

Welcome to Tacton Summit 2024

Agenda

09:30-09:45 **Opening** Jeff Summers, CCO Tacton

09:45-10:45 **Tacton CPQ Product Vision**, Jesper Alfredsson CPO
Tacton

10:45-11:15 Coffee break and mingle

11:15-11:45 **A Journey Into Tacton's Latest Innovations**, Anders
Forsberg

11.45-12.15 **Tacton Integrations**, Mathias Roitto

12:15-13.45 Lunch and networking

13:45-14:15 **Guided Selling**, Johan Jacobsson

14:15-14:45 **Omnichannel Sales**, Per Rohdin

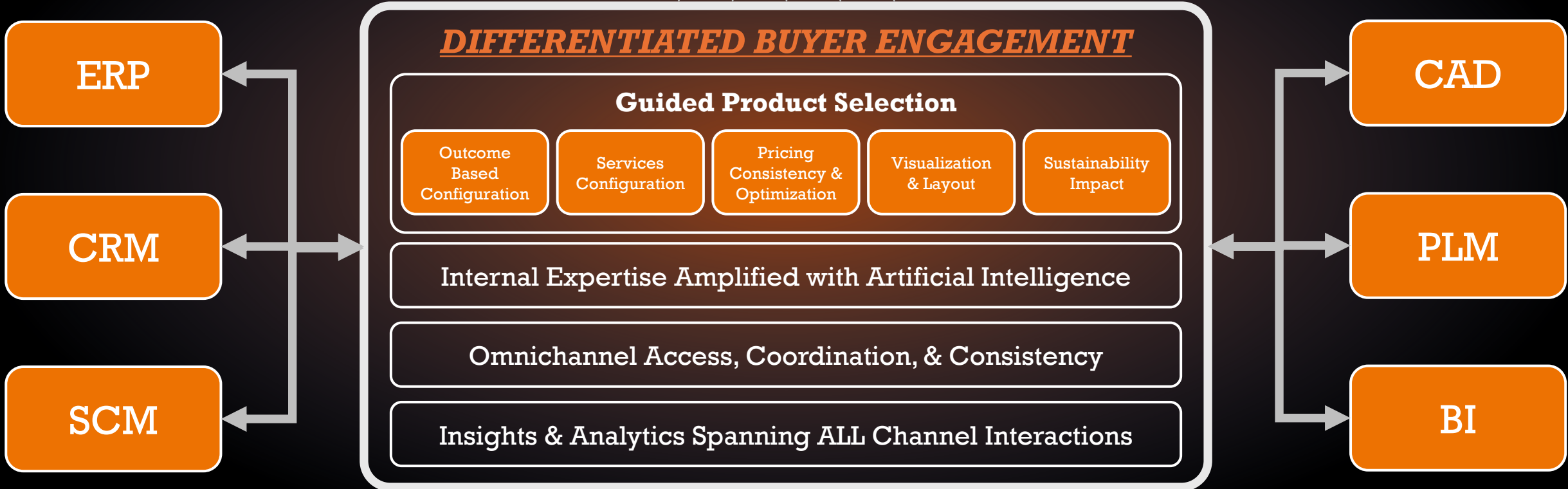
14:45-15:00 **Sum up and Closing**, Jeff Summers CCO Tacton

Tacton CPQ Product Vision

Jesper Alfredsson, CPO Tacton



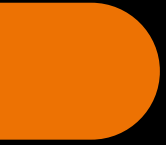
***THE BUYER-CENTRIC
SMART FACTORY***



Product Launches



Service Sales



**1. Installed Base
(via API)**

2. Configured Service

3. Category Pricing

2.1 Asset Scope and Roles

2.2 Service Products

- Preventive Maintenance
- Corrective Maintenance
 - Consumables
 - Catalog products
 - Trainings

2.3 Services Scheduling

Service Sales

Tacton CPQ Accounts Opportunities Solutions Approvals Administration Global Sales

Account: Acme Inc > Opportunity: New Service Contract > Solution: All Assets > Configured Service: SERV-018

Configured Service
SERV-018

OVERVIEW SCOPE OF SUPPLY SERVICE TASKS SERVICE RESULT SERVICE PRICING SERVICE DOCUMENTS

Service BoM

Pages

- Labor
- Summary
- General Products
- Acme-B1 Line 1
 - Preventive Maintenance
 - Corrective Maintenance
 - Equipment Move
 - Hot Melt Adhesives
 - Films
- Acme-B1 Line 2

Preventive Maintenance

Date	Event	Visits
2024-03-31	Pre-inspection Event	1
2024-04-14	PROD-TOTAL-15000	1
2024-05-20	Pre-inspection Event	1
2024-06-03	PROD-TOTAL-16000	1
2024-07-10	Pre-inspection Event	1
2024-07-24	PROD-TOTAL-17000	1
2024-09-30	Pre-inspection Event	1

Tacton CPQ Accounts Opportunities Solutions Approvals Administration Global Sales

Account: Acme Inc > Opportunity: New Service Contract > Solution: All Assets > Configured Service: SERV-018

Configured Service
SERV-018

OVERVIEW SCOPE OF SUPPLY SERVICE TASKS SERVICE RESULT SERVICE PRICING SERVICE DOCUMENTS

Service Pricing

Price Element	Parts	Unique	Commercial	Maintenance	Consumables	Expert Services	Training	Total
Price 2024	€14,519.77	€3,008.22	€11,511.55	\$250,104.59	€58,515.48	\$16,599.45	€6,570.91	3,045,681.67kr
Price 2025	€4,106.23	€951.78	€3,154.45	\$55,597.38	€19,150.52	\$5,432.55	\$2,150.48	770,286.24kr
Cost 2024	€9,502.01	€2,457.53	€7,044.48	\$331,275.40	€34,512.12	\$15,403.01	\$9,945.51	3,442,154.05kr
Cost 2025	€2,833.99	€782.47	€2,051.52	\$84,844.60	€11,294.88	\$5,040.99	\$3,254.89	926,333.57kr
Price	€18,626.00	€3,960.00	€14,666.00	\$305,701.96	€77,666.00	\$22,032.00	\$8,721.39	3,815,967.91kr
Cost	€12,336.00	€3,240.00	€9,096.00	\$416,120.00	€45,807.00	\$20,444.00	\$13,200.40	4,368,487.62kr
Margin	33.77%	18.18%	37.98%	-36.12%	41.02%	7.21%	-51.36%	-14.48%

Tacton CPQ Accounts Opportunities Solutions Approvals Administration Global Sales

Account: Acme Inc > Opportunity: New Service Contract > Solution: All Assets

Solution
All Assets

OVERVIEW PRICING 3 815 967 91kr PROPOSAL APPROVALS 0 & 0

Service Pricing Edit Pricing

Price Element	Parts	Unique	Commercial	Maintenance	Consumables	Expert Services	Training	Total
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Margin	33.77%	18.18%	37.98%	-36.12%	41.02%	7.21%	-51.36%	-14.48%
Index 2024	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Index 2025	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Premium	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Contingency Pot	€0.00	€0.00	€0.00	\$0.00	€0.00	\$0.00	€0.00	\$0.00
Net Price Adjusted	€18,626.00	€3,960.00	€14,666.00	\$305,701.96	€77,666.00	\$22,032.00	\$8,721.39	3,815,967.91kr
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Margin	33.77%	18.18%	37.98%	-36.12%	41.02%	7.21%	-51.36%	-14.48%
Discount	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Final Price	€18,626.00	€3,960.00	€14,666.00	\$305,701.96	€77,666.00	\$22,032.00	\$8,721.39	3,815,967.91kr
Final Cost	€12,336.00	€3,240.00	€9,096.00	\$416,120.00	€45,807.00	\$20,444.00	\$13,200.40	4,368,487.62kr
Final Margin	33.77%	18.18%	37.98%	-36.12%	41.02%	7.21%	-51.36%	-14.48%

Integration Trampolines

Print Category Pricing

Currency Selections

Object Currency (Total) Swedish krona

Material Currency Euro

Labor Currency United States Dollar

Print Currency United States Dollar

Documents

TS-0014 - Parker Machines

TS-0014 - Solution Test

Download as zip

Forecast Aggregations

Pricing Outputs and Cals

Test Fields

Info about this page ID: TS-0014 Show History Organization: Global Sales

Organization: Global Sales
Owners: Mark Hughes (Sales Admin)



Self-Service Channels



TruckCo.

Home

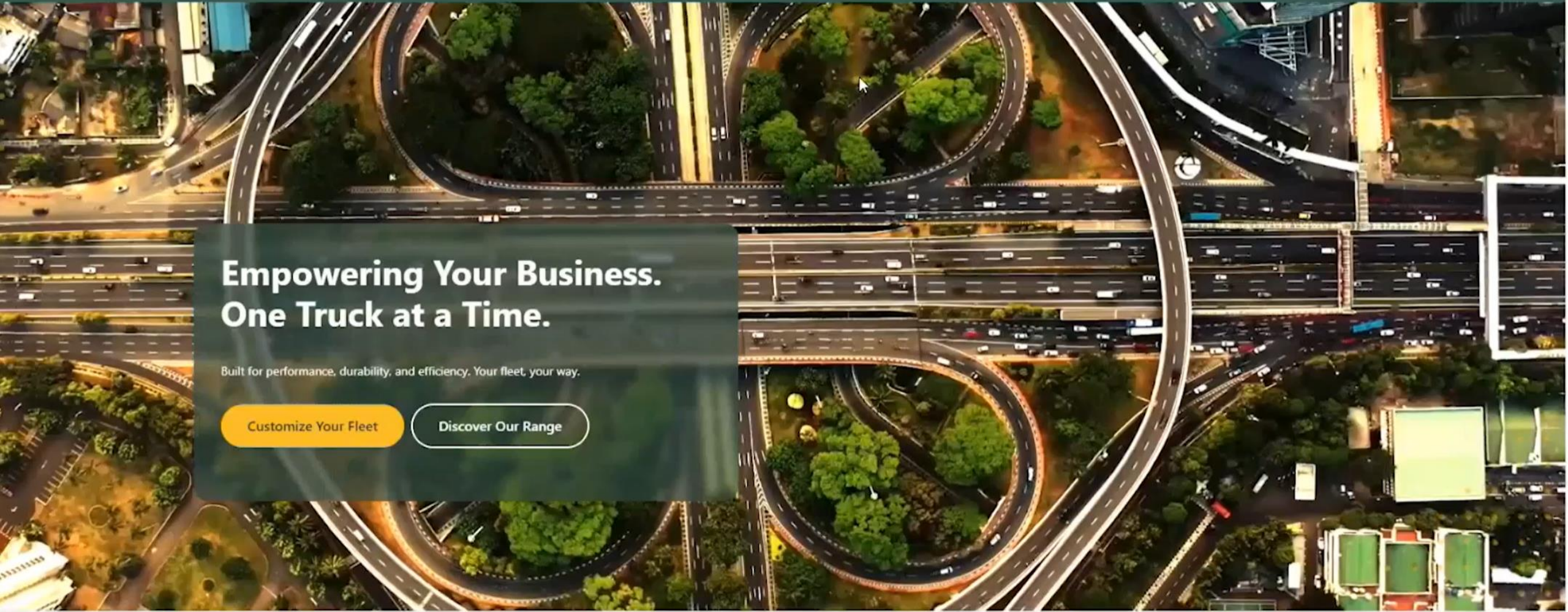
About TruckCo

Products

Sustainability

Career

Newsroom



Empowering Your Business. One Truck at a Time.

Built for performance, durability, and efficiency. Your fleet, your way.

