How to connect Microsoft Dynamics 365 with ActiveCampaign

This integration is currently in a closed beta for customers with the following plans:

- Professional
- Enterprise

The ActiveCampaign Microsoft Dynamics 365 integration provides a two-way sync between your ActiveCampaign account and your Microsoft Dynamics account. This integration will let you:

- Sync leads and contacts between both platforms
- View marketing activities in Microsoft Dynamics for each synced lead and contact
- Add leads and contacts to automations right from the lead or contact record in Microsoft Dynamics
- Send email campaigns to leads and contacts right from the lead or contact profile record in Microsoft Dynamics
- Trigger automations in ActiveCampaign based on updates
- Map and sync custom fields on lead and contact records in both platforms

In this article, you'll learn how to set up the ActiveCampaign Microsoft Dynamics integration:

- [Setup Step 1: Install the ActiveCampaign app](#)
- [Setup Step 2: Connect ActiveCampaign to Microsoft Dynamics](#)
- [Setup Step 3: User management](#)
- [Setup Step 4: Data configuration](#)
- [Setup Step 5: Sync Settings](#)
- [Integration next steps](#)

Take note

- This integration is configured in your Microsoft Dynamics account
- You will need your [ActiveCampaign API URL and Key](#) to set up the integration
- Your Microsoft Dynamics admin will need to configure this integration

Setup Step 1: Install the ActiveCampaign app

To install the ActiveCampaign app in Microsoft Dynamics:

1. Log into your Microsoft Dynamics account.

2. Go to the AppSource in your Microsoft Dynamics account. Search for ActiveCampaign.

3. **Click the "Get it now" button**.

4. A modal window will appear. Complete the information in the modal and **click the "Continue" button**.

5. Complete the rest of the steps to set up the ActiveCampaign app in your Microsoft Dynamics account.
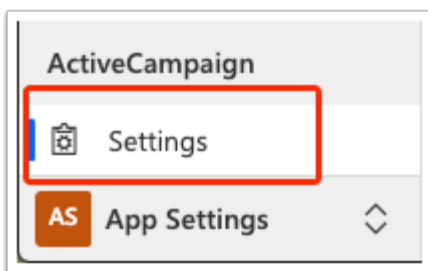
Setup Step 2: Connect ActiveCampaign to Microsoft Dynamics

1. From your Microsoft Dynamics account, locate "Sales Hub."

2. **Click the "S"** located at the bottom of the site map.

3. A modal window will appear. **Click "App Settings."**

4. Under the ActiveCampaign section of the site map, **click "Settings."** You may need to scroll down the site map to see this option.

5. Enter your [ActiveCampaign API URL and Key](#) into the fields provided.

6. **Click the "Connect" button**.

7. A confirmation window will appear. **Click the "OK" button**.

Your ActiveCampaign account is now connected to Microsoft Dynamics 365.

Setup Step 3: User management

Now that your ActiveCampaign account is connected to Microsoft Dynamics, you can assign permissions. These permissions dictate which Microsoft Dynamics users can use the ActiveCampaign Sales Actions available with this integration.

Permissions are assigned on the "User Management" page. To get there, **click "User Management"** located on the top navigation menu.
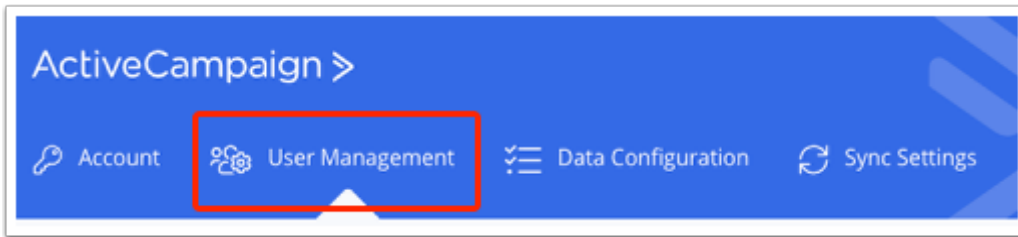
To assign permissions:

1. **Click the "Add User" icon**.
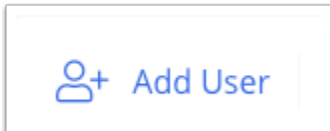
2. **Type the name** of the user into the search field that appears. As you type, Microsoft Dynamics will suggest names. **Click the user** you wish to assign permissions to.

3. **Click the "Add" button**.

