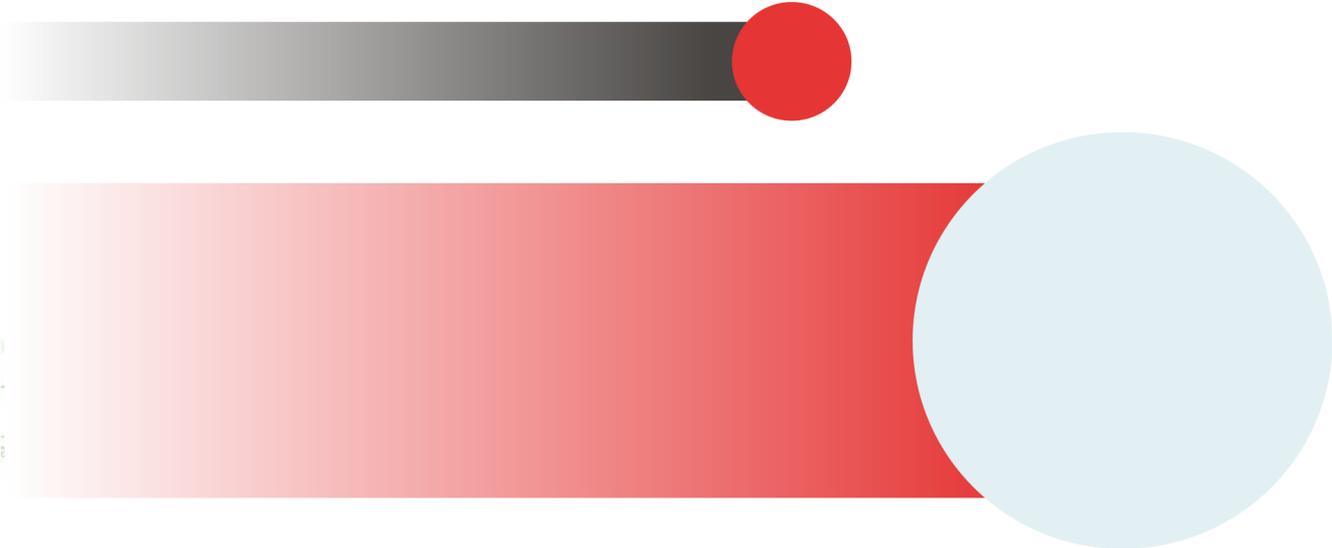




# Apttus-Dynamics 365 Integration

## Summer 2020 User Guide



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## About This Guide

The *Apttus-Dynamics 365 Integration User Guide* is designed to provide sales users with step-by-step instructions for creating and managing Apttus quotes and product configurations (carts) from Microsoft Dynamics 365. The Apttus-Dynamics 365 integration utilizes the Apttus CPQ quoting workflow and the Apttus Digital Commerce SDK to provide Dynamics users with the functionality to create and manage quotes.

Topic	Description
What's Covered	This guide walks sales users through the steps required to create and manage quotes and product configurations for Apttus CPQ in a Microsoft Dynamics 365 environment. It provides conceptual information and step-by-step instructions to guide you through the quoting process with minimal assistance.
Primary Audience	<ul style="list-style-type: none"> <li>• Dynamics 365 Sales Users</li> <li>• Customer Service Representatives</li> </ul>
IT Environment	Refer to the latest <i>Apttus-Dynamics 365 Integration Release Notes</i> for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this guide for each release, see the What's New topic.
Other Resources	<ul style="list-style-type: none"> <li>• <a href="#">CPQ on Salesforce Summer 2020 User Guide</a>: Refer to this guide for complete information on the Apttus Quote-to-Cash process and features.</li> <li>• <a href="#">Apttus-Dynamics 365 Connector Winter 2019 Administrator Guide</a>: Refer to this guide for step-by-step instructions for syncing data between Dynamics 365 and Apttus.</li> <li>• <a href="#">Apttus-Dynamics 365 Connector Winter 2019 Release Notes</a>: Refer to this document for the latest enhancements to the Apttus-Dynamics 365 Connector.</li> </ul>

This guide describes the following tasks:

- Creating an Apttus quote from an account or opportunity
- Adding standalone products and bundles to the quote
- Configuring products and bundles and their associated options and attributes
- Finalizing the quote

Before using Apttus Quotes you must be familiar with the following:

- Working knowledge of Microsoft Dynamics 365 platform
- Familiarity with the Microsoft Dynamics 365 Sales Hub
- Familiarity with Apttus CPQ concepts and functionality

 **Apttus Data in Dynamics**

An initial data load is required prior to using data to create Apttus Quotes. Refer to the *Apttus-Dynamics 365 Connector Administrator Guide* available on the Apttus Community Documentation Portal.

