

# Microsoft Dynamics CRM Upsert Activity

## Introduction

A Microsoft Dynamics CRM upsert activity updates an object on a Microsoft Dynamics CRM server and is used as a target in an operation. After configuring a Microsoft Dynamics CRM connection, you can configure as many Microsoft Dynamics CRM activities as you like for each Microsoft Dynamics CRM connection.

## Creating a Microsoft Dynamics CRM Activity

From the design canvas, open the **Connectivity** tab of the design component palette:



Within the **Endpoints** filter, click the Microsoft Dynamics CRM connection block to display activities that are available to be used with a Microsoft Dynamics CRM connection:



To create an activity that can be configured, the activity must first be added to an operation on the design canvas. To add an activity to an operation, drag the activity block from the palette to the operation.

For more information about the parts of an operation and adding activities to operations, see [Operation Creation and Configuration](#).

## Accessing Menu Actions

After a Microsoft Dynamics CRM activity has been added to an operation, menu actions for that activity are accessible from the project pane in either the **Workflows** or the **Components** tabs, and from the design canvas:

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- **Project Pane:** In the **Workflows** or **Components** tab of the project pane, hover over an activity name and click the actions menu icon to open the actions menu.
- **Design Canvas:** Within the operation, click an existing activity block to open the actions menu.

Each of these menu actions is available:

- **View/Edit:** This opens the activity configuration screen for you to configure the activity. For details, see *Configuring a Microsoft Dynamics CRM Upsert Activity* later on this page.
- **Delete:** This is used to permanently delete the activity.
- **Rename:** This positions the cursor on the activity name in the project pane for you to make edits.
- **View Dependencies:** This changes the view in the project pane to display any other parts of the project that the activity is dependent on.
- **Remove:** Available only from the actions menu on the design canvas, this removes the activity as a step in the operation without deleting it from the project. When you remove an activity that is adjacent to a transformation, if schemas are provided within that activity, they will no longer be referenced by the transformation. Removed components can be accessed or permanently deleted from the project pane.
- **Deploy:** This deploys the activity and any components it is dependent on.
- **Configurable Deploy:** This opens the deployment screen, where you can select project components to deploy.
- **Add to group:** This opens a prompt to create a new custom group or to add the component to an existing group.
- **Duplicate:** This creates a copy of the activity as a new, unreferenced component. Upon creating the component copy, the cursor is positioned on the component name within the project pane for you to rename the component.

## Configuring a Microsoft Dynamics CRM Upsert Activity

Follow these steps to configure a Microsoft Dynamics CRM upsert activity:


- Step 1 – Enter Basic Information
- Step 2 – Review Data Schema

### Step 1 – Enter Basic Information

The screenshot shows the configuration interface for a Microsoft Dynamics CRM Upsert activity. At the top, there are two numbered steps: 1 (active) and 2. The 'NAME' field contains the text 'Upsert'. Below this is a section titled 'Select an Object' with a search box and a 'Refresh' button. A table displays the following objects:

Name	Description
account	Business that represents a customer or potential customer. The company that is billed in business transactions.
accountheads	
activityinattachment	MIME attachment for an activity.
activityparty	Person or group associated with an activity. An activity can have multiple activity parties.
activitypointer	Task performed, or to be performed, by a user. An activity is any action for which an entry can be made on a calendar.

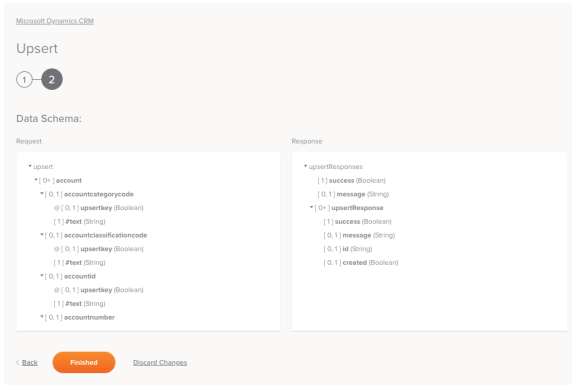
At the bottom of the screen, there are two buttons: 'Next' and 'Discard Changes'.

