

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.

PKPatrick Kitchell - SavedContact - Contact

7.17Average NPS ScoreSASystem AdministratorOwner

SummaryDetailsSchedulingSurveyRelated

Form assist

Responses

+New Customer Voice s...

<input type="checkbox"/>	Date Created	Regardi...	Respondent e...	NPS S...	Sentiment	Survey Invite	Survey	Survey response ...
<input type="checkbox"/>	10/2/2025 7:4...	Patrick Kit...	patrickkitchell...	10	Positive	Please fill the survey: 'Per...	Periodic customer s...	https://customervoi...
<input type="checkbox"/>	10/3/2025 8:3...	Patrick Kit...	patrickkitchell...	1	Negative	Please fill the survey: 'Per...	Periodic customer s...	https://customervoi...
<input type="checkbox"/>	9/26/2025 8:5...	Patrick Kit...	patrickkitchell...	8	Neutral	Please fill the survey: 'Per...	Periodic customer s...	https://customervoi...
<input type="checkbox"/>	9/26/2025 8:5...	Patrick Kit...	patrickkitchell...	4	Negative	Please fill the survey: 'Per...	Periodic customer s...	https://customervoi...

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.

SurveyRelated

+New Cust

ing	Respondent email add...	N...	Sentiment	Survey Invite	Survey	S...
No data available						

Conversation Participant Insights (User)

Conversations (Customer)

Conversations (Regarding)

Copilot Transcripts (Regarding)

Customer Relationships (Party 1)

Customer Relationships (Party 2)

Customer Voice alert (Regarding)

Customer Voice survey invites (Regarding)

Customer Voice survey responses (Regarding)

dailycomplaints (Contact ID)

Documents (Regarding)

Duplicate Records (Base Record in...

Properties

Display options

Label *Responses

Name *Subgrid_new_1

☐ Hide label

☐ Hide on phone

☒ Show related records

TableCustomer Voice survey respo...

Default viewAll 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 feedb...
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:

SA

Modified on: 10/3/2025 8:35 PM

Customer Voice survey invite

from: System Administrator

Active

Please fill the survey: 'Periodic customer feedback'

View more

Person icon

Checkmark

Document icon

Comment icon

Trash icon

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 doesnt 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 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

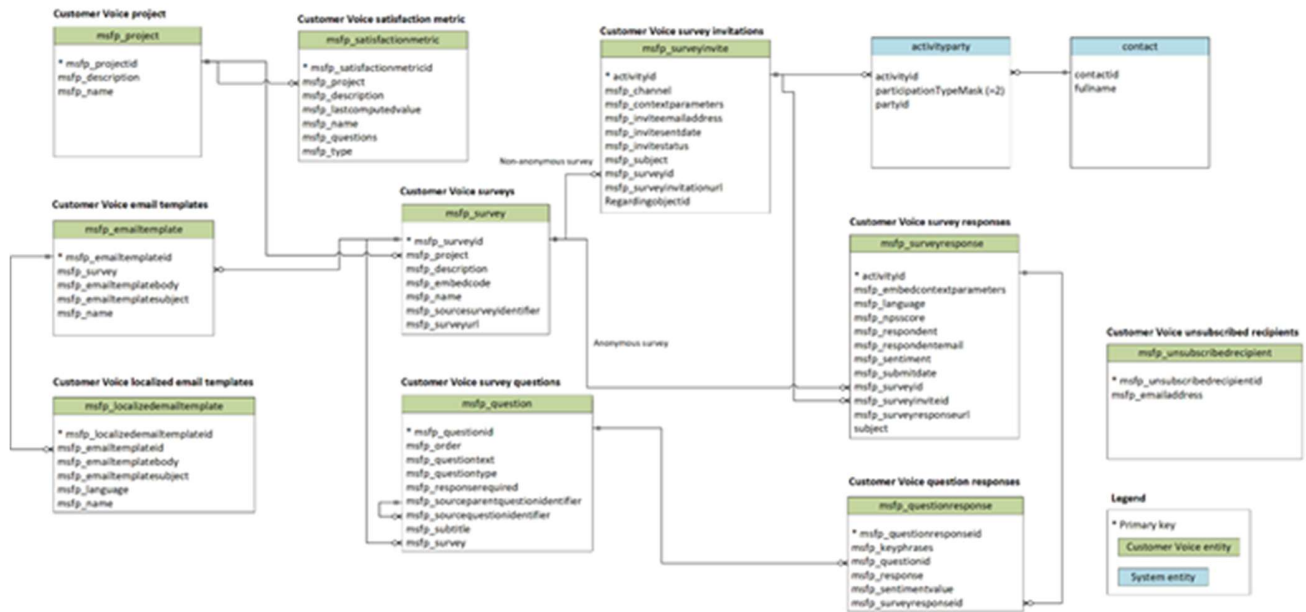
Add multiple languages and connect responses with your Dynamics 365 customer data by adding advanced options. [Download advanced template.](#)

