Integrating Dynamics 365 for Sales with Proposal Manager

Version 1.0

Contents

[Overview 1](#_Toc528158928)

[Excel add-in 1](#_Toc528158929)

[Word add-in 1](#_Toc528158930)

## Overview

## If your business uses Dynamics 365 for Sales to track sales opportunities, you can integrate it to Proposal Manager to extend the opportunity management experience. When you integrate both products, you can start tracking the opportunity in Dynamics by creating it in your organization, and then manage the proposal creation of that opportunity from Proposal Manager. This gives you a unified experience in which you can do more with the same opportunity.

## The integration is so seamless that you can assign the Deal Type, choose team members and their roles, and even add documents to the opportunity, including the formal proposal template, all from Dynamics 365.

## If you are an intense user of Dynamics customizations, you can even choose how to map the attributes of the opportunities that you have in Dynamics, to the fields available in Proposal Manager. The same is true for the opportunity status mapping between the two systems, which is 100% customizable.

## Starting with wave 3 of Proposal Manager, the integration engine is included in the code base, so you can configure your own integrations without the need to download any other repos.

## If you are a user of both products, integrating them will make opportunity and proposal management easier for you and your organization.

If you want to see how this products work combined, take a look at the PowerPoint presentation delivered with this very repo.