

# Customer Voice Response on the Contact Form

My user case was quite simple. I wanted a **sub-grid** on my **contact** that showed all the survey responses that had been completed with the relevant fields in the view. From these I want to create a number field that calculated the average NPS score.

The screenshot shows the Microsoft Dynamics 365 Contact form for 'Patrick Kitchell'. The top navigation bar includes 'Summary', 'Details', 'Scheduling', 'Survey' (which is selected), and 'Related'. On the right, there's a summary card for 'Average NPS Score' with a value of '7.17' and a 'System Administrator' owner. Below the navigation, a sub-grid titled 'Responses' displays six rows of survey data. Each row contains columns for Date Created, Regarding, Respondent email add..., NPS S..., Sentiment, Survey Invite, Survey, and Survey response. The rows show various survey entries with different dates, respondents, and scores. A tooltip at the bottom left indicates 'Rows: 6'.

## Customer Service Responses(Regarding)

When trying to add a **subgrid** in the **Form Designer** it shows the **Customer Voice, Alert, Invites and Responses** as **regarding** fields on these entities.

The screenshot shows the Microsoft Dynamics 365 Form Designer for a 'Survey' entity. The 'Survey' tab is selected in the ribbon. A subgrid is being configured, with its 'Label' set to 'Responses' and 'Name' set to 'Subgrid\_new\_1'. In the 'Properties' panel on the right, the 'Show related records' checkbox is checked and highlighted with a red box. Other properties shown include 'Display options' (with 'Hide label' and 'Hide on phone' options), 'Table' (set to 'Customer Voice survey responses'), and 'Default view' (set to 'All Survey responses').

This means that for this **subgrid** to populate the **Customer Voice Survey Response** must be **regarding** the Contact and this field doesn't populate automatically.

New Customer Voice survey response - Unsaved  
Customer Voice survey response

General Related ▾

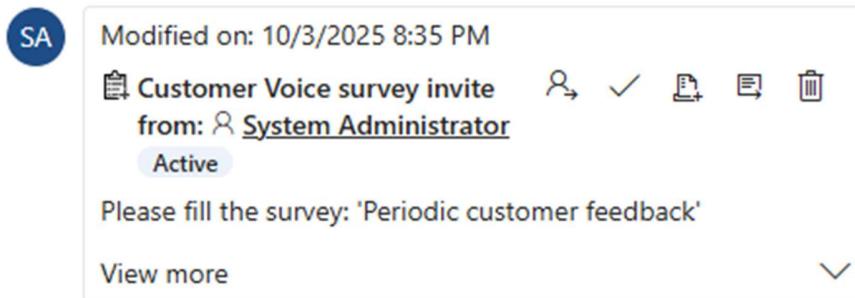
General

Name	1	Subject	*
From	Patrick Kitchell	Survey Invite	Please fill the survey: 'Periodic customer feed...
Survey	Periodic customer survey	Start Date	9/26/2025 8:51 PM
Regarding	---	ResponseType	

### Customer Voice Alert, Invite and Responses are Activities

The **Customer Voice Alert**, **Customer Voice Invite** and **Customer Voice Response** are **activities** that end up in the Timeline of a Contact. The invite is an activity type and uses the “**TO**” field and the response is an activity type and uses the “**FROM**” field. Both fields are **PARTYID** fields and polymorphic in nature.

#### Invite:



#### Response:

SA

Modified on: 10/3/2025 10:25 PM

Customer Voice survey response from:  
 System Administrator  
Active

Please fill the survey: 'Periodic customer feedback'  
help

[View more](#)



## Testing Sending Invites Via Email Client

One thing that I realized early on is that the **Customer Voice Responses** when sent out via the inbuilt email client doesn't use the regarding field. It is only available if I used the advance upload .csv file. This file came with RegardingID,RegardingEntityName in the download.