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

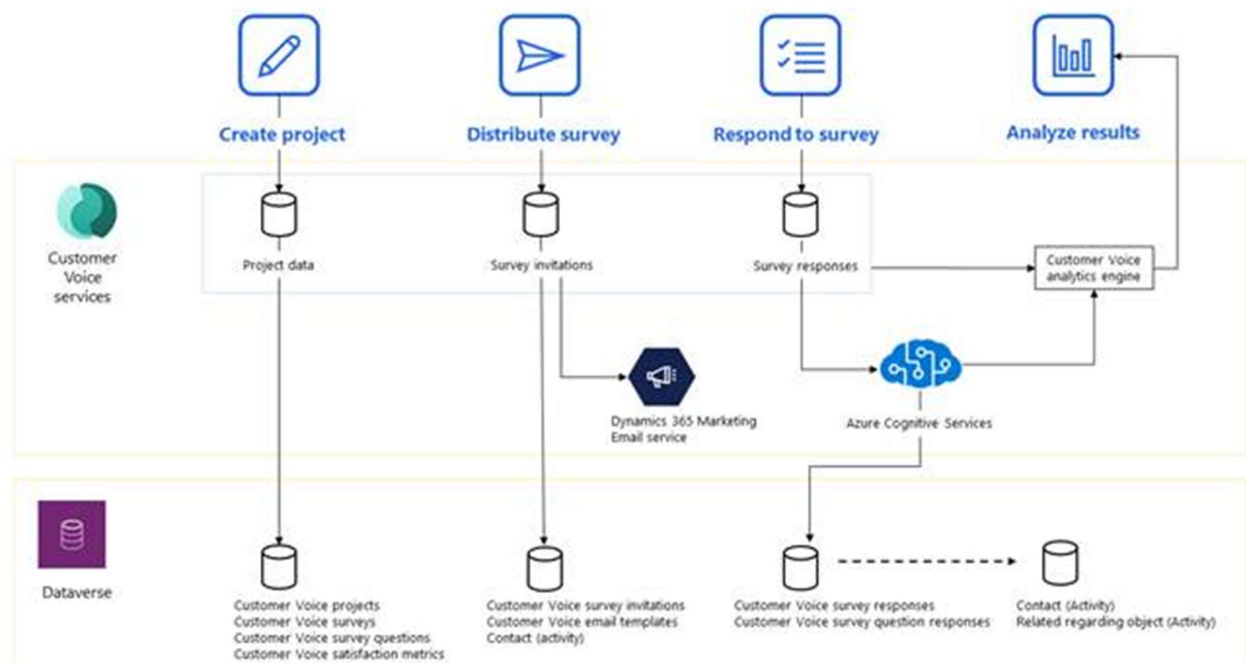
This is important as all the Customer Voice Survey Entities are in Dynamics 365 and these can be shown on records and used in varies ways to notify about the Survey Responses, Metrics and Alerts. The Entity Reference is here: <https://learn.microsoft.com/en-us/dynamics365/customer-voice/developer/entity-reference>