Setup Step 4: Data configuration

Next, you need to select which contact and lead fields you need to sync. This is done on the "Data Configuration" page. To get there, **click "Data Configuration"** located on the top navigation menu.
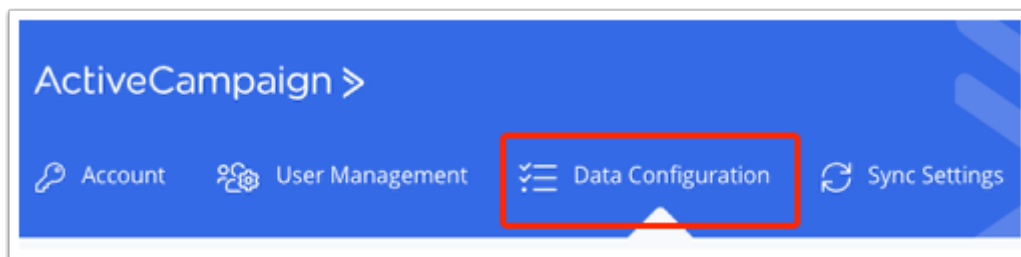
Some things to note on this page:

- All standard contact fields from ActiveCampaign are already mapped to standard contact and lead fields in Microsoft Dynamics
- You can only map custom contact fields from ActiveCampaign to custom lead or contact fields in Microsoft Dynamics
- You need to map fields marked as "Required" in Microsoft Dynamics. If you do not, an error will appear on the page
- Compatible field types will surface automatically when you map fields

If you do not wish to sync any fields for leads or contacts, **click the toggle** to set it to the "Off" position.

Click the links below to expand field mapping instructions for leads and contacts.

Configure leads mapping

1. **Click the "Leads" dropdown** and **click one of the following sync options**:

- **All leads created or updated**
  This is the easiest approach to sync all leads created or updated from this point forward. When a new lead is created or updated, they will automatically be created or updated in ActiveCampaign the next time the sync runs.
- **All leads that match certain criteria**
  You may want to use this option if you wish to sync leads that match certain criteria you set. For example, leads who come from a certain lead source. If the lead matches the criteria you set, they will be created or updated in ActiveCampaign the next time the sync runs.

2. If using "All leads created and updated":

- **Click the "Edit" button**
- **Click the** ActiveCampaign fields you wish to sync with Microsoft Dynamics. You can choose as many fields as you like
- **Click the "Add" button**
- **Click each dropdown** under the "Dynamics" column and **click the Dynamics field** you wish to map to
- **Click "Save Changes"**

3. If using "All leads that match certain criteria":

- **Select the field** you wish to use to segment your contacts
- **Choose the operator**
- **Enter a value for** the field
- **Click the "Add" button**
- A second segmenting option will appear. You may want to use this if you wish to narrow your criteria more. If you don't wish to narrow your criteria, **click the trash icon**
- To select and map custom fields, follow each item listed out in step 2 above
- **Click "Save Changes"**

Configure contacts mapping

1. **Click the "Contacts" dropdown** and **click one of the following sync options**:

- **All contacts created or updated**
  This is the easiest approach to sync all contacts created or updated from this point forward. When a new contact is created or updated, they will automatically be created or updated in ActiveCampaign the next time the sync runs.
- **All contacts that match certain criteria**
  You may want to use this option if you wish to sync contacts who match certain criteria you set. For example, contacts who come from a certain source. If the contact matches the criteria you set, they will be created or updated in ActiveCampaign the next time the sync runs.

2. If using "All contacts created and updated":

- **Click the "Edit" button**
- **Click the** ActiveCampaign fields you wish to sync with Microsoft Dynamics 365. You can choose as many fields as you like
- **Click the "Add" button**
- **Click each dropdown** under the "Dynamics" column and **click the Dynamics field** you wish to map to
- **Click "Save Changes"**

3. If using "All contacts that match certain criteria":

- **Select the field** you wish to use to segment your contacts
- **Choose the operator**
- **Enter a value for** the "Value" field
- **Click the "Add" button**
- A second segmenting option will appear. You may want to use this if you wish to narrow your criteria. If you don't wish to narrow your criteria, **click the trash icon**
- To select and map custom fields, follow each item listed out in step 2 above
- **Click "Save Changes"**

