Dynamics 365 Integration

Configure One brings powerful product configurations, quoting, and ordering to Microsoft Dynamics 365 for Sales. This integration ties our quoting interface directly into Dynamics opportunities and uses customer data from Dynamics to automatically populate quotes in Configure One.

Complete CPQ Solution

Configure One's entire configure-price-quote workflow can be accessed from Dynamics 365. Configure fully priced products and create Configure One quotes from an opportunity in Dynamics.
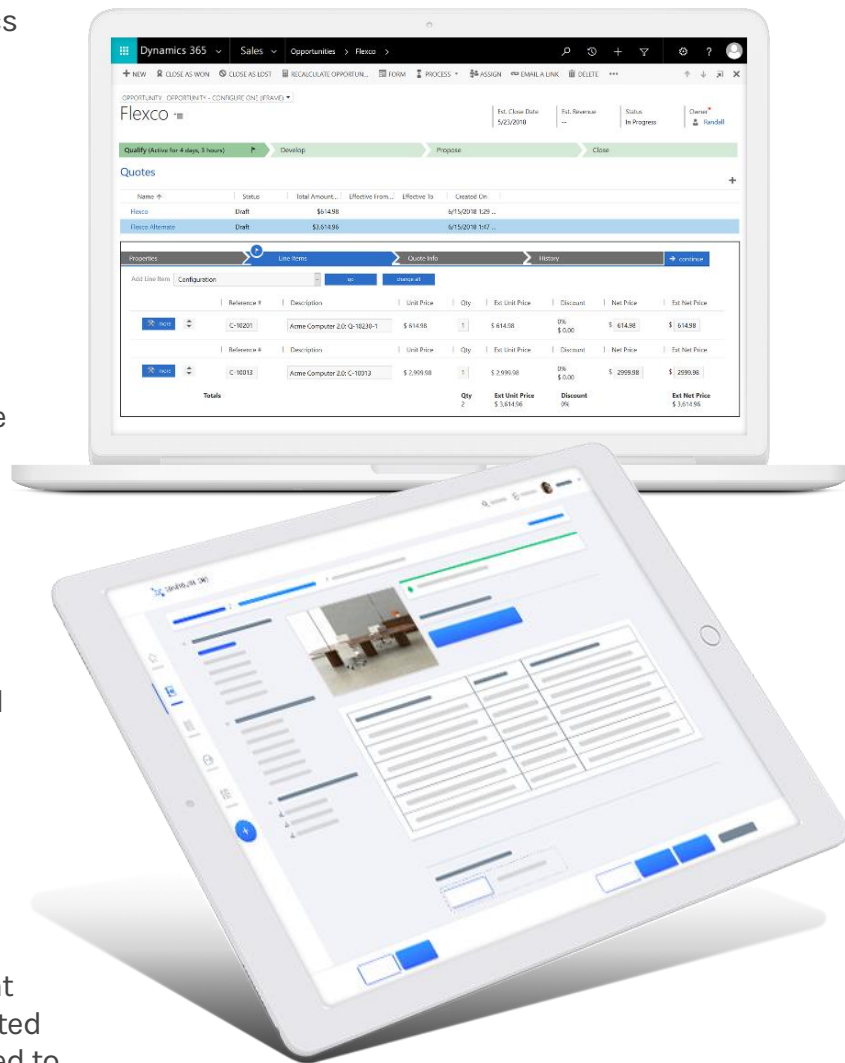
Seamless Quoting

Create quotes using Configure One's expansive quoting and pricing features to generate proposal documents. Any data entered for a quote in Configure One synchronizes to update the opportunity in Dynamics.

Product Configuration

Configured products are sent from Configure One to Dynamics and included on the opportunity. Any unique items created for the configuration are also sent to Dynamics for future use.

Customer Dataflows

No need for dual-entry; customer account and contact data is automatically imported to Configure One from Dynamics and used to populate quotes.

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Integrated Workflow

Users can access the Configure One quoting interface directly within the Opportunity form in Dynamics 365 for Sales. When they create a new quote, customer account and contact information from the Dynamics opportunity are imported to the quote in Configure One.

From the Configure One quoting interface, users can create new product configurations and add line items to the quote. After all of the line items are added, Configure One can generate a new quote proposal document.

Quote documents and line items from the Configure One quote are passed to the opportunity in Dynamics. Any new product configurations are saved as products in Dynamics and added to the opportunity. If the same product configuration has been used before, the existing product from Dynamics is added to the opportunity.

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Compatibility

Configure One's integration is supported with the following versions of Microsoft Dynamics:

- Dynamics 2016 on-premise (with ADFS or Azure for authentication)
- Dynamics 365 (with Azure for authentication)

Configure One is a leading provider of web-based product configurator and CPQ (configure, price, quote) software. Configure One enable companies both large and small to increase revenues and decrease costs by automating the way they sell and process orders for configurable, multi-option, and customizable products.

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