Data Flow

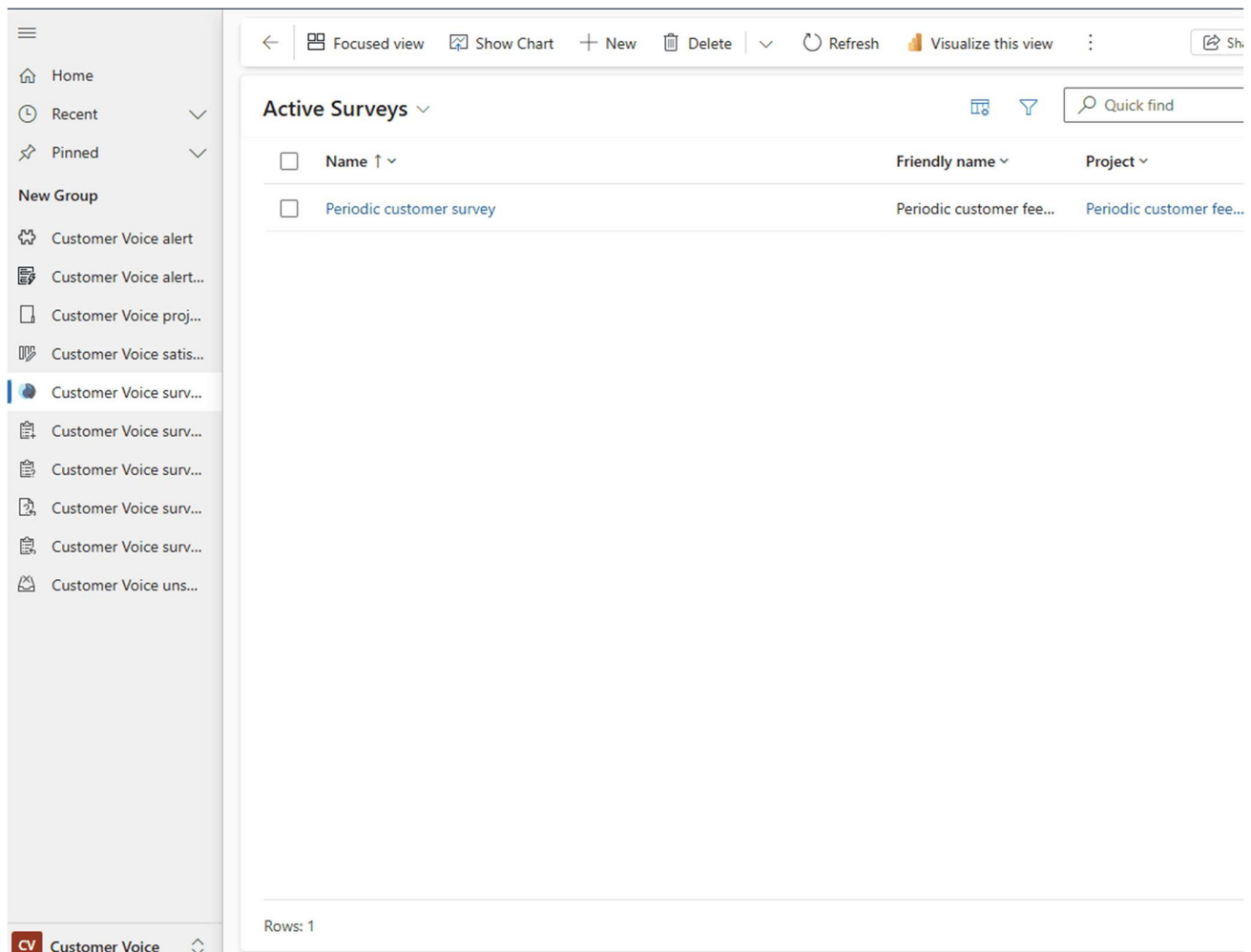
Also, understanding the flow of data as it relates to the survey and how to find these entities in the system is also important. The Data Flow is in this diagram and found here:

<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 displays the 'Customer Voice' application interface. On the left is a navigation pane with a 'New Group' section containing several items, including 'Customer Voice surv...'. The main area shows a table titled 'Active Surveys' with columns for 'Name', 'Friendly name', and 'Project'. A single row is visible, representing a 'Periodic customer survey'. The interface includes standard controls like 'New', 'Delete', 'Refresh', and a 'Quick find' search bar.

<input type="checkbox"/>	Name ↑ ▾	Friendly name ▾	Project ▾
<input type="checkbox"/>	Periodic customer survey	Periodic customer fee...	Periodic customer fee...

