

WorkCast's Microsoft Dynamics 365 Integration - made simple

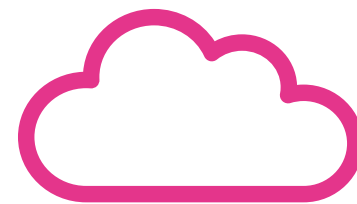
WorkCast



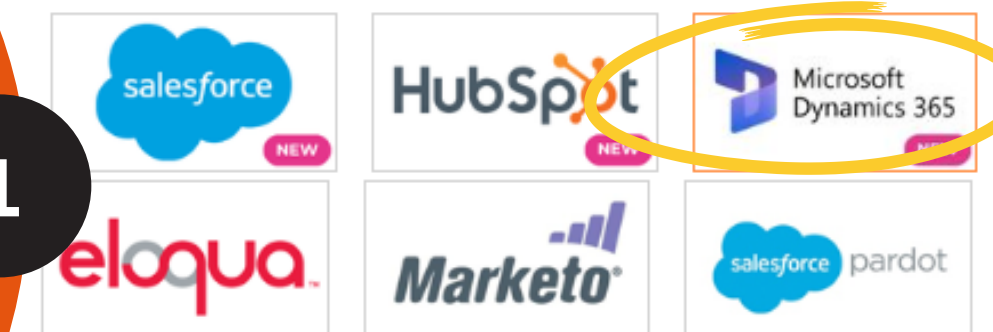
Dynamics 365 +

WorkCast

The integration takes just minutes to set up, turning your webinar data into powerful and informed CRM intelligence



Log In

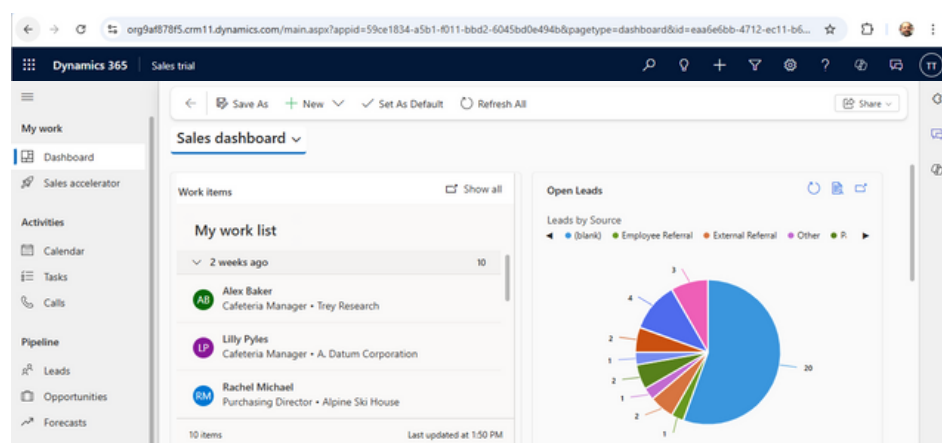


Select 'Integrations' in the top menu and select 'Dynamics'

2

Find your Dynamics environment

Copy the MS365 environment URL from your browser. This is the base address you see after signing in, ie:
`org9af478s5.crm11.dynamics.com`



Authentication

When connecting through WorkCast, you'll be prompted to log in to Microsoft Dynamics via a secure pop-up window. This uses Microsoft's approved OAuth2 authentication, so there's no need for additional access keys. Just a quick, secure sign-in

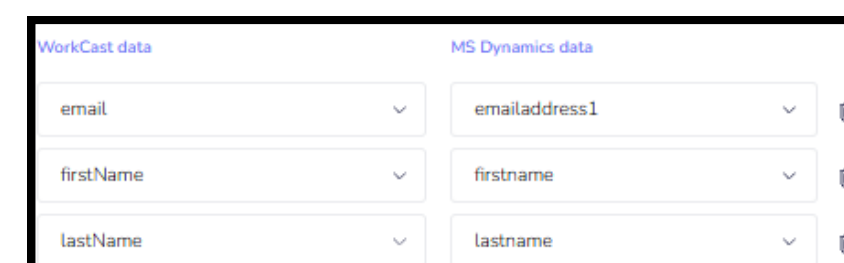
3



True Business Intelligence

Access rich behavioral data, such as our Webinar Engagement Score and minutes viewed, to give your team a deeper understanding of attendee interest and intent

Map where you want the data



Select where the data should go in Microsoft Dynamics. WorkCast adds engagement insights and updates lead or contact timelines without changing your existing records

5

4