Setup Step 5: Sync Settings

Once you've completed the data configuration step, you can establish your sync settings. This is done on the "Sync Settings" page. To get there, **click "Sync Settings"** located on the top navigation menu.
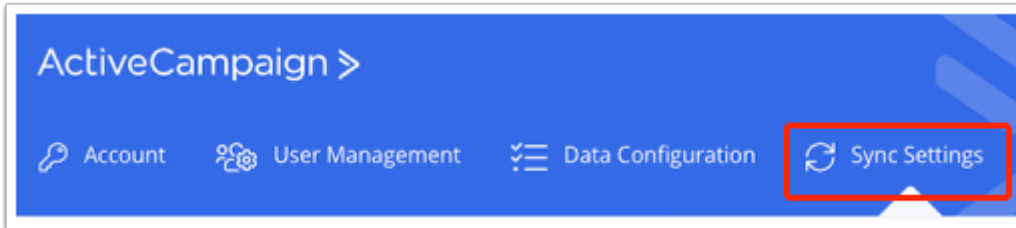
There are three different sync settings that you can configure: Global, Initial, and Job Schedule.
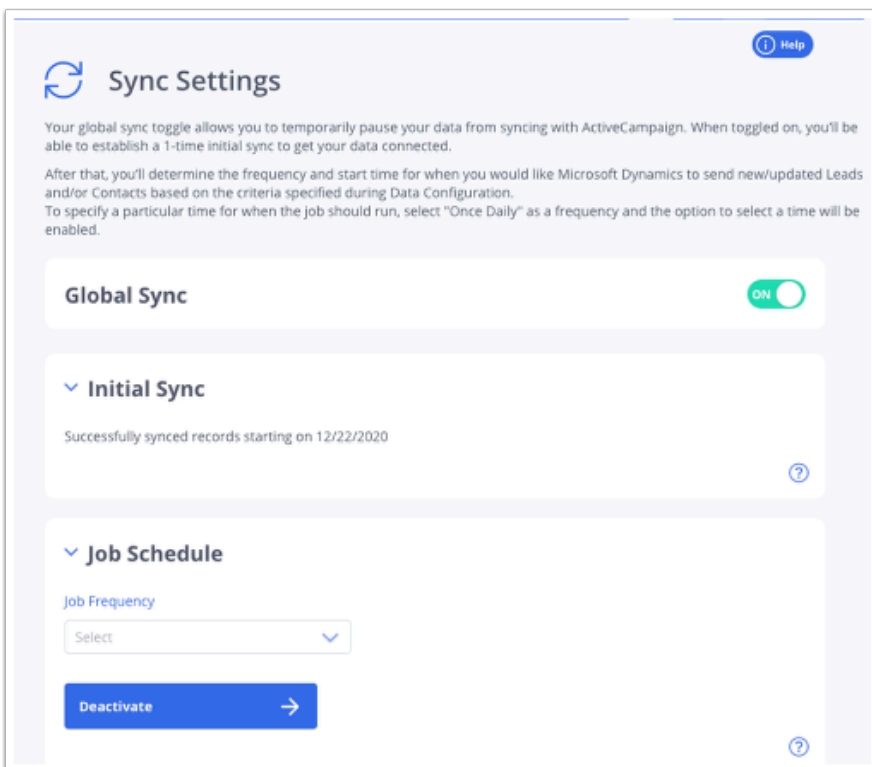
Global Sync

This is turned on by default. When on, the one-time "Initial Sync" will run.

To pause data from being synced to ActiveCampaign, **click the toggle** to set it to the "Off" position.

Data cannot sync from Microsoft Dynamics 365 to ActiveCampaign if this setting is turned off.

Initial Sync

This one-time sync runs when the "Global Sync" toggle is set to "On." All contacts or leads who meet your criteria under "Data Configuration" will be synced from Microsoft Dynamics to ActiveCampaign.

Job Schedule

This is where you configure recurring syncs between Microsoft Dynamics and ActiveCampaign.

To do so, **click the "Job Frequency" dropdown** then **click the schedule option** that works best for you. You can choose from the following frequency options:

- 1 hour
- 2 hours
- 4 hours
- 6 hours
- 8 hours
- 12 hours
- Once daily

The integration setup is now complete.

> ℹ️ It is not possible to force an immediate sync when contacts and leads are added to either platform. They will sync when the next scheduled sync runs.

Integration next steps

- Learn how syncing works with the ActiveCampaign Microsoft Dynamics 365 integration
- View recent marketing activities for synced leads and contacts
- Use Sales Actions to add leads and contacts to automations and email campaigns
- Use ActiveCampaign automation to create new leads and contacts in Microsoft Dynamics 365
- View and understand tags added to contacts from the ActiveCampaign Microsoft Dynamics 365 integration