Rows: 1

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.

Name	5	!
From	Patrick Kitchell x	!
Survey	Periodic customer sur...	!
Regarding	Patrick Kitchell x	!
Customers	---	!

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

New Customer Voice survey response

Customer Voice survey response

General Related

General

Name	Subject	Submit date
From	Survey invite	Survey response
Survey	Start Date	Language
Regarding	ResponseType	Created By
Customers		
Description		

Display name *

From

Description ⓘ

Person who the activity is from.

Data type *

PartyList

Required ⓘ

Optional

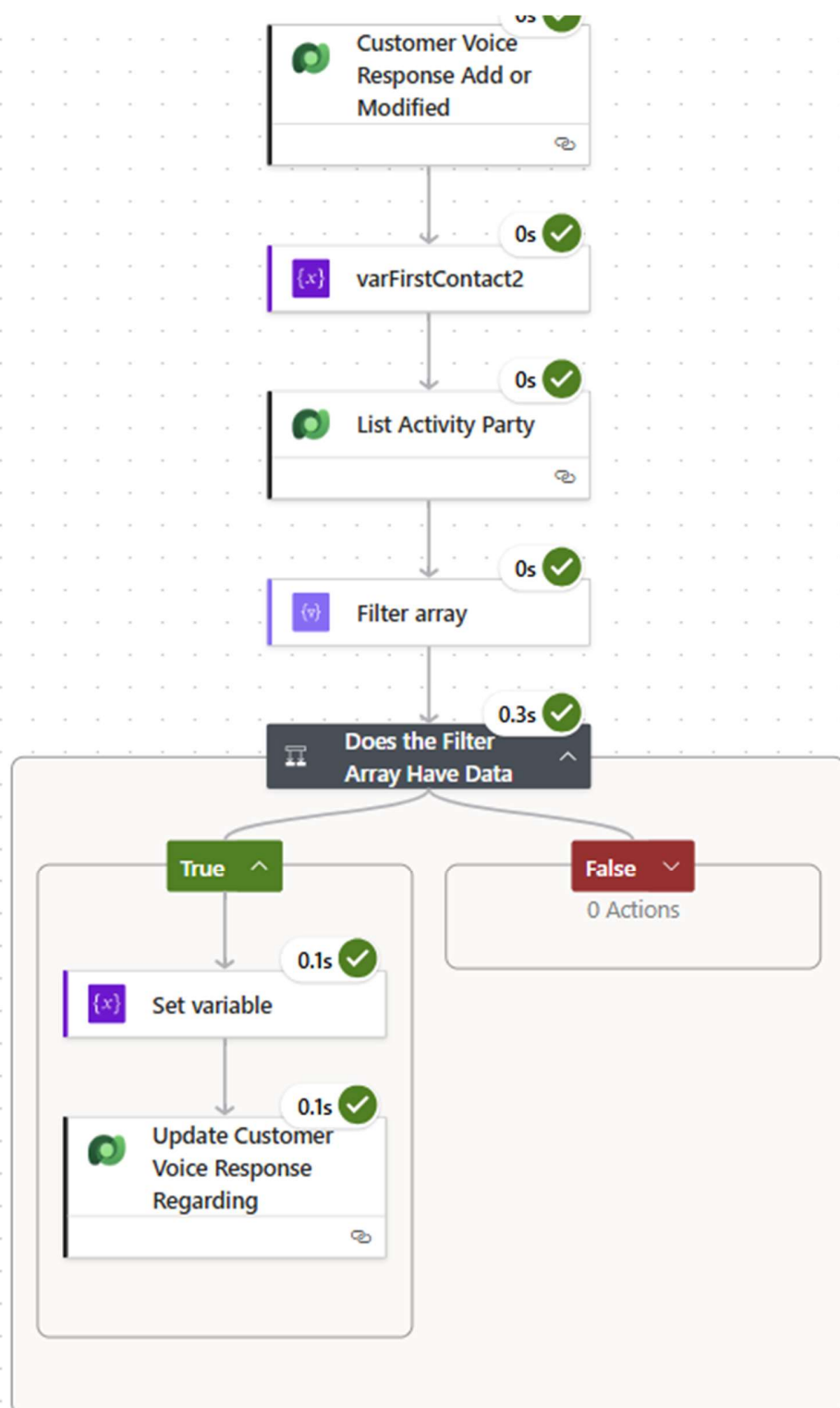
Searchable ⓘ

Allow form fill assistance (preview) ⓘ

Advanced options

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:

