



Apttus-Dynamics 365 Integration

Summer 2020 Release Notes



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About Release Notes

Apttus Release Notes contain the following information about the Apttus-Dynamics 365 Integration Summer 2020 release:

- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release.
- [New Features](#): Feature Summary provides a high-level description of the new feature with reference to the topic to help you set up and use the new feature.
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features.
- [Known Issues](#): Lists known issues that are applicable in this release.


✔ For more information on new features, enhancements, and document improvements refer to [What's New](#) in the *Apttus-Dynamics 365 Integration Summer 2020 Administrator Guide*.

Packages

The following solutions and plugin DLLs are required to upgrade to this release to utilize all the new features of this release. These are the minimum required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

| Product | Latest Certified Version |
|---|--------------------------|
| AptusDynamicsIntegration Solution | 1.0.0.0 |
| AptusDynamicsDataExchange UI Solution | 1.0.0.6 |
| Plugin DLL: Aptus.Dynamics.DataExchange | 1.0.0.1 |

System Requirements and Supported Platforms

| System Requirements | |
|---------------------|--|
| Item | Requirement |
| CRM | Microsoft Dynamics 365 |
| Browser | <p>Apttus supports the following browsers:</p> <ul style="list-style-type: none">• Microsoft Edge• Google Chrome <p>Apttus recommends the latest stable version of the browser for the best performance.</p> <div style="border: 1px solid #ffc107; padding: 5px;"><p> Internet Explorer is not supported.</p></div> |

New Features

- [Understanding the Integration Flow](#)
- [Support for Single Sign-On \(SSO\)](#)
- [Apttus-Dynamics 365 Connector](#)


Introducing Apttus-Dynamics 365 Integration

Apttus is introducing the **Apttus-Dynamics 365 Integration** in the Summer 2020 release. The Apttus-Dynamics 365 Integration is designed to assist sales users with creating and managing Apttus quotes on the Microsoft Dynamics 365 platform. The integration utilizes the Apttus Digital Commerce SDK to provide Sales users on Dynamics 365 with the ability to create a quote, add and configure products, and finalize the quote and save the data back to Dynamics. Users can also check the status of quotes in any stage of the workflow from Dynamics 365.

The Apttus-Dynamics 365 Integration is intended to be used by sales users, partner sales, customer service representatives, and any other customers who want to manage Apttus quote functionality from their Dynamics environment.

Understanding the Integration Flow

Apttus supports the same quote creation flow provided by Apttus Digital Commerce on the Salesforce platform for sales users on Dynamics 365. You can create a quote associated with an account or opportunity, link the quote to a price list containing the product data, and add and configure products, bundles, and services with their associated attributes and options to the quote. All quote and product configuration data is saved to your Dynamics instance.

 For some advanced use cases, the quote creation process may require you to navigate to an external window to complete the flow. You Apttus contact will notify you if this is required for your implementation.

Support for Single Sign-On (SSO)

The Apttus-Dynamics integration supports single sign-on (SSO) from Dynamics. After you log into Dynamics 365 you can create quotes in Apttus without having to log in again.

Apttus-Dynamics 365 Connector

The Apttus-Dynamics 365 connector, introduced in the Spring 2020 release, **must be installed** and data must be synced between Dynamics and Apttus prior to creating quotes in Apttus. We recommend that a scheduled interval be set up in the connector to make sure your updated data is always available when creating Apttus quotes. For complete information on deploying and using the data sync connector, refer to the *Apttus-Dynamics 365 Connector Release Notes* and *Administrator Guide* for Spring 2020 on the Apttus Community Documentation Portal.

Enhancements

There are no enhancements in this release.

Known Issues

The following table provides the list of known issues in this release.

| Apttus Internal ID | Description |
|--------------------|--|
| DYN-300 | Logging out of Dynamics 365 does not log the user out of SFDC. |
| DYN-305 | Some fields in the quote edit screen and catalog are not being translated to the desired language. |
| DYN-317 | When a quantity is specified prior to adding a product to the cart, only 1 quantity is added to the cart. Workaround: Specify quantity on the cart after adding products. |

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For additional resources and support, please visit <https://community.conga.com>.

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