Customize Your Fleet

Discover Our Range



Model S

Navigation goes here


Visualization goes here

Configuration panel

UI COMPONENTS
SHOULD GO HERE




```
2 <html lang="en">
21 <body class="config">
52
53 <!-- ADD Configuration Panels -->
54 <div class="config">
55 <div class="row">
56 <div class="col-md-12">
57 <h2>Model S</h2>
58 </div>
59 </div>
60 <div class="row config-row">
61 <div class="col-md-7">
62 Navigation goes here
63 </div>
64 <div class="col-md-5 config-main">
65 Visualization goes here
66 <div class="config-panel">
67 <tacton-configuration-panel product_name="truck"></tacton-configuration-panel>
68 </div>
69 </div>
70 </div>
71 </div>
72 <!-- End Configuration -->
73
74 <script src="js/bootstrap.bundle.js"></script>
75 <script src="js/tiny-slider.js"></script>
76 <script src="js/custom.js"></script>
```

 `<tacton-configuration-panel product_name="truck"></tacton-configuration-panel>`

ADDING CODE SNIPPETS




Model S


Navigation goes here

Visualization goes here

OPERATIONS

Vehicle type


Tractor



Truck (single-unit)

Application

 Volume restricted goods

ENVIRONMENT


Traffic conditions


No traffic


Easy traffic


Heavy traffic

Topography







Model S

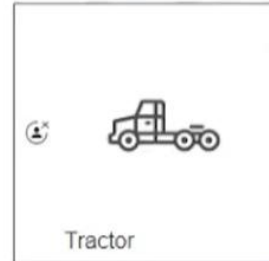


Start Side Interior Top

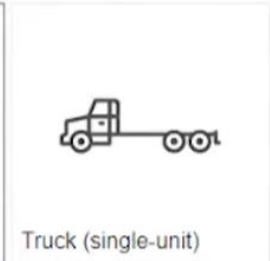
Customer needs **Chassis** Body Fuel Tanks Powertrain Cab Auxiliary items Services

OPERATIONS

Vehicle type



Tractor



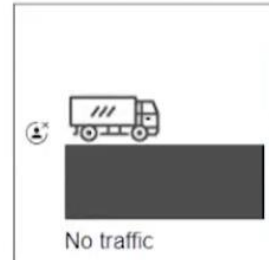
Truck (single-unit)

Application

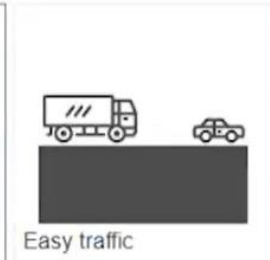
Volume restricted goods

ENVIRONMENT

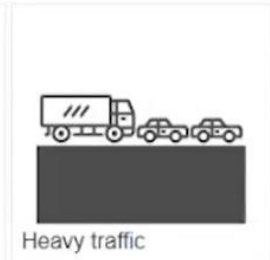
Traffic conditions



No traffic



Easy traffic



Heavy traffic

Topography



New Technology

Expertise Amplified with AI

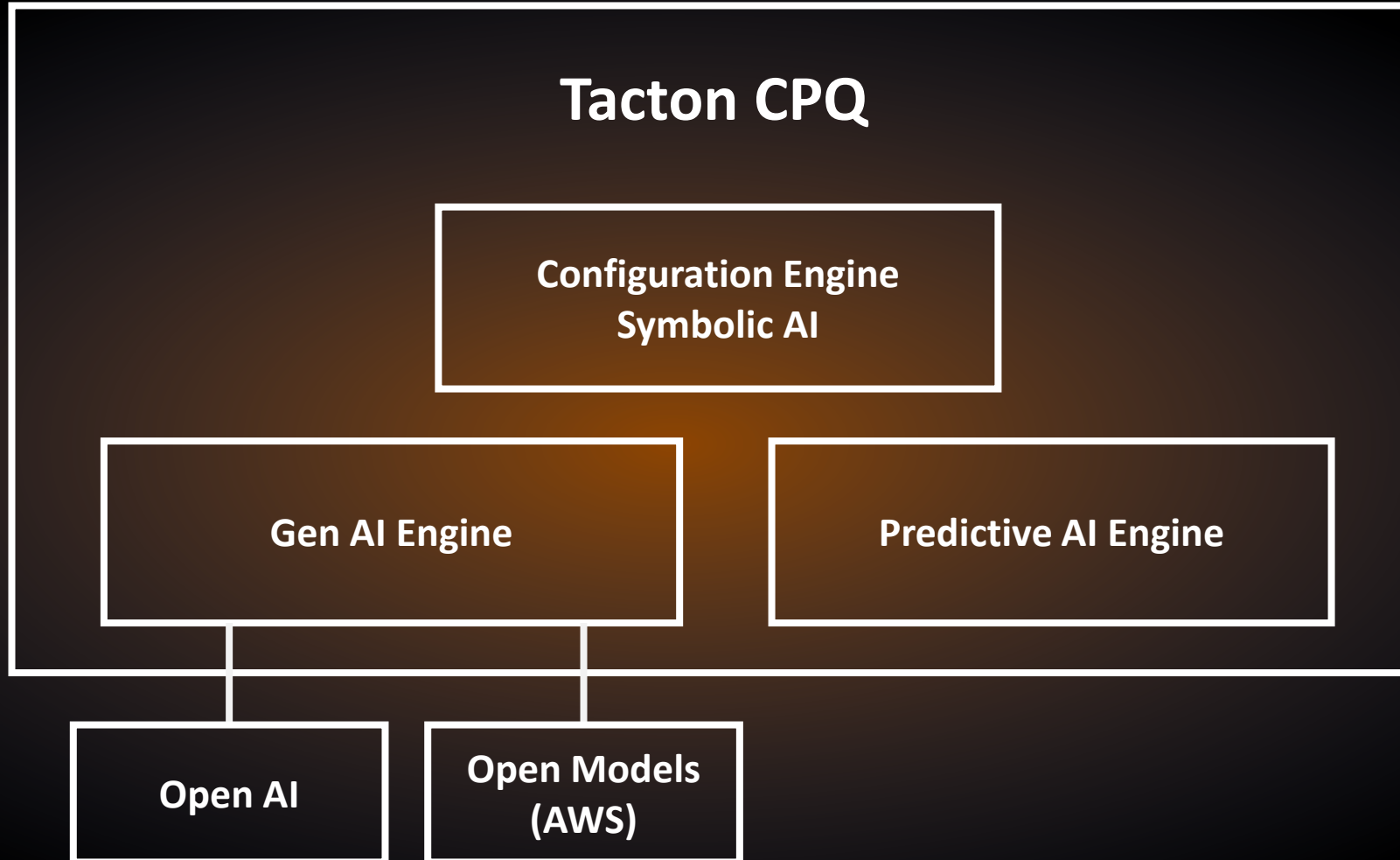


Predefined
Symbolic

Predictive
Machine Learning

Preemptive
Generative

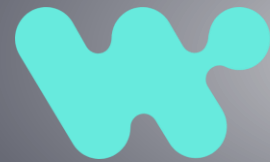
New AI Engines



New Integration Platform



powered by

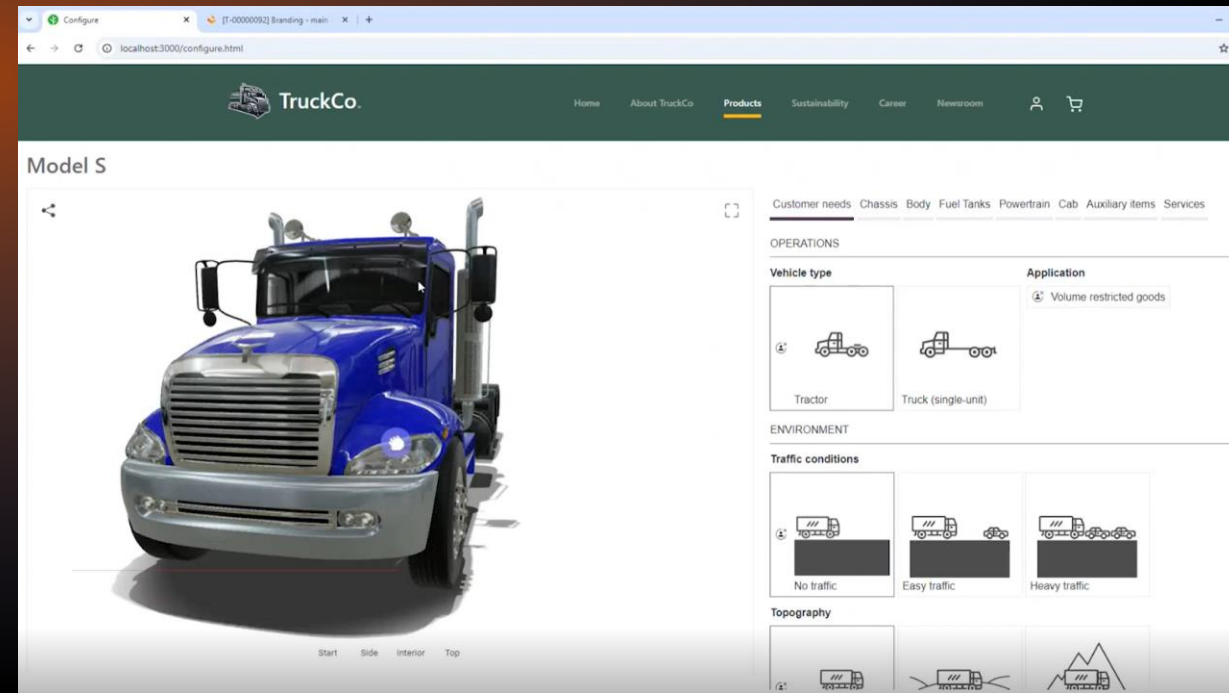


workato

Coffee break until 11:15

Self Service Channels

- A new option for Tacton CPQ
- An easy, and fast way to tailor user experience for specific channels with the on the Tacton CPQ
- Future proof for coming Tacton CPQ features
- Available from today



A Journey Into Tacton's Latest Innovations

Anders Forsberg, Product Manager Tacton

Tacton has a long history of innovation

Gartner Magic Quadrant for CPQ 2023:

- Innovation: Tacton CPQ is the most innovative product evaluated for this Magic Quadrant.