The screenshot shows a query builder interface with three sections: 'Table name *' with a dropdown set to 'Activity Parties', 'Select columns' with a text input for column names, and 'Filter rows' which is highlighted with a red box. The 'Filter rows' section contains a filter expression: '_activityid_value eq body/activityid' followed by a green circle icon, a close button 'X', and '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:

Parameters Settings Code view About

From *

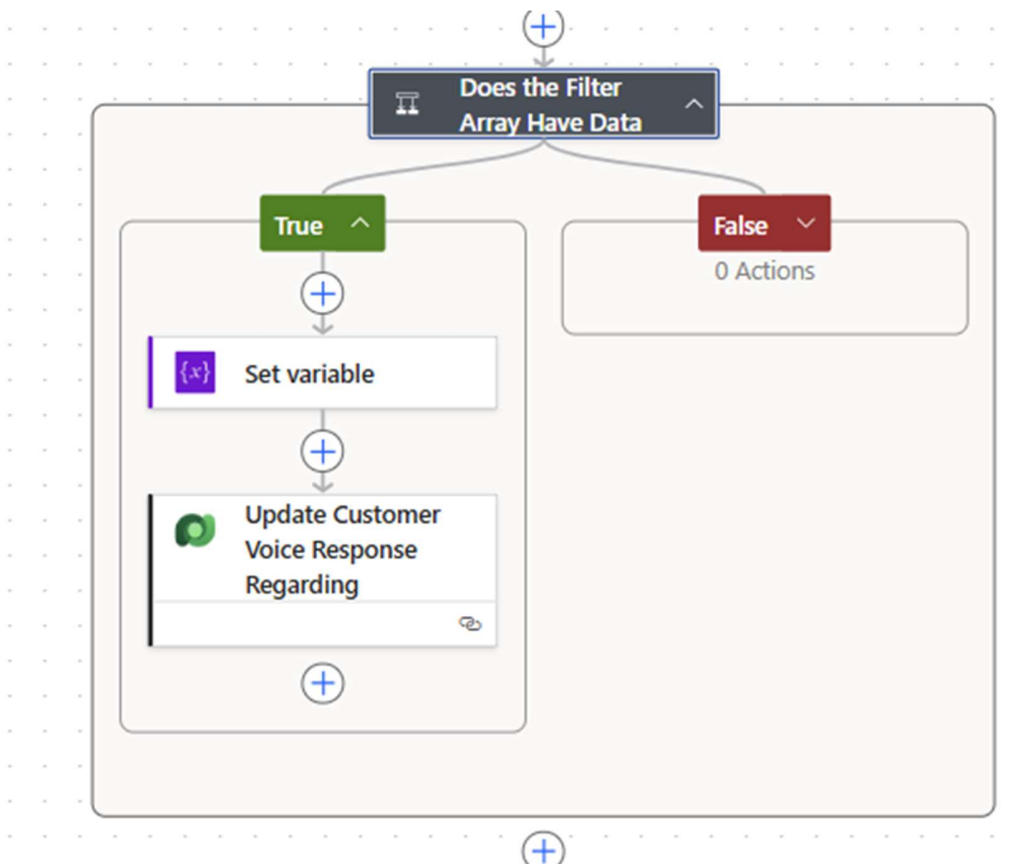
body/value X

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"