This is a hassle because most end users know nothing about getting RegardingIDs and RegardingEntityName or:

```
"_partyid_value@Microsoft.Dynamics.CRM.lookuplogicalname": "contact",  
"_partyid_value": "5a25e427-1892-f011-b4cb-000d3a170c2c",
```

## IMPORT CONTACTS

Add contacts in bulk by uploading a .CSV file. [Download template](#)

Upload file

▼ Guidelines

^ Advanced options

Add multiple languages and connect responses with your Dynamics 365 customer data by adding advanced options. [Download advanced template.](#)

Email

First name

Last name

Country

City

customer@contosot.com

Patti

Melendez

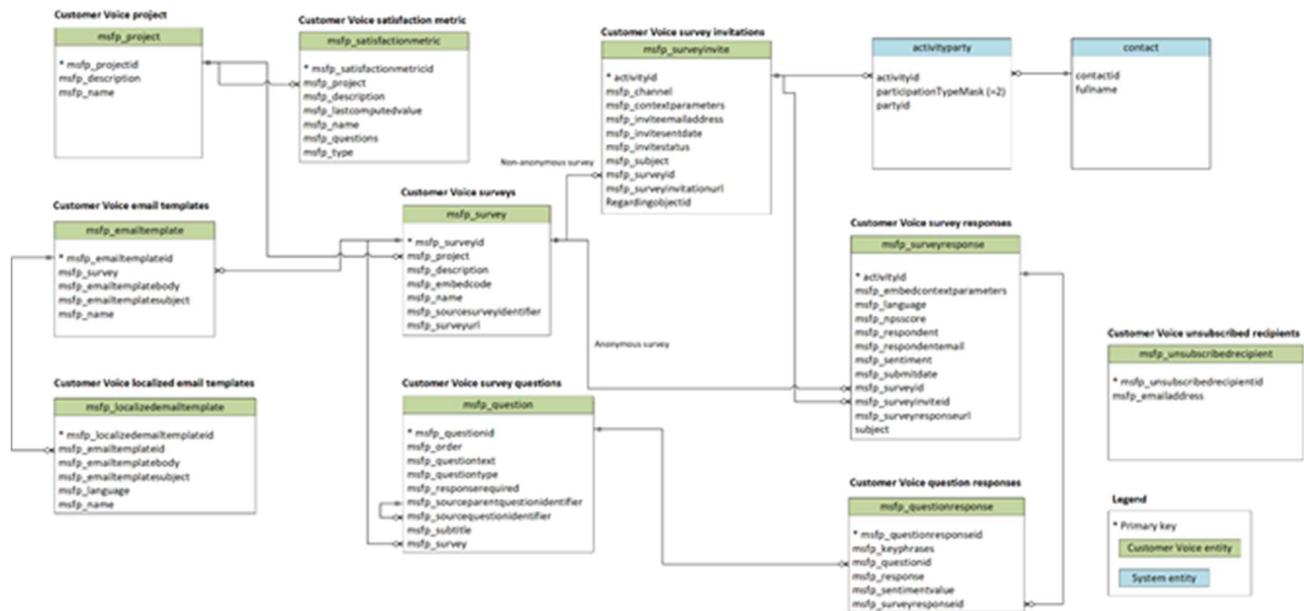
USA

Seattle

In the start I wanted to test the Customer Voice and this is the quickest way. Once Customer Voice and Dynamics is hooked up then distributing the Survey via the email client with known( or unknown) contacts will create the invite and the potential response as shown about in the TO/FROM field on the respective activity table.