1998

2017

2018

2019

2020

2021

2022

2023

2024

Tacton
CPQ SaaS

Pricing

Visualization

Product
modeling

CAD
Automation

Integrations

Analytics

Subscription
pricing

Salesforce
Integration

Data Import
Automation

Enhanced
permissions in
Tacton Admin

Product
Validations

System
Configuration

Environmental
Footprint
Configuration

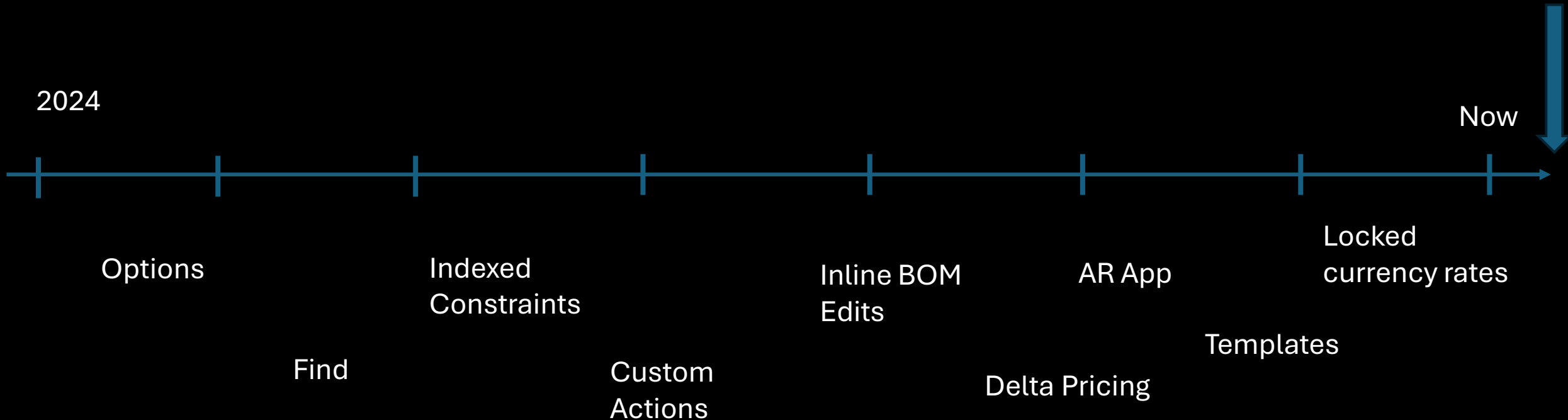
Layout
Planning



Tacton has a long history of innovation

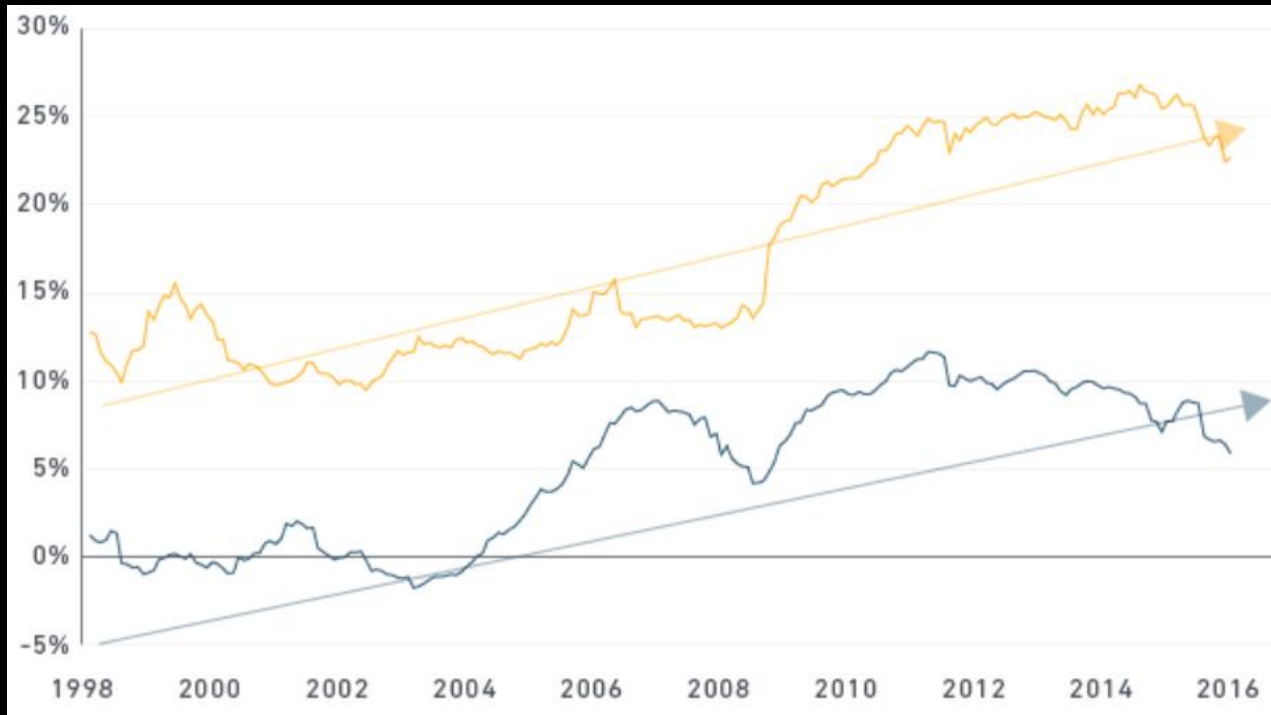
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Locked Currency Rates

Long deal cycles will expose you to currency exchange rate risk



Locked Currency Rates

Lock rates and hedge currency exchange rate risk

Lock Currency Rate

Currencies

Select currencies...

- DKK
- EUR
- GBP
- NOK
- SEK
- USD

Ok Select All Visible

▼ Currency Rates 7

The currency for the Solution is EUR. All rates are shown relative to the Solution's currency rate.

<input type="checkbox"/>	Currency	Solution Specific Rate	Global Rate	Modified By	Modified Date	
<input type="checkbox"/>	BSD	2.47	2.40	Mark Hughes (Sales Admin)	2024-02-27 10:45	
<input type="checkbox"/>	GBP	0.87	0.90	Mark Hughes (Sales Admin)	2024-02-27 10:45	
<input type="checkbox"/>	CAD	1.56	1.45	Mark Hughes (Sales Admin)	2024-02-27 10:45	
<input type="checkbox"/>	DKK	7.45	7.00	Mark Hughes (Sales Admin)	2024-02-27 10:45	
<input type="checkbox"/>	GTQ	9.02	9.50	Mark Hughes (Sales Admin)	2024-02-27 10:45	
<input type="checkbox"/>	ISK	<input type="text" value="120.00"/>	120.00	Mark Hughes (Sales Admin)	2024-02-27 10:45	
<input type="checkbox"/>	LYD	1.55	1.55	Mark Hughes (Sales Admin)	2024-02-27 10:45	

Templates

Customized/personalized starting point for the configuration

Ideal when selling to special customers with special needs

You can even prepare templates and share with others in the organization.

The screenshot displays a user interface for managing templates. At the top, there is a navigation bar with a back arrow and the text 'All templates', and a 'Close x' button on the right. Below this, the main title is 'Vanilla Bike with a Hierarchical BoM'. There are two interactive elements: a 'Sort by' dropdown menu with an up/down arrow icon, and a 'Filtered by Product' button with a filter icon. The main content area shows a list of templates. The first template is 'My template' with the description 'Template with special request, ETO component and MVC items.' The second template is 'My very first template' with the description 'This contains ground cool bike model of medium size with front brakes. Brakes are of type discs.' Below the list, there is a 'Showing' label and a preview window. The preview window shows a smaller version of the 'My template' card, including its title, description, and a trash icon. At the bottom right, there is a pagination control with left and right arrows and the number '1' in a blue box.

Templates


Product Catalog



Configurable Products

Catalog Items

Templates

Image	Product Id	Description
	Elevator solution	With our i energy-eff easy-to-co elevator s you reduc footprint a operation: and increa value of y property.

Showing 1 to 1 of 1 rows

← All templates

Close x

Vanilla Bike with a Hierarchical BoM

Sort by

Filtered by Product

My template

Template with special request, ETO component and MVC items.

My very first template

This contains ground cool bike model of medium size with front brakes. Brakes are of type discs.

test

← Back

Close x

My template

Vanilla Bike with a Hierarchical BoM

Template with special request, ETO component and MVC items.

Showing

< 1 >

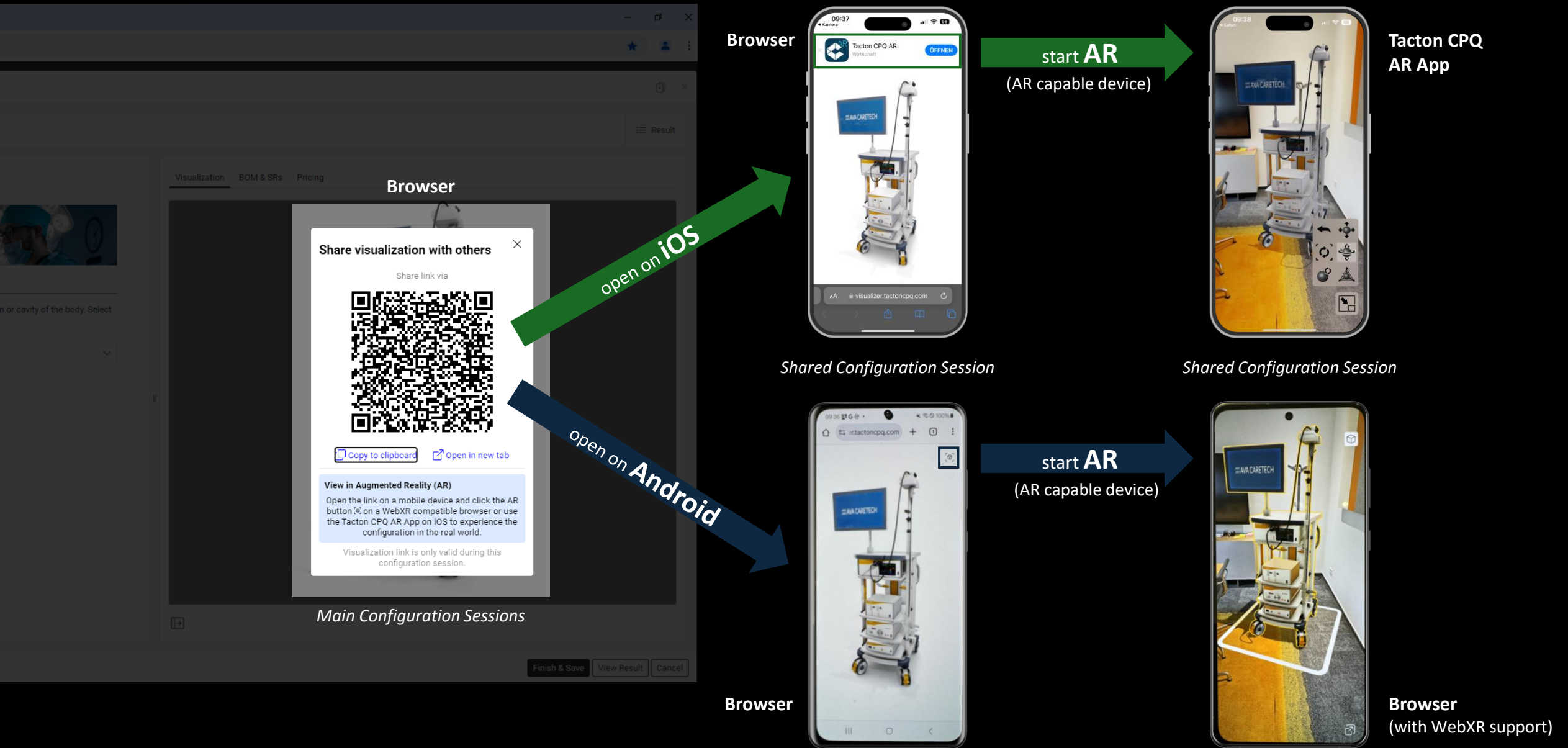
< 1 >

Close

3D Viz and AR

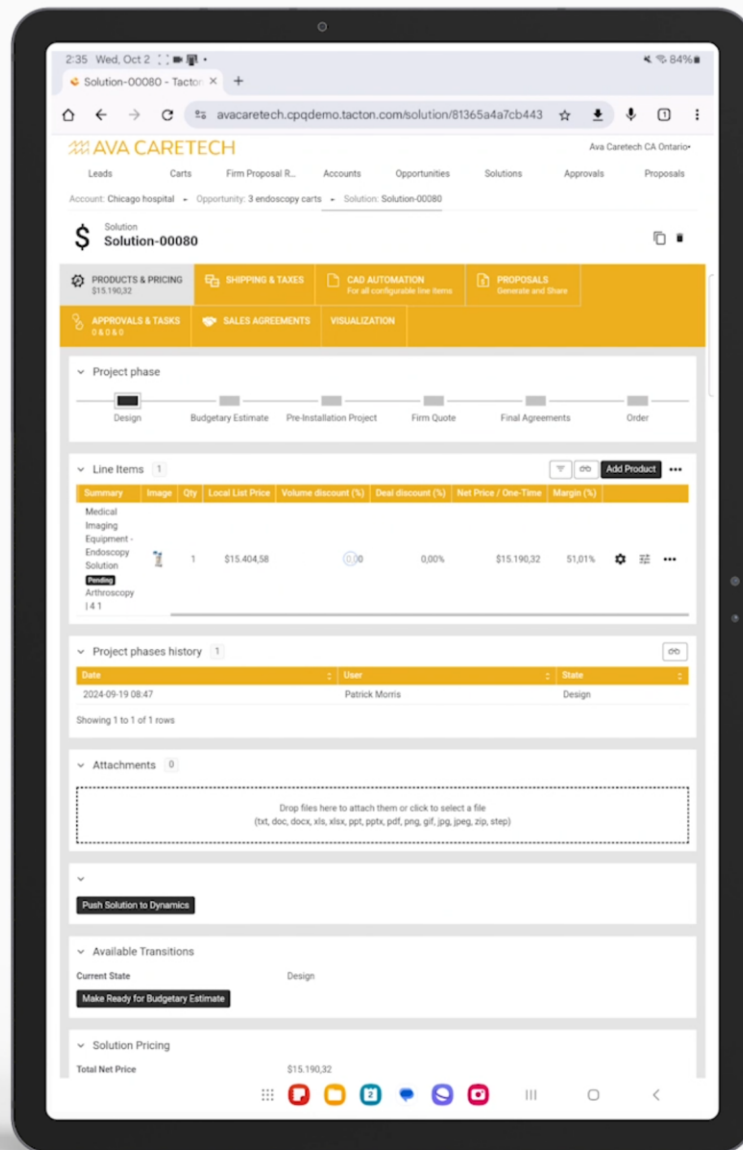


Augmented Reality for Android



Augmented Reality for Android



Video!



Delta Pricing

Improved support for displaying prices for options and accessories before they are selected, to support the sales rep when the customer asks "How much is it?".

Display as list or delta price using correct currency.