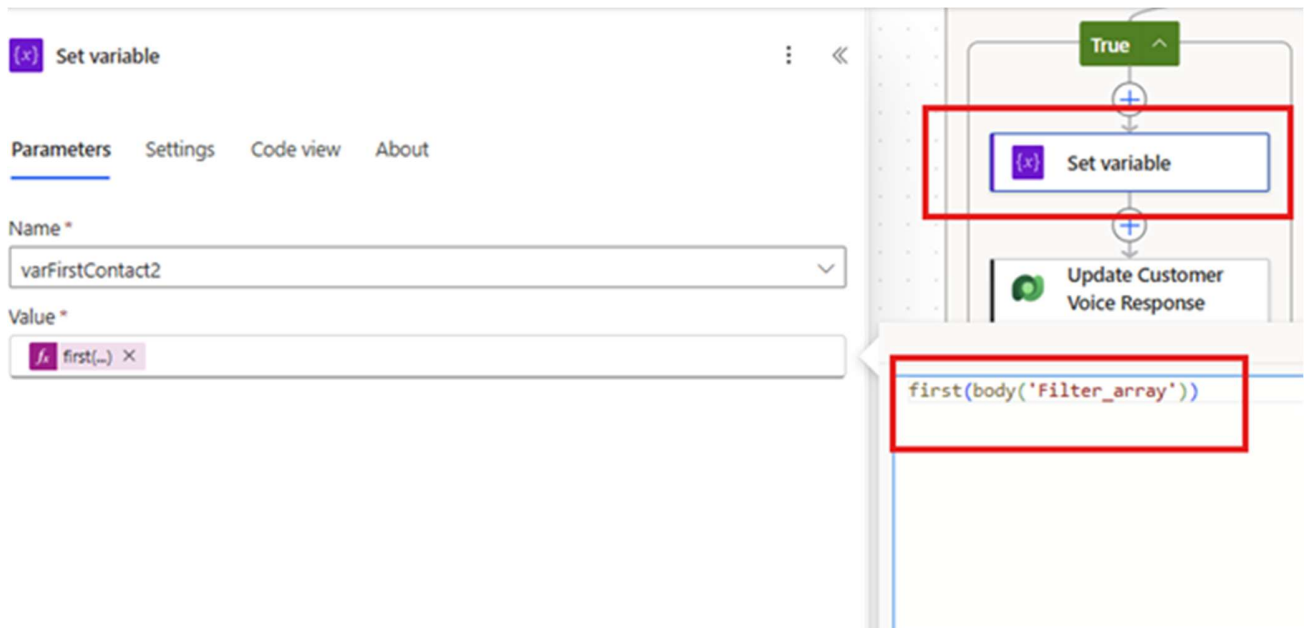
If the Filter Array body doesn't contain this than it is False in my Power Automate.

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.

The image shows two parts of the Power Automate interface. On the left is the 'Parameters' tab for a variable named 'varFirstContact2'. The 'Name' field contains 'varFirstContact2', the 'Type' is set to 'Object', and the 'Value' field is empty. On the right is a preview of a flow. The flow starts with a 'Customer Voice Response Add or Modified' trigger, followed by a join connector, then a variable box for 'varFirstContact2' (highlighted with a red rectangle), another join connector, and finally a 'List Activity Party' action.

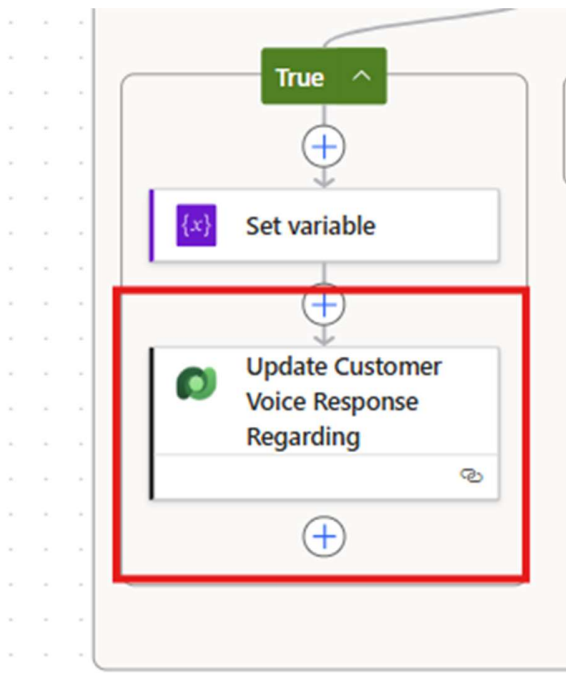
If the condition is true in that the Filter Array has PartyID Values this it sets the GUID in this variable



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