## Entity Map

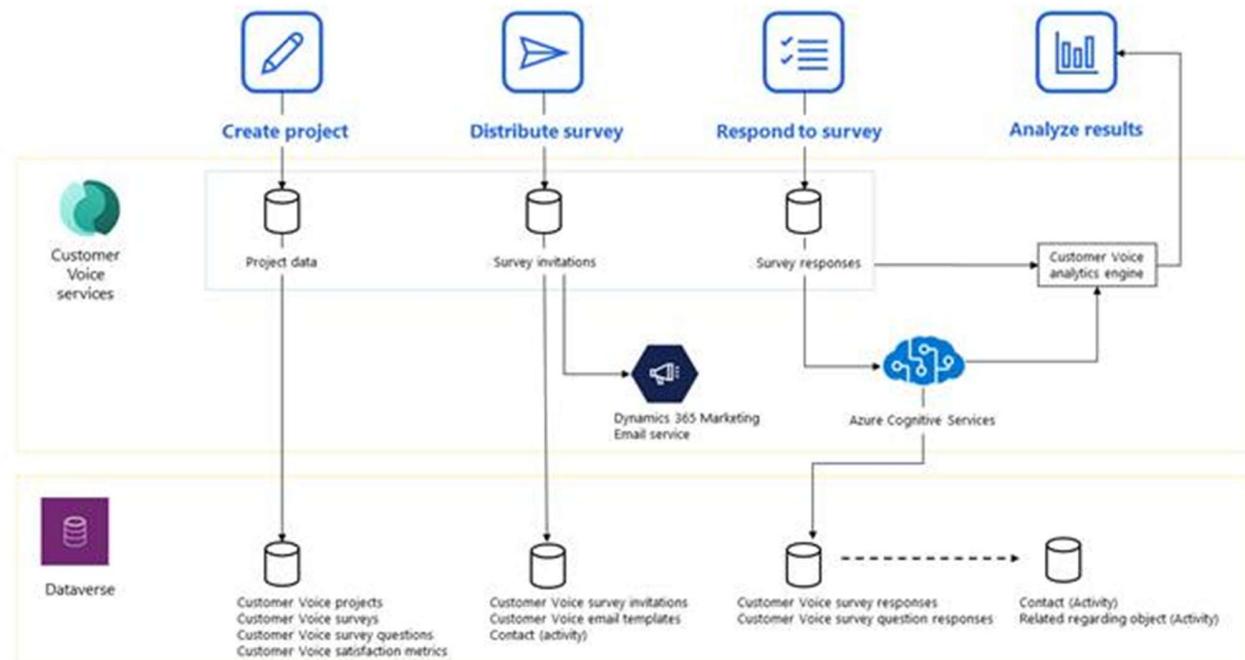
This is important as all the Customer Voice Survey Entities are in Dynamics 365 and these can be shown on records and used in varies ways to notify about the Survey Responses, Metrics and Alerts. The Entity Reference is here: <https://learn.microsoft.com/en-us/dynamics365/customer-voice/developer/entity-reference>



## Data Flow

Also, understanding the flow of data as it relates to the survey and how to find these entities in the system is also important. The Data Flow is in this diagram and found here:

<https://learn.microsoft.com/en-us/dynamics365/customer-voice/data-flow>



## I Added the Important Entities to the Sales App in a New Areas

It should be noted that from the data flow diagram that the flow is one way from Customer Voice App to dataverse and the documentation states not to delete data that surveys rely on via dataverse like metrics.