Fork	 Shox fork	
Wheel 	Fox fork	+EURO801.00
	Shox fork	
		+EURO150.00
		+EURO270.00

Delta Pricing

Engine Selection

12L Cummins X12 (2018) 380hp engine

15L Cummins X15 Performance Series (2017) 505hp engine	+\$209
15L Cummins X15 Performance Series (2017) 485hp engine	-\$750
15L Cummins X15 Efficiency Series (2017) 400hp engine	-\$1,295
15L Cummins X15 Efficiency Series (2017) 450hp engine	-\$1,297
15L Cummins X15 Efficiency Series (2017) 500hp engine	-\$1,460
12L Cummins X12 (2018) 500hp engine	+\$609
12L Cummins X12 (2018) 475hp engine	+\$624
12L Cummins X12 (2018) 455hp engine	+\$435
12L Cummins X12 (2018) 430hp engine	+\$303
12L Cummins X12 (2018) 430hp engine	+\$241
12L Cummins X12 (2018) 410hp engine	+\$226
12L Cummins X12 (2018) 400hp engine	+\$37
12L Cummins X12 (2018) 380hp engine	

ZF - Ecosplit gearbox \$12,684

ZF - Ecomat for trucks gearbox \$5,936

ZF - AS Tronic mid gearbox \$5,741

ZF - AS Tronic lite gearbox \$5,707

Visualization

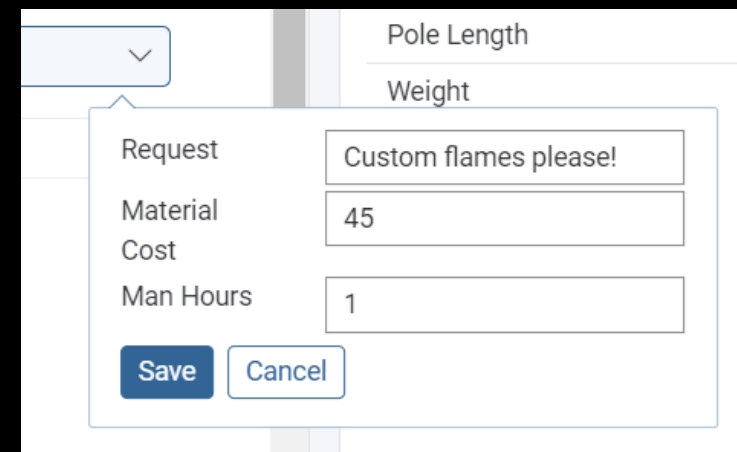
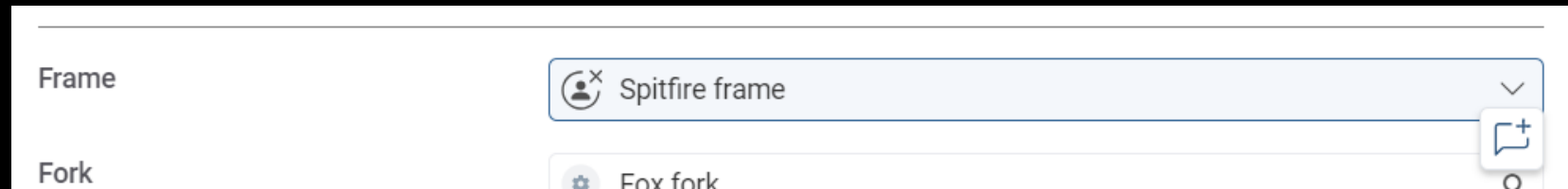
Pricing

BoM & SRs

Inline BOM Edits

Add notes and other information to selections during configuration to capture custom requests and more.

Makes it easier and faster for Sales Reps to add custom requests.



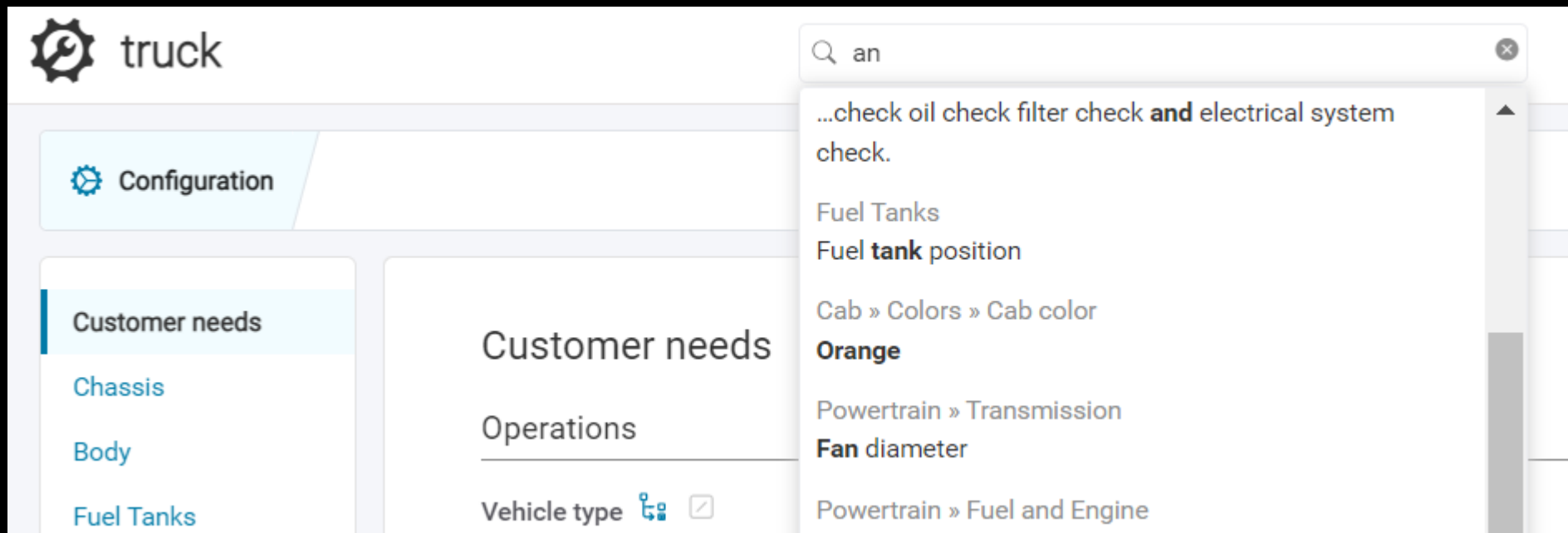
Find

Search and find questions, options, variants when needed.
Easily select option.



Find

Search and find questions, options, variants when needed.
Easily select option.



Custom Actions

For the Related Objects Panel
Automate tasks with a script

Custom Actions

Actions ▾ 0 row(s) selected

	Name	Label
<input type="checkbox"/>	Split	Split Runs

1-1 of 1

Vehicle Change Orders

A quote of 10 identical vehicles creates 10 orders when closed. Need a way of handling change orders where some vehicles need a different configuration, sometimes referred to as Split Runs.

New custom actions on the related objects panel to support this process.

With this, Sales Reps can utilize the power of the configuration logic also for change orders.



Indexed Constraints

Constraints operating over multiple dynamic positions, for example: $\text{Nozzle}[i].\text{size} = \text{Seal}[i].\text{size}$

Makes it easier and more efficient for Modelers to model and maintain complex parts.

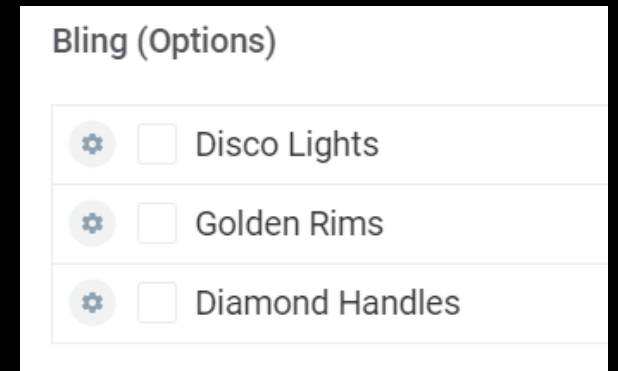


Options for Accessories




Native support for Options and Accessories, i.e. parts where SalesRep pick 0-1 or 0-n of each with a compact layout.

Makes it easier and faster for Sales Reps to select which options to include.

It is also easier and faster for modelers to build and maintain.



Bling (Options)

	<input type="checkbox"/>	Disco Lights
	<input type="checkbox"/>	Golden Rims
	<input type="checkbox"/>	Diamond Handles

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Tacton
CPQ SaaS

Pricing

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Salesforce
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Data Import
Automation

Enhanced
permissions in
Tacton Admin

Product
Validations

System
Configuration

Environmental
Footprint
Configuration

Layout
Planning



Tacton Integrations Powered by ...

Mathias Roitto, Principal Solution Architect Tacton

Who Am I?

Mathias Roitto

Principal Solution Architect

Hockey player

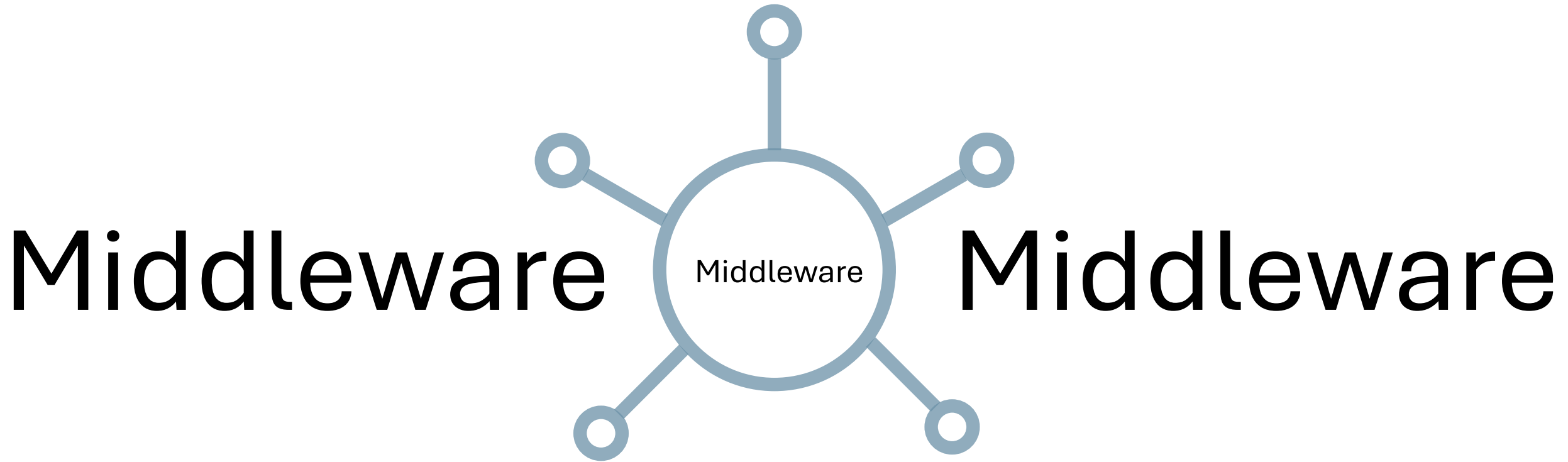
**“Hockey is a metaphor for life.
You have to be willing to get
knocked down and get back up.” –
Mike Eruzione**