## What's New

The following table lists changes in the documentation to support each release.

Release	Topic	Description
Summer 2020	All topics.	First product release.

# About Apttus-Dynamics 365 Integration

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.

## Audience

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.

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

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

# Apttus-Dynamics 365 Connector

The Apttus-Dynamics 365 connector is a plug-in for Dynamics 365 that allows you to synchronize data between Dynamics 365 and Apttus on the Force.com platform. Apttus provides this connector to syncs master and transactional data in regular, scheduled intervals to ensure that the data you have in Dynamics matches the data in Apttus.

The Apttus-Dynamics 365 connector **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 more information on the connector, refer to the *Apttus-Dynamics 365 Connector Administrator guide* available from the Apttus Community Documentation Portal.

# Creating and Managing Quotes

A quote or a proposal is a formal statement of promise that lists the products and services to be sold to a customer at a defined price.

The Apttus-Dynamics 365 integration provides an embedded experience to allow sales representatives to take advantage of Apttus quoting functionality to create a quote and save the quote and configuration data back to Dynamics. You can create a quote from an account or opportunity, associate it with a price list, add products, bundles and services from the price list to the quote, configure those products, then finalize the quote for any required downstream processes.

The following topics provide a step-by-step process for creating the quote, adding and configuring products to the quote, and finalizing the quote in Dynamics 365.



 Note: The latest Chrome browser must be configured to allow third party cookies for the Dynamics 365 site before you can create or manage Apttus Quotes.

## Creating a Quote

You can create an Apttus quote in Dynamics in the following ways:

- Create the quote from an Account or Opportunity record in Dynamics 365. You must have at least one account or opportunity and one contact to create an Apttus quote.
- Create the quote from the Apttus Quotes page. You can specify an Account or Opportunity when you create the quote.

Whenever you create and save a quote record in Dynamics, the same quote record and its data is created in Apttus.

## To create an Apttus Quote from an account or opportunity

1. Log in to Microsoft Dynamics 365.
2. Go to **Sales Hub > Sales > Accounts / Opportunity**.
3. From the list, click on the **Account** or **Opportunity**. The Account or Opportunity *must* exist in Apttus.

- From the page header, click **Create Quote**. The Quote Summary page is displayed.
- Enter the following required fields in the quote header:

Field	Required?	Description
Account	Yes	The account associated with the quote (already present if creating the quote from an account).
Opportunity	No	The opportunity associated with the quote (already present if creating the quote from an opportunity).
Price List	Yes	Search and select the Price List to use for this quote. The price list determines the categories and products you see in the configuration.  <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>i</b> After you select a <b>Price List</b> for the quote, the product configuration and product list (catalog) sections become visible. You cannot save a quote unless you have chosen a Price List.</p> </div>
Primary Contact	Yes	The Primary Contact associated with this quote.

- Enter values into any additional fields.
- Continue to [add and configure products](#), or scroll to the bottom of the page and click **Submit** to save the quote as a draft.

## To create an Apttus Quote from the quotes list

- Log in to Microsoft Dynamics 365.
- Go to **Sales Hub > Sales > Apttus Quotes**. The list of quotes is displayed in a grid.
- From the page header, click **Create Quote**. The Quote Summary page is displayed.
- Enter the following required fields in the quote header:

Field	Required?	Description
Account	Yes	The account associated with the quote (already present in some cases).
Opportunity	No	The opportunity associated with the quote.

Field	Required?	Description
Price List	Yes	Search and select the Price List to use for this quote.  <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> After you select a <b>Price List</b> for the quote, the product configuration and product list (catalog) sections become visible. You cannot save a quote unless you have chosen a Price List. Note: You <b>cannot</b> change the price list for a quote after it is created.</p> </div>
Primary Contact	Yes	The Primary Contact associated with this quote.

5. Enter values into any additional fields.
6. Continue to [add and configure products](#) or scroll to the bottom of the page and click **Submit** to save the quote as a draft.

## Adding Products

After you have created the initial quote details, you can add products and bundles to the shopping cart from the product list (catalog) and configure product quantity, options, and attributes. Products are added to the cart as line items and are stored as a product configuration on the quote record.