The screenshot shows a list view titled "Active Surveys". The left sidebar contains a navigation menu with sections like Home, Recent, Pinned, New Group, and various Customer Voice-related items. The main area displays a single survey entry:

Name	Friendly name	Project
Periodic customer survey	Periodic customer fee...	Periodic customer fee...

At the bottom, there is a footer bar with a "Rows: 1" indicator and a "Customer Voice" ribbon tab.

## Back to My User Story.

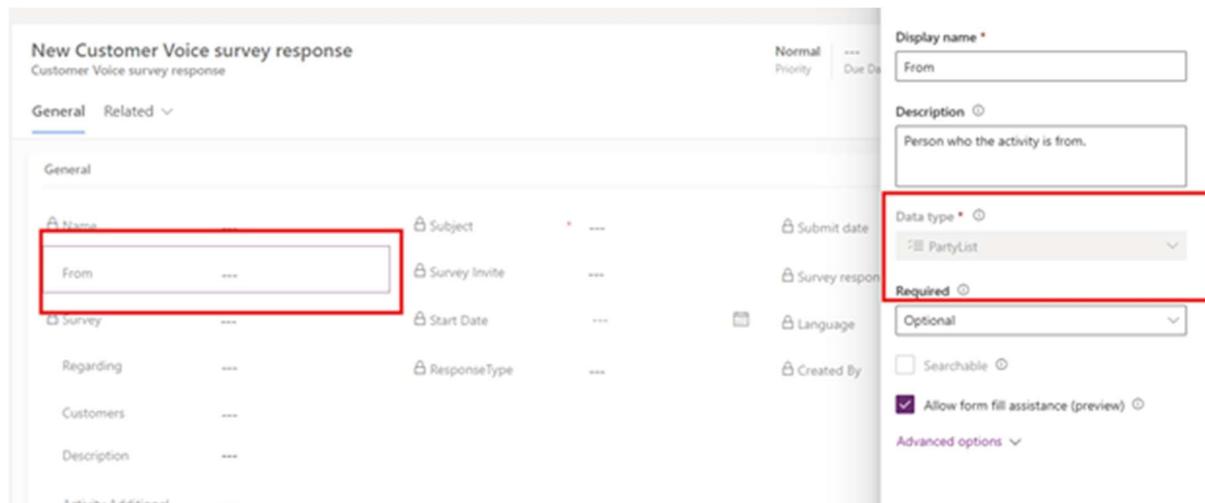
I want to leverage the out of the box relationships and populate the regarding field on the Customer Voice Response automatically. That is to copy the data from the "**FROM**" field to the "**REGARDING**" field on the Customer Voice Response.