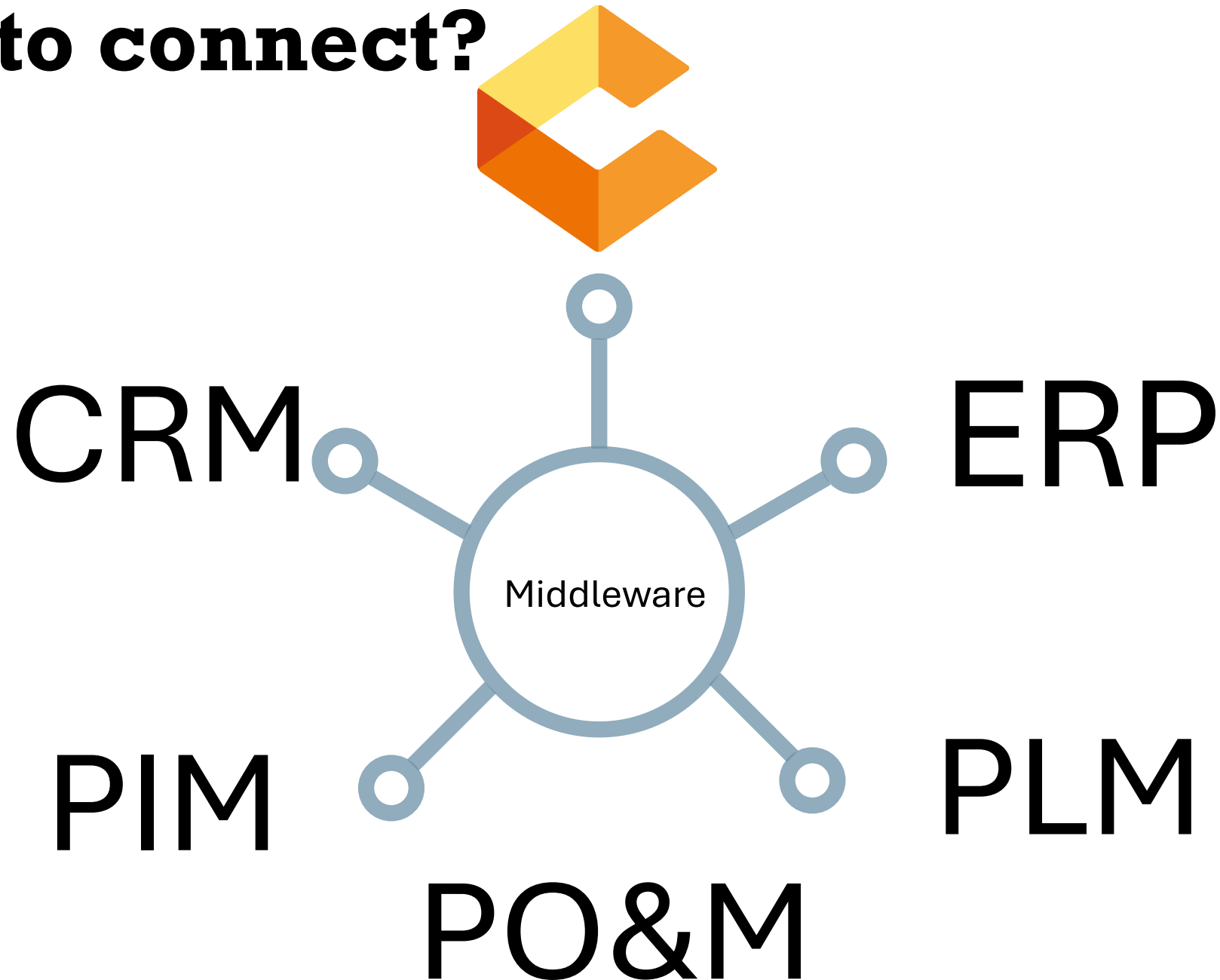
Your System Landscape



How to connect?



How to connect?

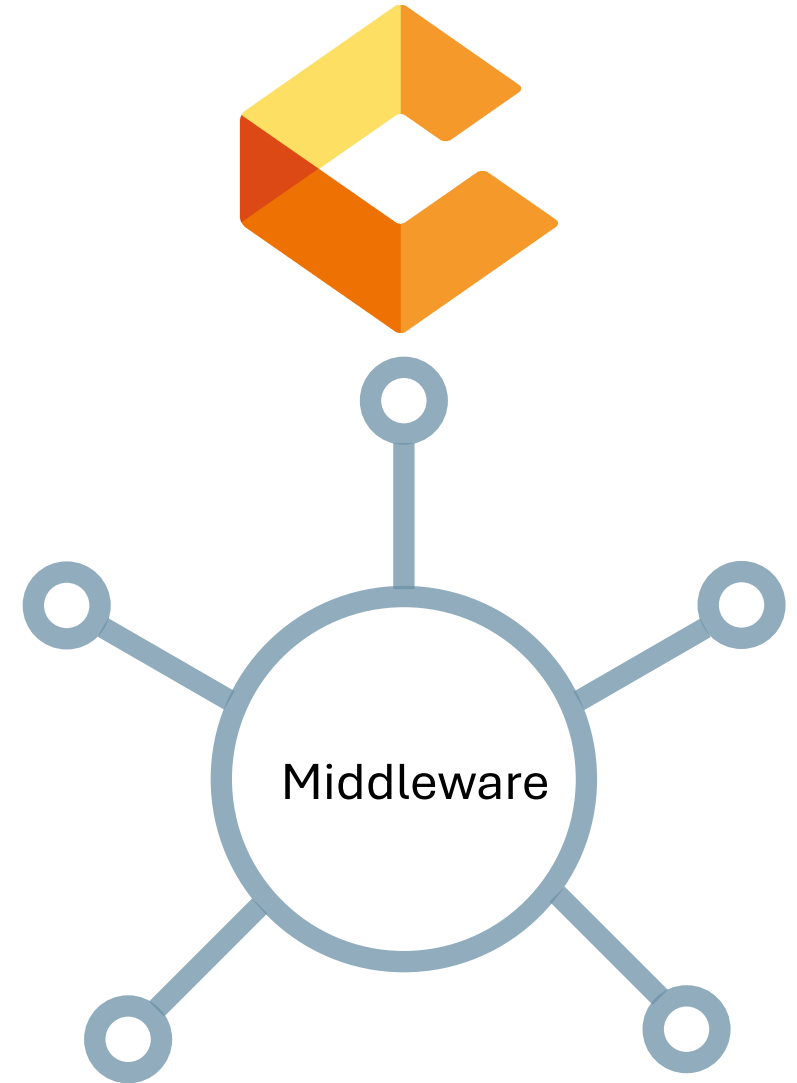


Middleware

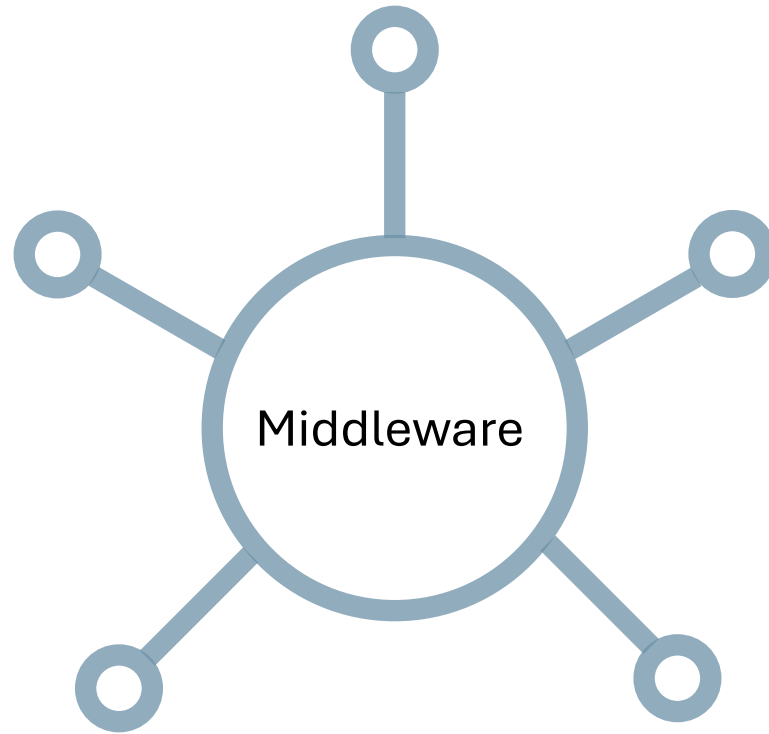
Connector to each system

Orchestration of the integrations

Transforming data between formats



Middleware



workato

tacton 

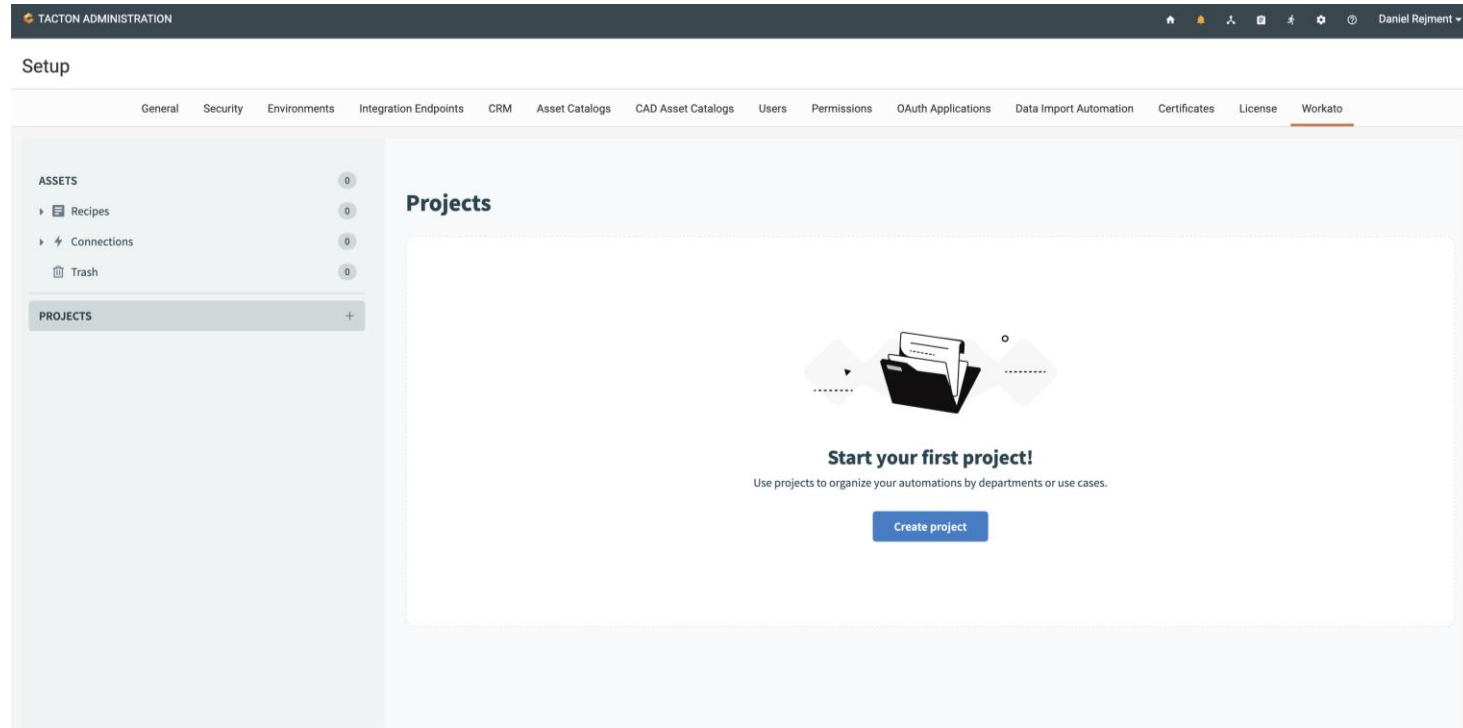


Why Workato?

Workato embedded in Tacton CPQ



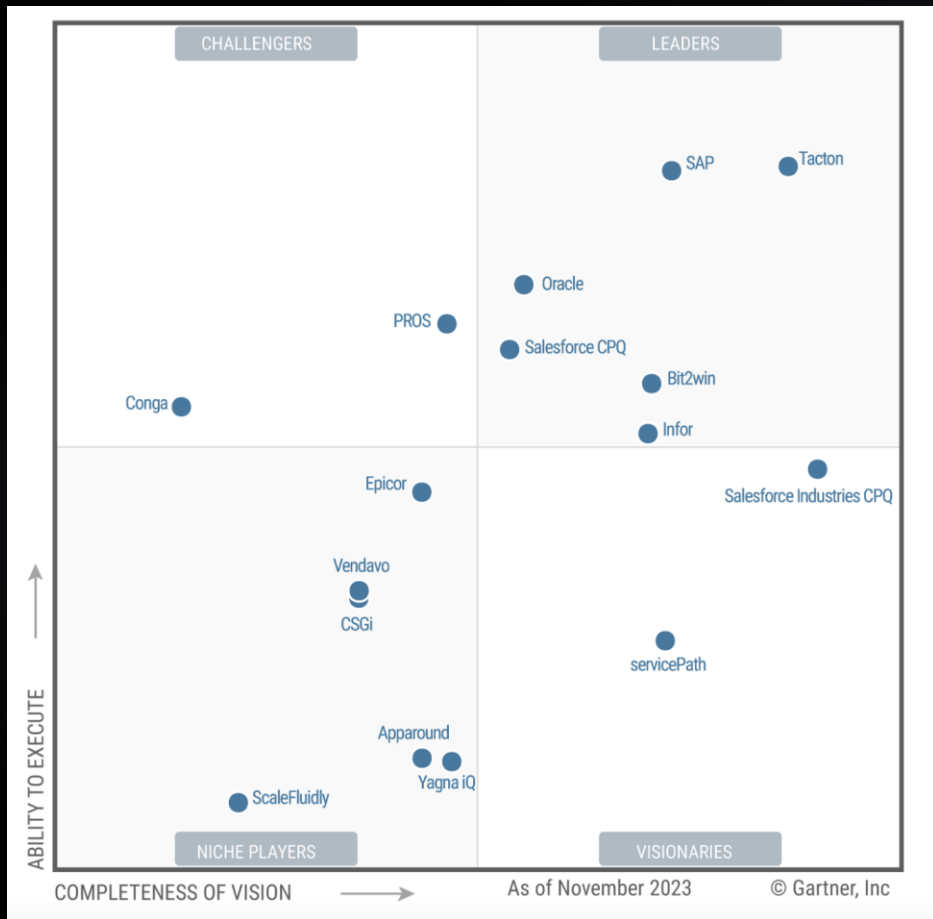
Workato embedded in Tacton CPQ



Integrations with Tacton, Powered By Workato



MQ – CPQ and Middleware



Powered By Workato

No-code/Low-code platform:

Allows business users to create automated workflows without extensive programming knowledge.