**Standalone** and **Bundle** products with options or attributes are considered configurable. You can identify a configurable product or bundle with the configure (  ) icon.

 The (  ) icon indicates an "installed product," meaning it refers to a product that has been previously purchased.

## To add a standalone product to the quote

Perform the following steps to add one or more products to the quote.

1. From the Quote Summary, click **Product List**.

2. Search for the product you want to add to the quote using one of the following two methods:
  - Search by Related Category: Use the left sidebar to browse through product categories. Click a category link to view the list of product associated with that category.
  - Search by Product Family: From the left sidebar under Product Family, click the drop-down and select a Product Family from the list. The product list refreshes to display products from the selected family. You can select more than one family to expand your search. To remove a product family from the product results, click the 'x' next to the family name in the Product Family field.

 You can sort the product list by **Name** or **Relevance**. Use the toggle next to the sorting options to switch between a list and grid view.

3. Enter a **Quantity** for the product you want to add.
4. Click **Add to Cart** to add the product to the shopping cart. If the product is configurable, you must [configure the product](#) before it can be added to the cart.

 If any product constraints are associated with the product, they are displayed in a pop-up when you hover your cursor over the **Add to Cart** button.

When a product is successfully added to the quote a message is displayed and the product is added as a line item in the shopping cart at the bottom of the page. The cart (  ) icon in the top right corner of the page displays the number of products currently in the cart. You can click the icon to view a summary of the quote line items and modify the quantity or delete products from the cart.

5. Add more products or go to the shopping cart to [finalize the quote](#).

## To add a bundle product to the quote

Perform the following steps to add one or more products to the quote.

1. From the Quote Summary, click **Product List**.
2. Search for the product you want to add to the quote using one of the following two methods:
  - Search by Related Category: Use the left sidebar to browse through product categories. Click a category link to view the list of product associated with that category.
  - Search by Product Family: From the left sidebar under Product Family, click the drop-down and select a Product Family from the list. The product list refreshes to display products from the selected family. You can select more than one

family to expand your search. To remove a product family from the product results, click the 'x' next to the family name in the Product Family field.

3. Enter a **Quantity** for the product you want to add.
4. Click **Add to Cart**. The Product Configuration window is displayed.
5. Select the bundle options you want to include for the bundle product and quantities for each.
6. When you are finished, click **Add to Cart**. The bundle is added to the cart. The cart automatically reprices bundle products based on the options you selected.
7. Add and configure more bundles or go to the shopping cart to [finalize the quote](#).

## Configuring Products

Products and bundles with the configure icon (  ) are configurable and have associated product attributes or options that must be specified before the product can be added to the quote. You can configure products at the same time you add them to the quote. Product attributes are used to associate certain features to a product. Examples of common attributes are color, size, and weight. Product options are a product type that is associated with a product bundle. Examples of common product options are additional features, products, or services.

### To configure a product

1. Click **Product List** to view the list of products that can be added to the quote.
2. Identify the product you want to configure, and click **Add to Cart**. The Product Configuration window is displayed.
3. Select attributes or options to configure the product. Specify the quantity for any options you choose to configure.
4. When you are finished configuring the product, click **Add to Cart**. The product is added to the shopping cart at the bottom of the quote page.

## Finalizing a Quote

After you have finished adding products and bundles to the cart, you can finalize the quote by reviewing the cart and making changes. You can then submit the quote and save it as a record in Dynamics 365.

Finalize the quote by adjusting product quantities, start or end dates (for subscription-based products), or modify attributes and options for products and bundle products.

## To finalize a quote

1. From the Quote Summary, click **Edit Line Items**. The page scrolls to display the shopping cart, which contains all of the products you have added to the quote.
2. To adjust the quantity of a product on the cart, click inside the **Quantity** field to change the value. When you change the quantity of a product on the cart, the Price Summary is automatically updated to indicate the change in price.
3. To change the end date or start date of a subscription product, click the **Start Date** or **End Date** fields to open a date picker and change the date.
4. To modify options or attributes for a product or bundle:
  - a. Click the configure icon (  ) next to the product name on the cart. The Product Configuration window is displayed.
  - b. Add or remove options or change attributes. The net price displayed at the top of the page is automatically updated.
  - c. Click **Update Configuration**. The Product Configuration window closes automatically and the shopping cart is updated. The Price Summary is automatically updated to indicate the change in price.
5. When you have completed any final adjustments or changes, go to the Price Summary and click **Submit**. A window is displayed with the quote number and a confirmation that the quote has been saved to Dynamics 365.
6. Click **Review Your Quote** to close the window and display the Apttus Quotes list page.