### How Hard Can This Be?

My original thought was to make a business rule that populated the regarding field.

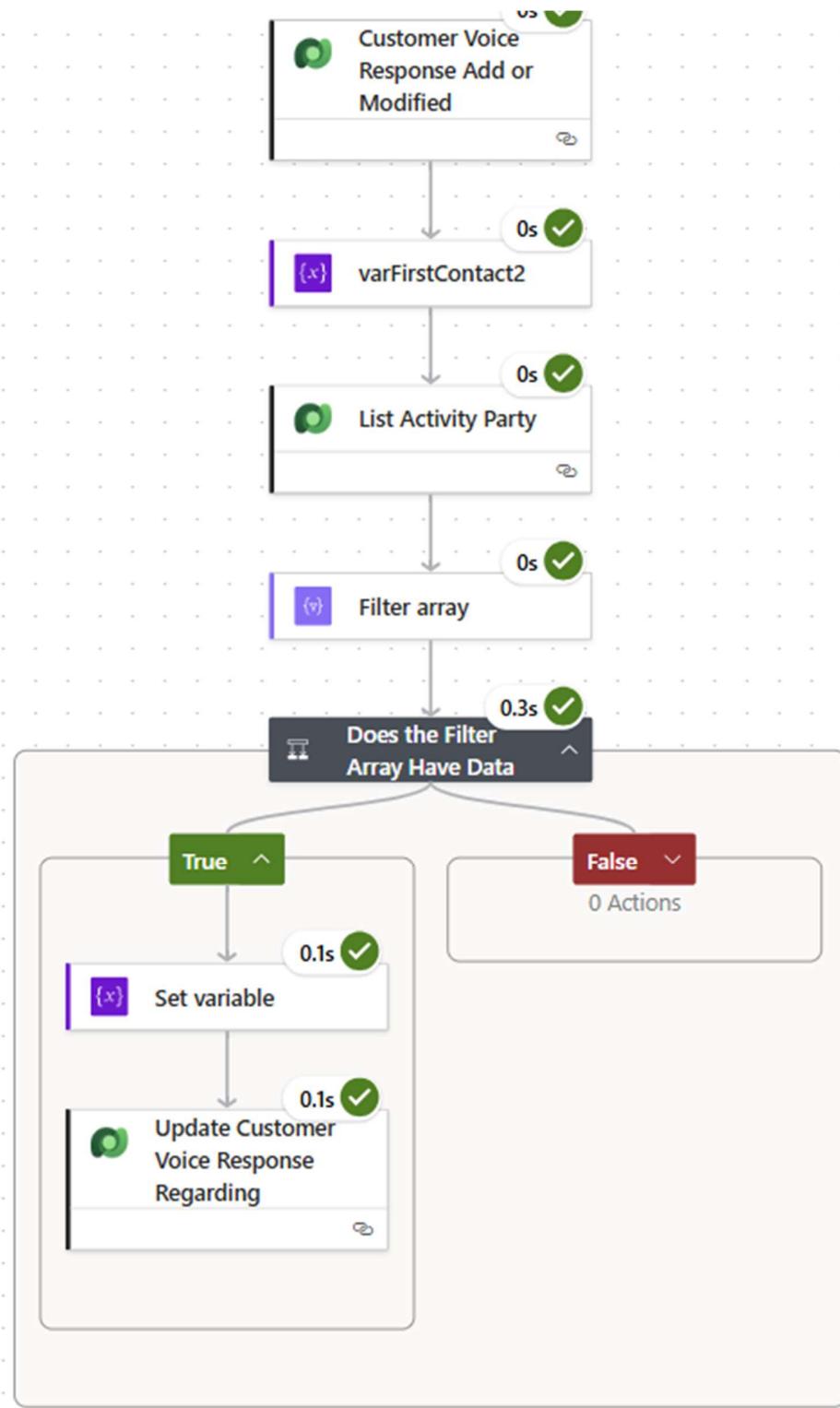


As it turns out that this is not possible because both are polymorphic and point to more than one entity and the **FROM** field in a **PartyID** field which is a special field Dataverse



Because of this I couldn't use a business rule to what I needed and I add to turn to power automate. Due to the use of an activity entity it was a bit tricky to figure out and thanks to ChatGPT – I was able to get this to work.

### **Power Automate:**



Basically the flow finds the **Activity Party Value** and **GUID** of the contact and makes it possible to populate the regarding field.

### List Activity Parties

When a Customer Voice Survey Response is made I am listing the activity parties this filter to grab the "**FROM**" (participationtypemask eq 1) Field:

Table name \*

Activity Parties

Select columns

Enter a comma-separated list of column unique names to limit which columns are listed

Filter rows

\_activityid\_value eq body/activityid and participationtypemask eq 1

This returns a bunch of activity party data from the Customer Voice Response Activity and I am my case I am particularly looking for this chunk:

```
"_partyid_value@OData.Community.Display.V1.FormattedValue": "Patrick Kitchell",
"_partyid_value@Microsoft.Dynamics.CRM.associatednavigationproperty": "partyid_contact",
"_partyid_value@Microsoft.Dynamics.CRM.lookuplogicalname": "contact",
"_partyid_value@odata.type": "#Guid",
"_partyid_value": "5a25e427-1892-f011-b4cb-000d3a170c2c",
```

**This field** "\_partyid\_value": "5a25e427-1892-f011-b4cb-000d3a170c2c," is the contact ID that is populated in the "**FROM**" Field

Now that I have this information - I need to be able to grab it and move it. I am using the