Integration Hub:

Connects applications, databases, and services across various platforms (e.g., Salesforce, Slack, HubSpot).

Automation: Automates complex business processes such as onboarding, lead management, and data synchronization.

Pre-built Transformations: Offers thousands of pre-built "recipes" for common integrations, making automation faster and more efficient.

Scalable: Suitable for both small businesses and large enterprises.

Security & Compliance: Ensures data security through built-in compliance with enterprise standards.

AI-powered Workflows: Leverages AI to enhance workflow automation and decision-making processes.



Connectors Powered By workato



Connectors Powered By workato

Use pre-built smart connectors to 600+ SaaS apps and databases



Salesforce



Slack



Marketo

ORACLE
NETSUITE

NetSuite SOAP



Box



Workday



ServiceNow



Snowflake



HubSpot



Zendesk



Jira



Zoom



Ocodekit



10,000ft



3 D Repo



Abby
Flexicapture



Abby
Vantage



AbuseIPDB

aconex

Aconex



Action
Network

tacton 

Connectors Powered By workato

Build additional connections easily with Workato's Connector SDK



Your System Application

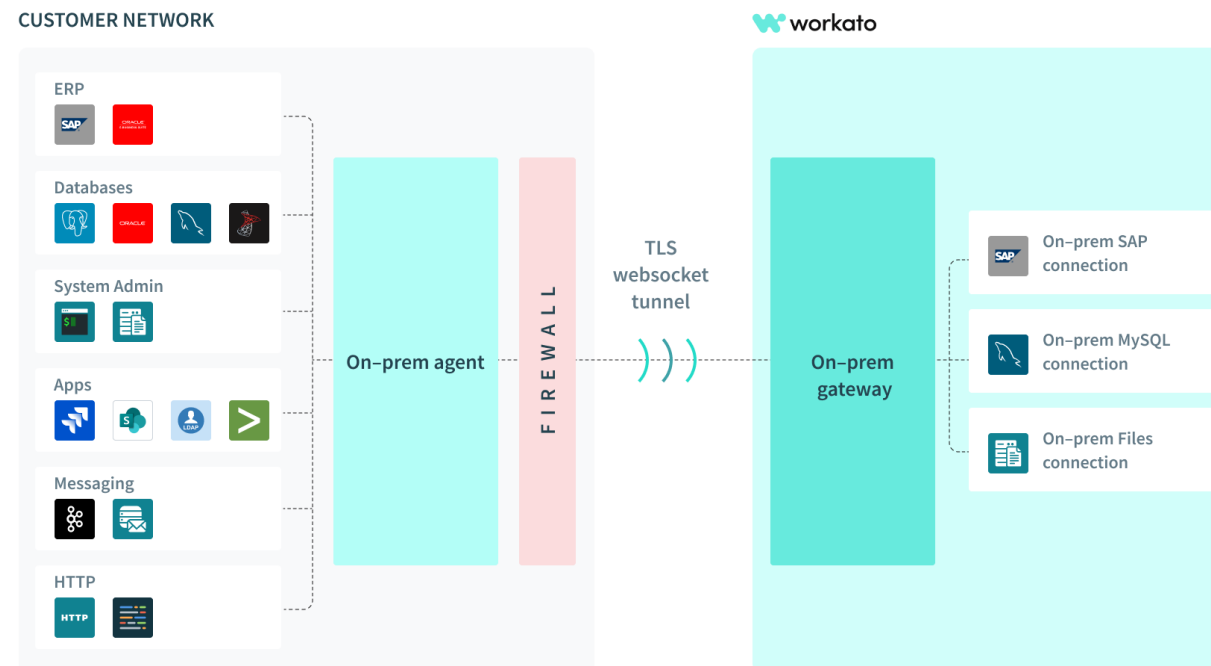


Created on Sep 25, 2024 9:42 PM

Never released

Connectors Powered By workato

On-prem agent provides a secure way for selectively access customer-authorized integrations to on-prem apps, databases, and folders without having to open ports in the corporate firewall.



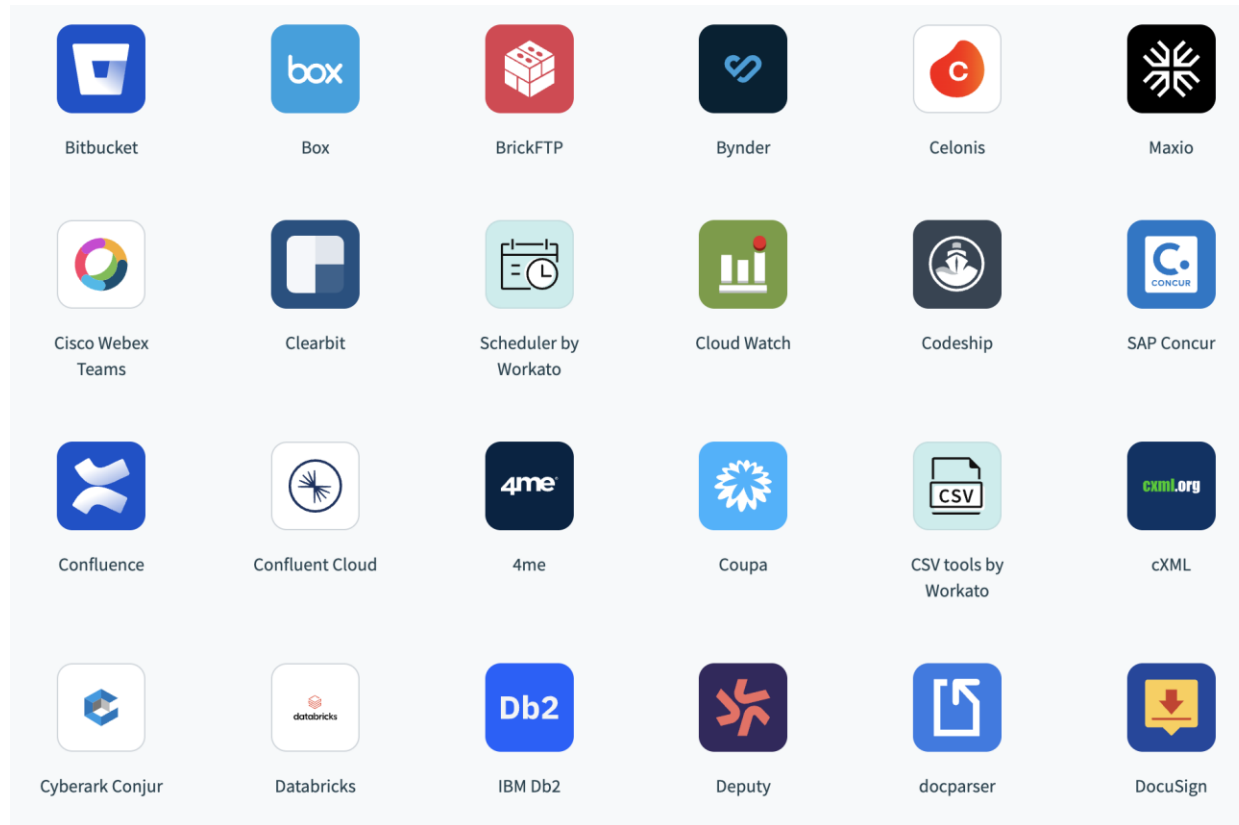
Recipes Powered By



Recipes Powered By



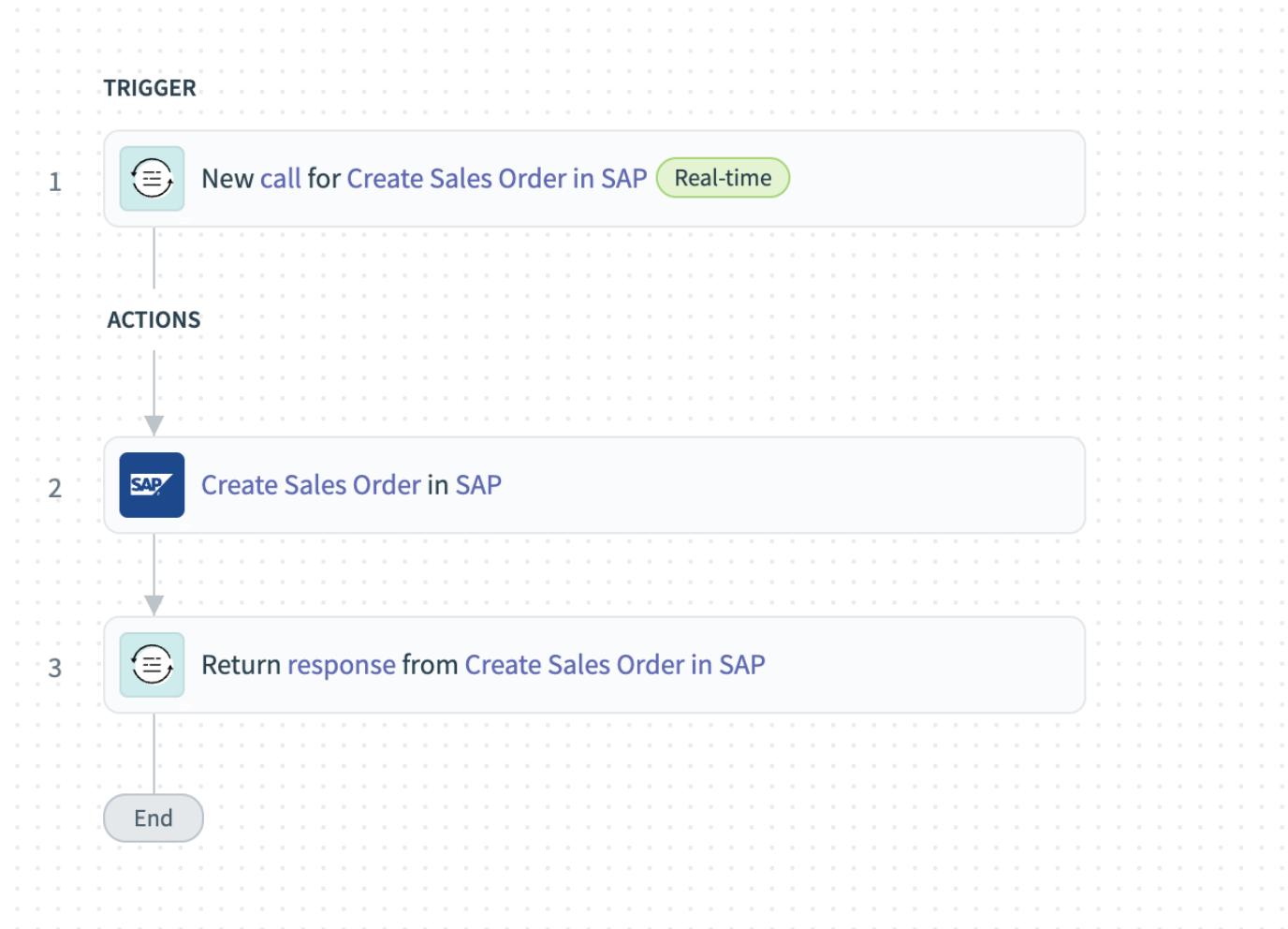
Many pre-built recipes in the library, ready to be used



Recipes Powered By



Many pre-built recipes in the library, ready to be used



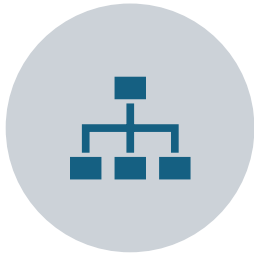
Recipes Powered By



Create your own, reusable recipe

A screenshot of the Workato interface for configuring a recipe. The breadcrumb trail at the top reads 'Projects > Home assets > My new recipe : Recipe'. The main title is 'My new recipe' with an edit icon. On the right, there are buttons for 'Edit', 'Start recipe', and a dropdown menu. Below the title, there are tabs for 'Recipe', 'Jobs', 'Versions', 'Test cases', and 'Settings'. The main workspace is a canvas with a dotted grid. It is divided into two sections: 'TRIGGER' and 'ACTIONS'. The 'TRIGGER' section contains a single step labeled '1' with a lightning bolt icon and the text 'Select an app and trigger event'. The 'ACTIONS' section contains a single step labeled 'End'. On the right side of the canvas, there are controls for 'Fullscreen', zoom in (+), zoom out (-), and reset (circular arrow). To the right of the canvas is a summary panel. It shows the recipe status as 'Inactive'. Below this, there are two columns: 'Successful jobs' and 'Failed jobs', both showing a count of '0'. Further down, it shows the 'Location' as 'Home assets' with a 'Move' button. It also indicates the recipe was 'Edited Jul 9 9:24 AM' and has 'No assets used' as dependencies. At the bottom of the summary panel, there is a 'Description' section with a '+ Add description' button. An 'AssistIQ' logo is visible in the bottom right corner of the interface.