### **What's Next?**

Depending on your business needs, you can now take further action on the quote you created:

- [Manage the quote record in Dynamics 365](#), adding new products or making changes to existing products or line items.
- If you are using Apttus CPQ on Salesforce, you can generate a proposal from the quote, request and assign approvals, and enable certain downstream processes such as order or asset management.
- If you are using Apttus Digital or Partner Commerce, you can use the quote to generate orders for your customers.
- Use the quote record and product configurations for your own custom implementations.

## Managing Existing Quotes

Quotes you have created or have access to are displayed on the **Apttus Quotes** page in Dynamics. To view the page go to **Sales Hub > Sales > Apttus Quotes**. The list of quotes is displayed in the page sorted by Created Date.

Quote Id	Account	Opportunity	Approval Stage	Valid Until Date	Grand Total	Created By ID	Created Date
Q-00001337	ABC Corporation		Draft		\$2,175.00	global admin	6/11/20, 4:23 PM
Q-00001336	ABC Corporation		Draft		\$990.00	global admin	6/11/20, 3:43 AM
Q-00001335	Acc-11Jun		Draft		\$10.00	global admin	6/11/20, 3:18 AM
Q-00001334	ABC Corporation		Draft		\$0.00	global admin	6/10/20, 4:44 PM
Q-00001333	ABC Corporation		Draft		\$35.00	global admin	6/10/20, 4:05 AM
Q-00001332	ABC Corporation		Draft		\$70.00	global admin	6/10/20, 4:04 AM
Q-00001197	ABC Corporation		Draft		\$0.00	global admin	6/8/20, 6:33 AM
Q-00001196	ABC Corporation		Draft		\$1,210.00	global admin	6/8/20, 6:31 AM
Q-00001195	ABC Corporation		Draft		\$1,260.00	global admin	6/8/20, 6:20 AM
Q-00001194	acc-02		Draft		\$50.00	global admin	6/8/20, 6:00 AM

You can take the following actions from the Apttus Quotes page:

- Click the **Create Quote** button to begin the process of creating a new quote.
- Use the type-ahead search field at the top of the page to search for a specific quote or quotes that match one or more specific keywords.
- Click a column header to sort the quote list by the column's field.
- Use the pagination controls at the top right to move between pages or change the number of records shown per page.
- Click the checkbox in the header to select all quote records.
- Click the checkbox next to a quote and click the Delete icon (  ) to delete the quote OR click the kebab menu to the left of the Quote Id and select **Delete**.
- Click the link corresponding to a Quote Id to edit the quote.

## Editing a Quote

After you have created a quote, you can return to the **Apttus Quotes** page to make changes to the quote header or quote line items.

 You can only make changes to quote line items when the quote is in "Draft" or "Presented" status.

- [To edit the quote summary](#)
- [To edit quote line items](#)

## To edit the quote summary

1. From the Apttus Quotes page, click the link corresponding to the **Quote Id**. The Quote Summary page is displayed.
2. Click the edit icon (  ) next to a field in the Quote Summary to edit the value.

 You **cannot** change the price list for a quote after the quote has been created.

3. Enter or select a new value for the field and click **Update**.

 It is not recommended to make changes to the quote **Approval Stage** or **Approval Status** manually.

## To edit quote line items

Perform the following steps to edit the product configuration for a quote.

1. From the Apttus Quotes page, click the link corresponding to the **Quote Id**. The Quote Summary page is displayed.
2. Click the **Line Items** tab.
3. Next to Line Items, click **Edit** (this button is not shown if the quote is in any other status than "Draft" or "Presented"). The shopping cart refreshes to show editable fields and the Product List is displayed below the cart.
4. To add more products or bundles to the quote, click **Product List** and follow the steps in [Adding Products](#).
5. To configure a product or bundle on the quote, click the configure icon (  ) to open the Product Configuration window. Make changes as needed and click **Update Configuration**.
6. To add a configurable product to the quote, click **Product List** and follow the steps in [Configuring Products](#).
7. When you are finished editing quote line items, go to the Price Summary on the cart and click **Submit**. The quote is saved and a window is displayed with the quote number.
8. Click **Review My Quote** to return to the Apttus Quotes page.

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