**Filter Array to grab this information:**

From \*

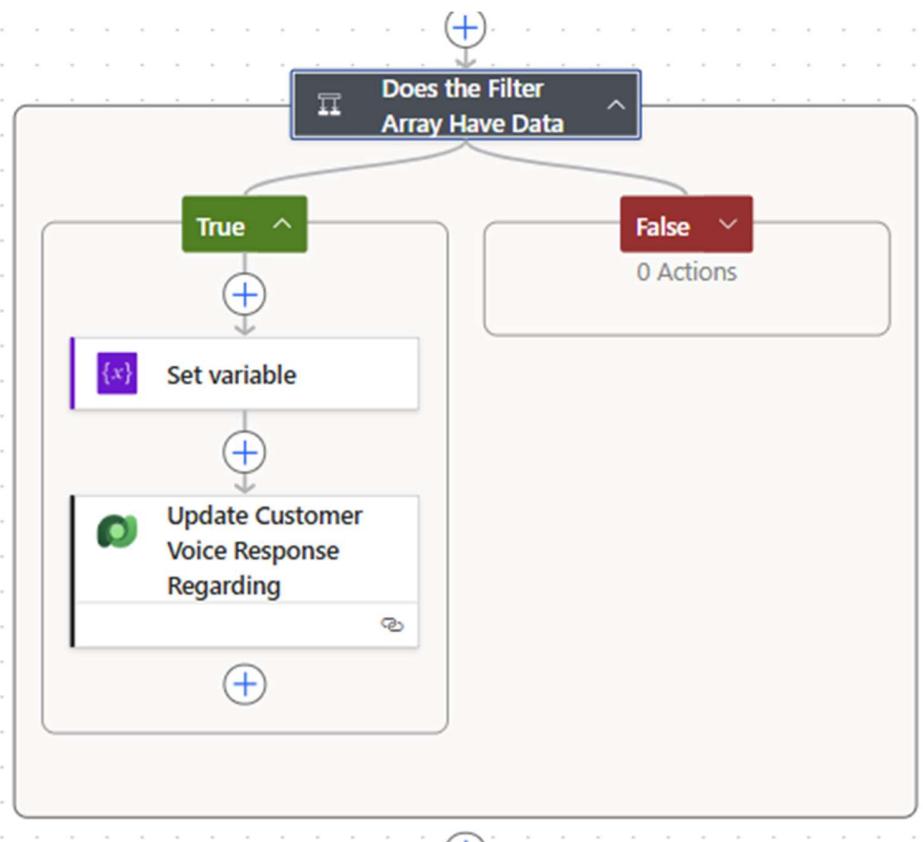
 body/value X

Filter Query \*

 \_partyid\_value@... X is equal to contact

[Edit in advanced mode](#)

Like many polymorphic fields this field could hold data from another entity than a Contact and therefore I am using a **condition** to check if it returns contact data when listing the activityparty or not. If not than the condition is False.



Looking closer at the **Filter Array** it grabs PARTYID Value = CONTACT

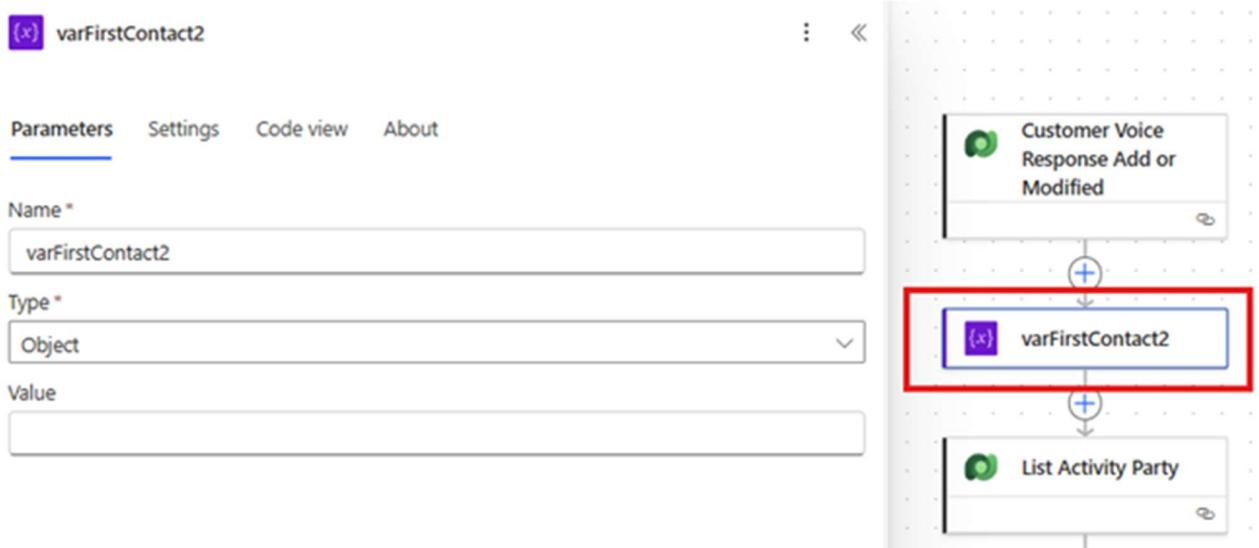
"\_partyid\_value@Microsoft.Dynamics.CRM.associatednavigationproperty": "partyid\_contact",

"\_partyid\_value@Microsoft.Dynamics.CRM.lookuplogicalname": "contact"