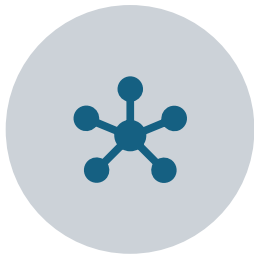
Why embed?



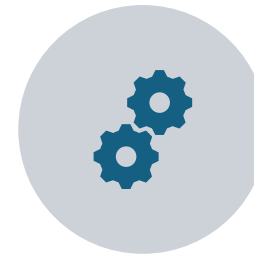
No need to rely on you IT department to free up resources to build your integrations.



Connect using existing connectors or build additional connections easily with the Connector SDK



Tacton Integration Powered by Workato will give you a great starting point, all in one contract with Tacton.



Manage, monitor and deploy, all from within Tacton CPQ administration





Implementation



TACTON



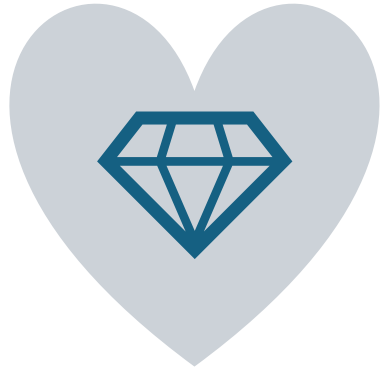
TACTON PARTNER



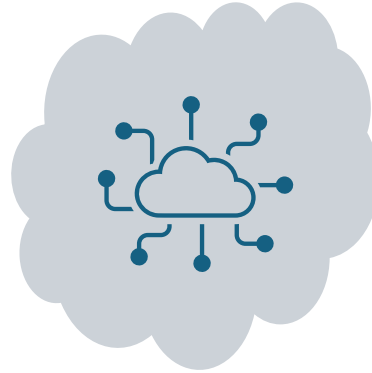
YOU



Value



BRINGING VALUE EARLIER IN THE PROCESS



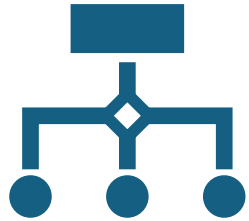
INTEGRATIONS ALREADY IN PHASE 1



INTEGRATED ORDER ENTRY WILL ALLOW YOU TO INVOICE YOUR CUSTOMERS ALREADY FROM THE FIRST RELEASE OF TACTON CPQ



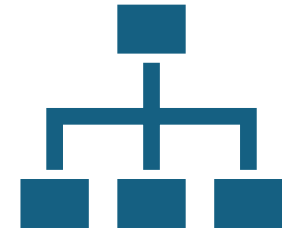
Enterprise readiness



All connectors and recipes can be transferred to a stand-alone Workato in the future



You are not locked in using Tacton CPQ as your middleware for your Enterprise solutions



Your team can take over the solution, the same way as Tacton CPQ administration.



Let's get connected with Tacton Powered by Workato



Questions



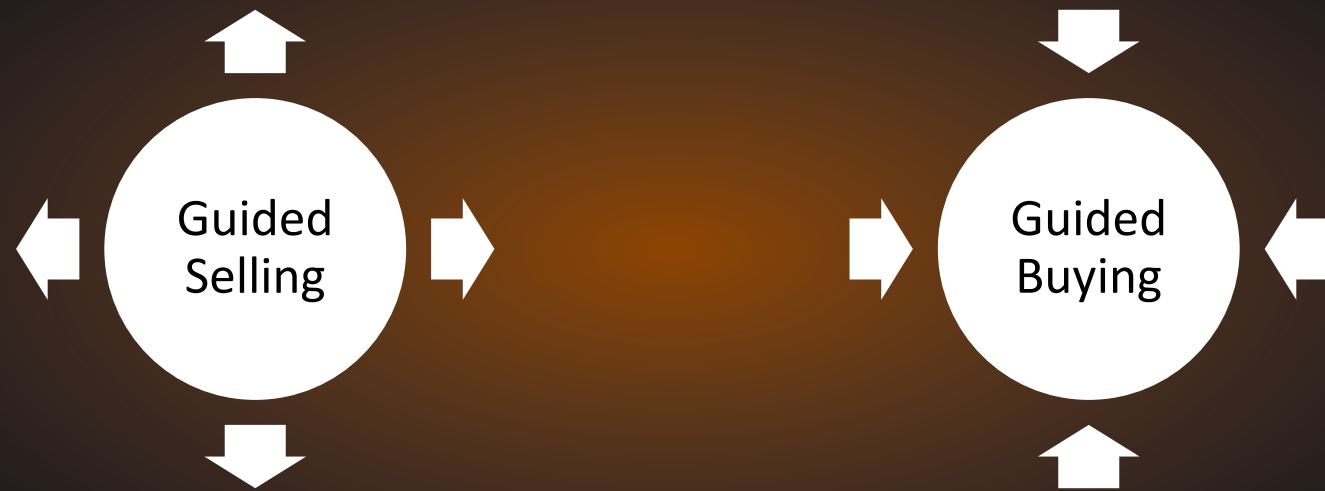
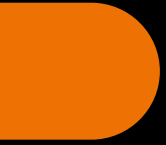
**Lunch break
until 13:45**

Guided Selling

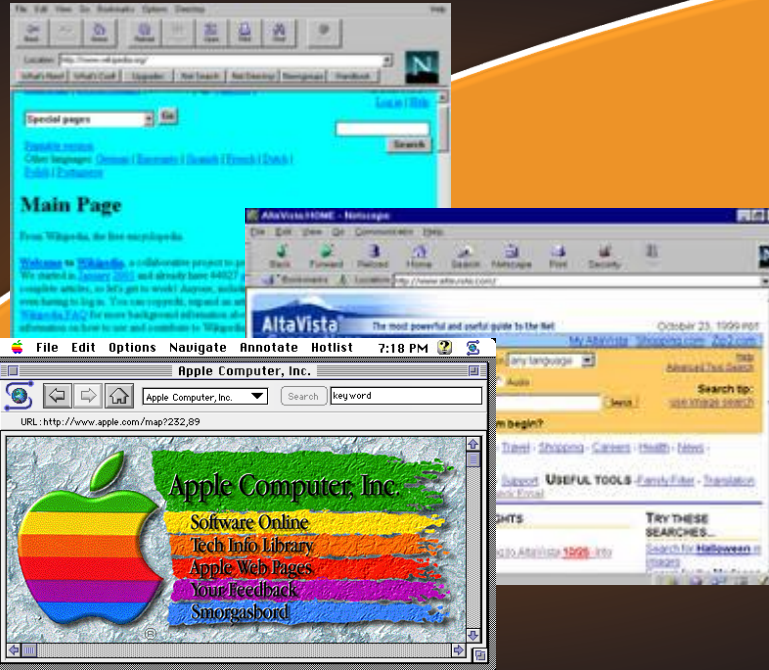
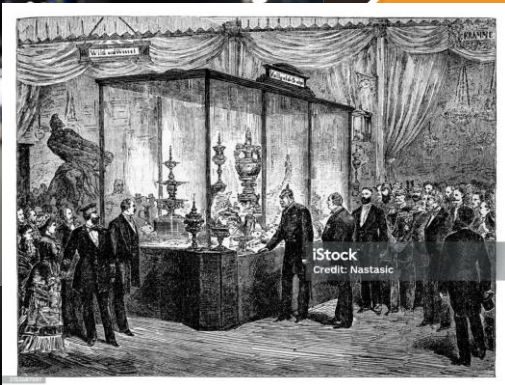
Johan Jacobsson, VP Industrial Advisory Tacton

Guided Buying

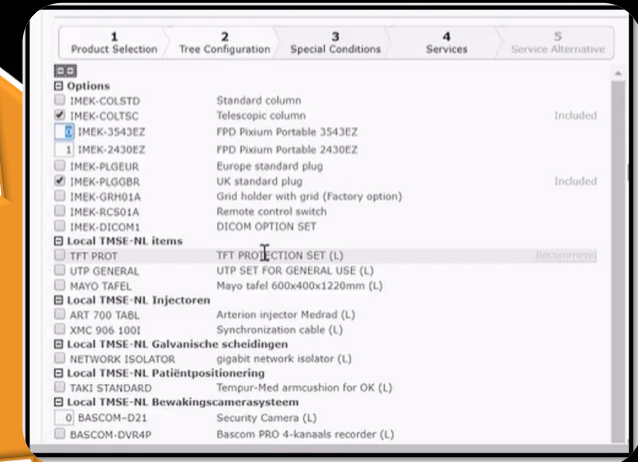
Johan Jacobsson, VP Industrial Advisory Tacton



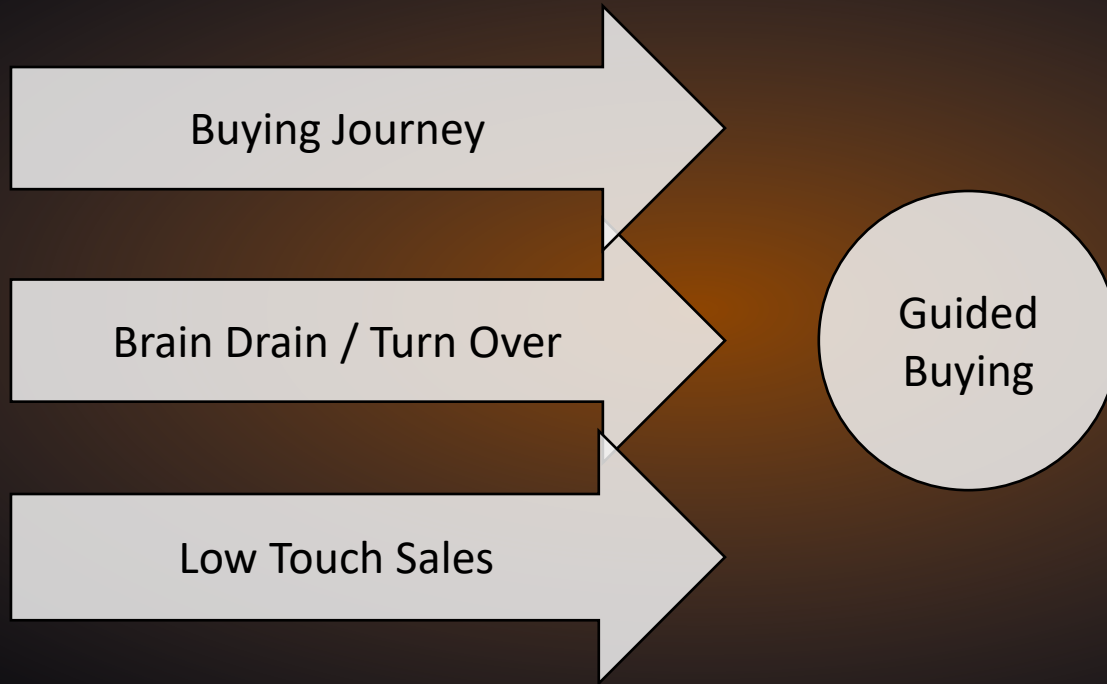
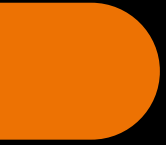
Trade Fairs / Industry Magazine



