reconnect to your production environment.
4. Click **Complete**. You now see Connected on the Integrations screen for Dynamics 365.



Now, you can move on in importing the Sprout solution to your Dynamics 365 environment. You **MUST** complete the next phase of the connection process in order for the integration to work properly.

Getting the Sprout Social App

After you connect to your preferred environment, you can install the Sprout Social App from the Microsoft AppSource Store.

After the install is complete, the following fields get attached to your Contact and Lead entities:

- Twitter Username
- Facebook Profile
- Instagram Username
- LinkedIn Profile
- Other Social Profile

Now, you can start creating new entities in Sprout to push to Dynamics 365.

Creating an entity

You can create Contacts, Leads and Cases from Sprout and push social message details to your Dynamics 365 environment. This push creates a new row on the entity type you specify with the appropriate social information tied to it.

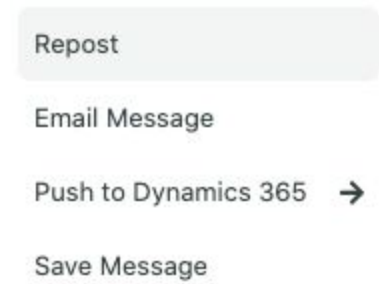
Create a Lead if you notice someone on Twitter is engaging with your brand and wants to learn more about your products. By creating a Lead, your sales team can see it in Dynamics 365, claim it and then follow up to begin the sales process.

Create a Case if a customer reached out to you via Facebook about an issue or problem with your product and they require a little more support. Creating a Case ensures your support team can see the request, claim the case and assist your customer.

Create a Contact for someone who works at a company that you already do business with. For example, if a CEO from one of your partners starts interacting with you on Instagram, you can create a new Contact in Dynamics 365 to keep their Instagram handle along with their contact information.

To create an entity from Sprout:

1. Navigate to the **Messages** tab.
2. Click **...** for the message you want to create an entity from. You can create entities from public and private messages.
3. Click **Push to Dynamics 365**.



4. Click **Create Case**, **Create Contact** or **Create Lead**, depending on the type of entity that translates to the message. A popup appears.



5. Enter the appropriate fields based on the entity type:
 - For a Case, the contents of the message, along with the social profile are automatically populated in the Description field. Add more information if necessary, and then click **Create Case**.

- For a Contact, the first name, last name and social profile are automatically populated. Additionally, the description auto populates with the contents of the message. Add more information if necessary, and then click **Create Contact**.
- For a Lead, the first name, last name, social profile and source fields are automatically populated. Additionally, the description auto populates with the contents of the message. Add more information if necessary, and then click **Create Lead**.

Create Lead in Dynamics 365

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First Name (Optional)

Benjamin

Last Name

Smith

Social Profile

Benjamin Smith

Source

Sprout Social

Email (Optional)

Enter email address

Mobile Phone (Optional)

Enter mobile phone number

Company Name (Optional)

Enter company name

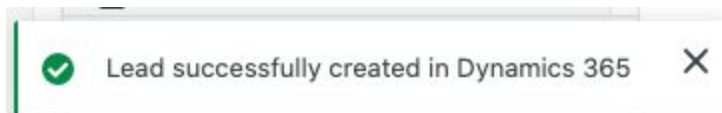
Description (Optional)

Interested in purchasing our coffee beans via wholesale.

Cancel

Create Lead

When the entity is successfully created, a message appears in the lower-right corner of your screen.



You can double-verify that the entity appears in your Dynamics 365 environment by logging in and checking the rows for the particular entity you created.