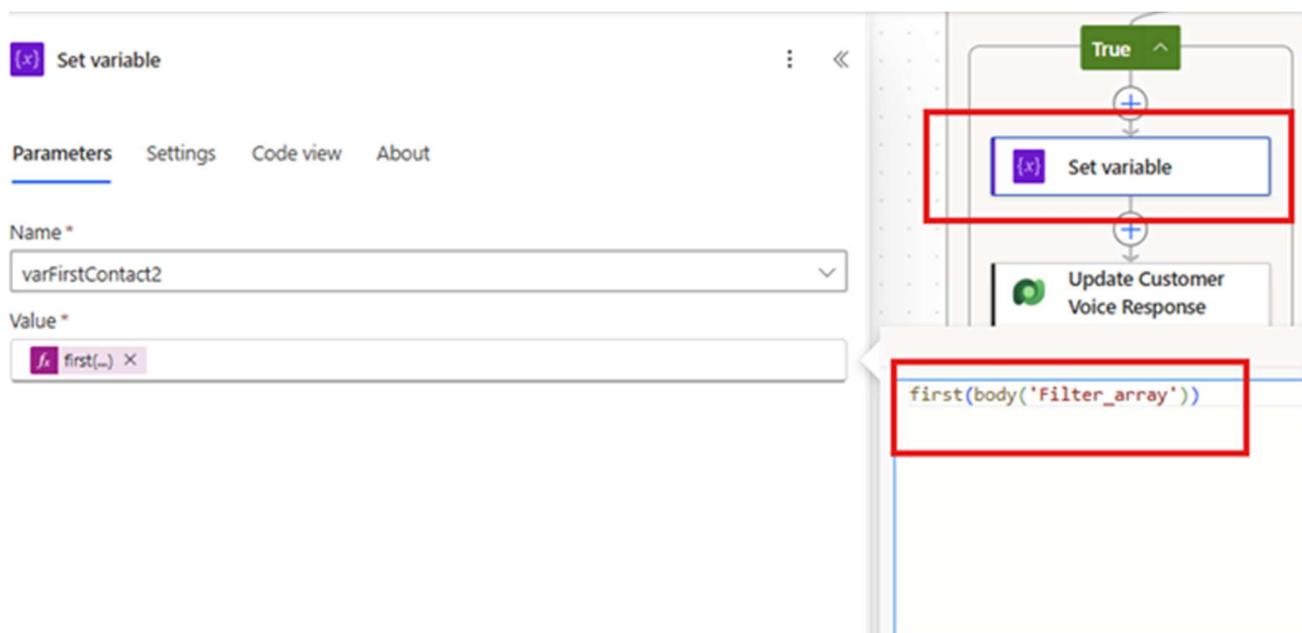
If the Filter Array body doesn't contain this than it is False in my Power Automate.

### VarFirstContact2

Earlier in the Flow I created an empty object variable that will be populated with GUID of the from PARTY VALUE that we capture in the Filter Array.



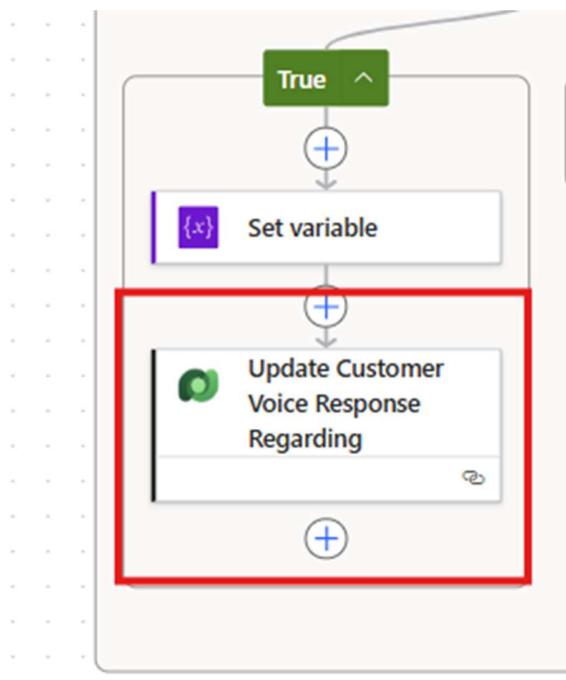
If the condition is true in that the Filter Array has PartyID Values this it sets the GUID in this variable



## Set Regarding

The last step is to update the Customer Voice Response Regarding with the following:

```
/contacts(@{variables('varFirstContact2')}?['_partyid_value'])
```



## Final thoughts

This a huge work around for something that I was hoping was more simple, less complex. The good thing about the power automate is that it can be used on all activities with minor modifications