# Tacton Connector for MS Dynamics User Quick Start Guide

Tacton CPQ® enables the users to create professional and accurate proposals, directly from MS Dynamics. The proposal contains the price together with the documentation describing the content of the goods. The proposal typically contains a cover letter, a Bill of Materials (BOM) and a warranty and guarantee section. A proposal can, in some countries, be a legally binding contract.  The producer of the proposal must ensure the quality of the proposal.  Tacton Connector for MS Dynamics helps the user to create a correct, meaningful and consistent proposal document.

## Step-by-step guide

**How to create a Solution in MS Dynamics and sync the record information (and associated data) into Tacton TCPQ.**

1. Log in to MS Dynamics
2. Create a new or use existing Account
3. Create a new or use existing Opportunity, select an Account for the Opportunity
4. Change the application to Tacton CPQ.
5. Create a new or use existing Solution, select an Opportunity for the Solution
6. On the Tacton Solution click “Open in Tacton” and a new Tacton TCPQ browser tab will automatically open.

Note: *If you are presented with a screen that says “Data Transfer in Progress” you may be presented with a MS Dynamics login screen and/or a Tacton TCPQ login screen, login to both with your corresponding credentials.*

The Account, Opportunity and Solution you created in MS Dynamics is now replicated to Tacton CPQ and you will see a screen displaying the transfer results. Click “Ok” and you are now on the Solution record in the Tacton TCPQ

Additionally, if you make any changes to the Account, Opportunity or Solution (or Solution Line Item) in MS Dynamics, then click “Open in Tacton” again, the updated information will be sent to Tacton TCPQ.

**How to create Solution in Tacton TCPQ and sync the record information (and associated data) into MS Dynamics. (**

1. Log in to Tacton TCPQ
2. Create a new or use existing Account
3. Create a new or use existing Opportunity, select an Account for the Opportunity
4. Create a new or use existing Solution, select an Opportunity for the Solution
5. On the Solution click “Sync to MS Dynamics” and a new MS Dynamics browser tab will automatically open.

Note: *If you are presented with a screen that says “Data Transfer in Progress” you may be presented with a MS Dynamics login screen and/or a Tacton TCPQ login screen, login to both with your corresponding credentials.*

At this point you will be on the Solution page in MS Dynamics.

The Account, Opportunity and Solution you created in Tacton TCPQ is now replicated to MS Dynamics and you will see a screen displaying the transfer results. Click “Ok” and you are now on the Solution record in the MS Dynamics application.

Additionally, if you make any changes to the Account, Opportunity or Solution (or Solution Line Item) in Tacton TCPQ, then click “Sync to MS Dynamics” on the Solution, the updated information will be sent to MS Dynamics.