- **Name:** Enter a name to use to identify the Microsoft Dynamics CRM upsert activity. The name must be unique for each upsert activity and must not contain forward slashes (/) or colons (:).
- **Select an Object:** This section displays objects available in the Microsoft Dynamics CRM endpoint. When reopening an existing activity configuration, only the selected object is displayed instead of reloading the entire object list.
  - **Selected MS CRM Object:** After an object is selected, it will be listed here.
  - **Search:** Enter any part of the object name into the search box to filter the list of objects. The search is not case-sensitive. If objects are already displayed within the table, the table results will be filtered in real time with each keystroke. To reload objects from the endpoint when searching, enter search criteria and then refresh, as described below.
  - **Refresh:** Click the refresh icon  or the word **Refresh** to reload objects from the Microsoft Dynamics CRM endpoint. This action refreshes all metadata used to build the table of objects displayed in the configuration.
  - **Select an Object:** Within the table, click anywhere on a row to select an object. Only one object can be selected. The information available for each object is fetched from the Microsoft Dynamics CRM endpoint:
    - **Name:** The object name from Microsoft Dynamics CRM.
    - **Description:** The object description from Microsoft Dynamics CRM.

**TIP:** If the table does not populate with available objects, the [Microsoft Dynamics CRM connection](#) may not be successful. Ensure you are connected by reopening the connection and retesting the credentials.

- **Save & Exit:** If enabled, click to save the configuration for this step and close the activity configuration.
- **Next:** Click to temporarily store the configuration for this step and continue to the next step. The configuration will not be saved until you click the **Finished** button on the last step.
- **Discard Changes:** After making changes, click **Discard Changes** to close the configuration without saving changes made to any step. A message will ask you to confirm that you want to discard changes.

## Step 2 – Review Data Schema



- **Data Schema:** The request and response data schemas for Microsoft Dynamics CRM will be displayed. If the operation uses a transformation, the data schemas will be displayed again later during the transformation mapping process, where you can map to target fields using source objects, scripts, variables, custom values, and more.

The Microsoft Dynamics CRM connector uses the [Microsoft Dynamics 365 Entity Reference](#). Refer to the API documentation for information on the schema fields.

- **Back:** Click to temporarily store the configuration for this step and return to the previous step.
- **Finished:** Click to save the configuration for all steps and close the activity configuration.
- **Discard Changes:** After making changes, click **Discard Changes** to close the configuration without saving changes made to any step. A message will ask you to confirm that you want to discard changes.

## Next Steps

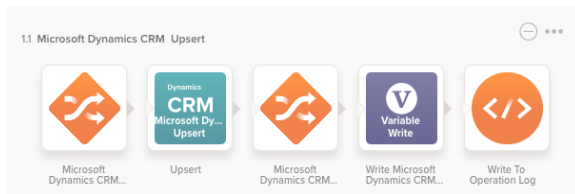
After configuring a Microsoft Dynamics CRM upsert activity, complete the configuration of the operation by adding and configuring other activities, transformations, or scripts as operation steps. You can also configure an operation's operation settings, which include the ability to chain operations together that are in the same or different workflows.

Microsoft Dynamics CRM upsert activities can be used as a target with these operation patterns:

- [Transformation Pattern](#)
- [Two-Transformation Pattern](#) (as the first or second target)

Other patterns are not valid using Microsoft Dynamics CRM upsert activities. See the validation patterns on the [Operation Validity](#) page.

An example of using the activity in an operation:



To use the activity with scripting functions, write the data to a temporary location and then use that temporary location in the scripting function.

When ready, deploy and run the operation and validate behavior by checking the operation logs.