Internet



Legacy CPQ



Buying Journey

Brain Drain / Turn Over

Low Touch Sales

Guided
Buying

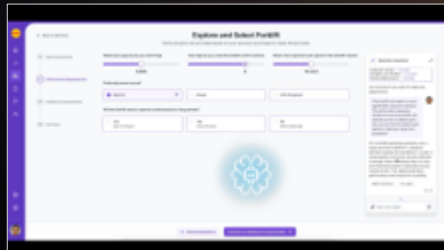
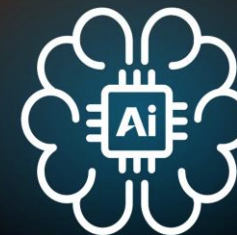
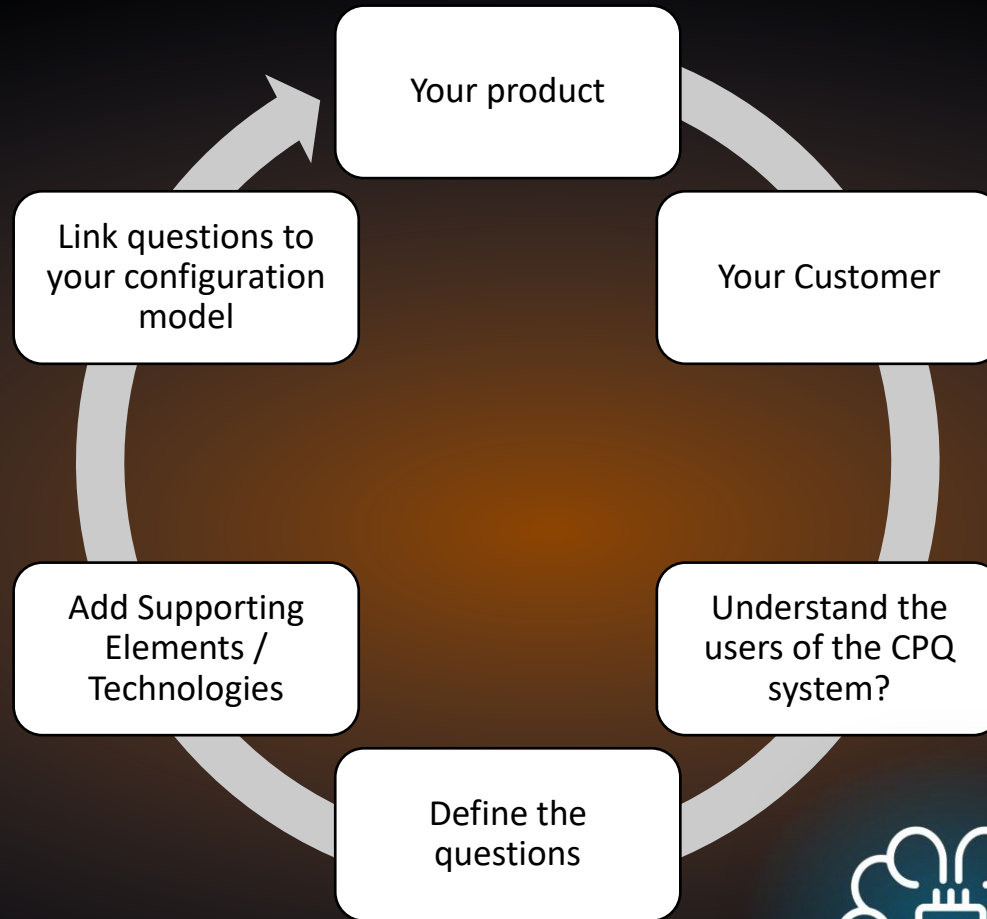
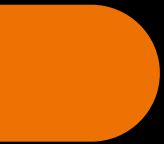
Benefits

- Support the buying journey earlier
- Educate your customers
- Build trust
- Improved Customer Satisfaction
- Reduced Sales Cycles
- Ramp up your sales reps to productivity faster or enable low touch sales
- Study potential customers' behaviour



What is stopping organizations?

- We do not have time for this now – we will add it later
- Our sale is too technical, or too many parameters must be defined – or it requires a site visit – or...
- We want to maintain a tight relationship with our customer
- Systems Performance – its ok for direct sales but not for self-service. We can not expose current systems online.



Users

User groups and Sales process
For each product:

- List the user groups using the configurator.
- Define their technical level and in which context they are buying.
- How large part of the sale is expected to come from this group?

Product	User group (role)	Sales context, user technical level	Part of total sales	Support needed
Activation	Final customers	Shop shops, no technical knowledge	85%	Design help
Activation	Salespeople at outlets	Over shops, Good technical knowledge	15%	---

Different Experiences

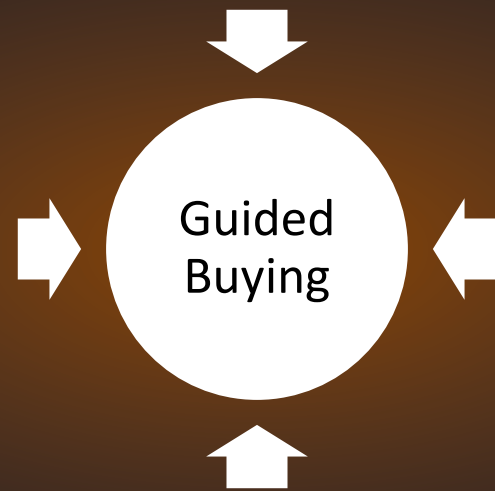
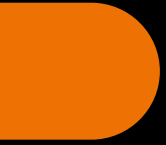
Final Sales, Sales Progress, Sales of Distributors, Customer Self Service



- Meet your customers in their buying process
- Win rate improvements
- Number of Quotes increases

- Shorter Sales cycles
- Increased Customer Satisfaction

- Ramp up your sales reps to productivity faster
- Enable rep-free sales for complex products – low touch sales
- Learn about your customers



Ominchannel Sales

Per Rohdin, Senior Product Marketing Manager Tacton

Sales channels - Pros and cons

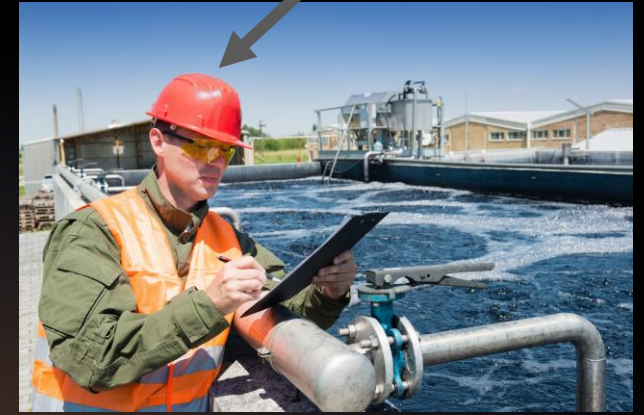
Digital Native



Pump Manufacturer



Pump distributor & system integrator



End customer – Water Treatment facility manager

Direct Sales

- +** You own the customer relationship
- Expert sales
- High cost of sales
- Low market reach
- Ramp ups
- Sales rep attrition

Partner Sales

- +** Lower cost of sales
- Larger market reach
- Local presence
- Less skilled sales reps
- Selling competitor brands
- Quote and order errors
- Customer relationship owned by partner

Customer Self-service

- +** Convenience for end customer
- Reduced cost of sales and CAC
- Global reach – always available
- Revenue growth
- You own the customer relationship
- Requires efforts from customer
- Buying the right thing?
- Too complex?

The challenge for B2B Manufacturers

- How to bring the power of Configure-Price-Quote to all sales channels
- How to make B2B buying so smooth, transparent and convenient that even end customers themselves can define their solutions

Direct Sales

Partner Sales

Reseller
Distributors
Dealers
System Integrators
OEMs

Customer Self Service

Digital Commerce
eCommerce
Customer Portals

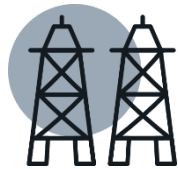
Your highly customizable B2B Manufacturing products



MACHINERY



PRODUCTION
LINES



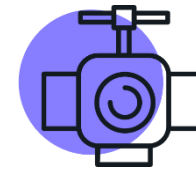
POWER
GENERATION



MEDTECH
EQUIPMENT



HEAVY VEHICLES &
EQUIPMENT



PROCESSING &
CONTROL OF
FLUID & GAS



VERTICAL
TRANSPORTATION
SYSTEMS

The benefits of self-service is clear

Top Benefits of Digital Commerce for Sellers Percentage of Selling Organizations



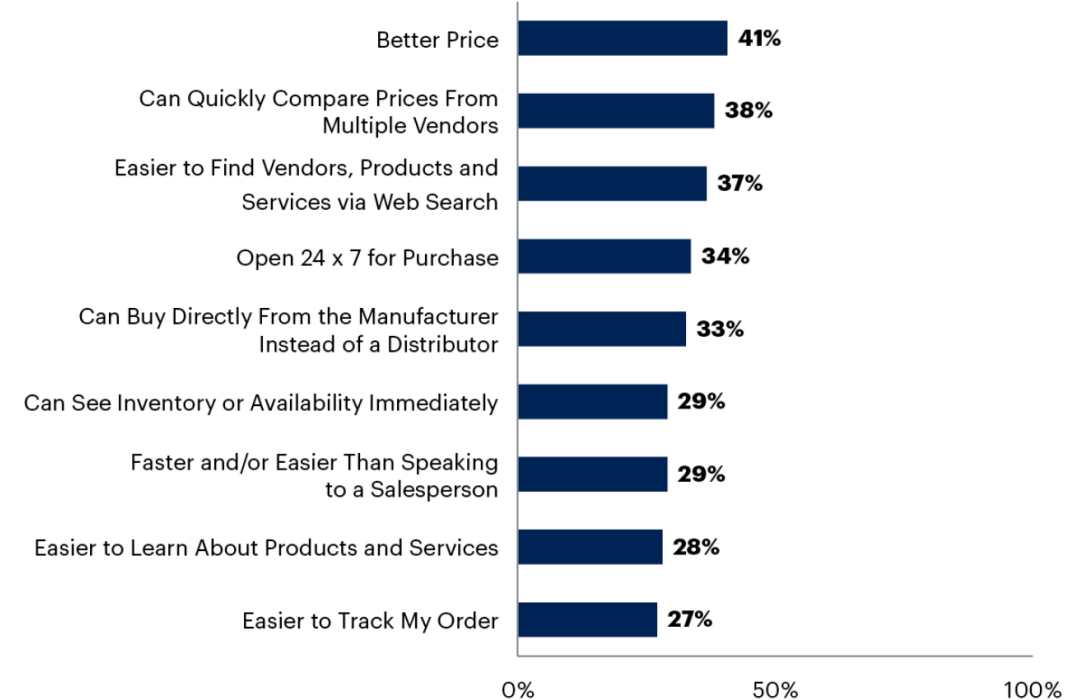
n = 180, excludes unsure

Q: What are the top 3 benefits of selling B2B products and/or services through websites at your organization?

Source: 2020 Gartner B2B Digital Commerce Survey

744091_C

Top Benefits of Digital Commerce for Buyers Percentage of Procuring Organizations



n = 198, excludes unsure

Q: What are the top 3 benefits of purchasing B2B products and/or services through websites at your organization?

Source: 2020 Gartner B2B Digital Commerce Survey

744091_C

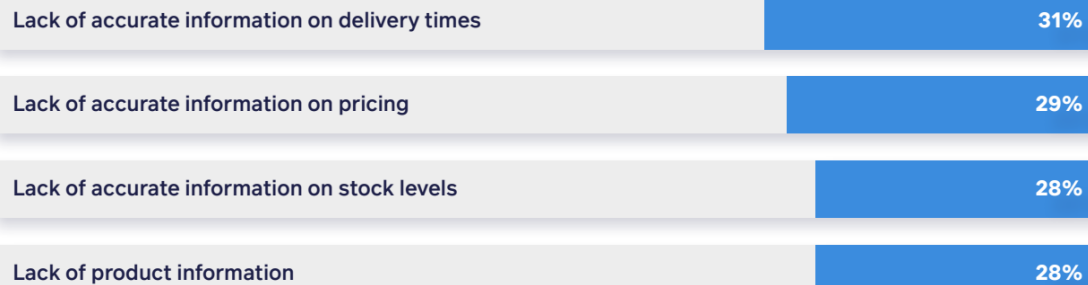
Gartner

Addressing the expectations of digitally native buyers

Challenges

Why is B2B digital commerce not booming?

When asked what their main hurdles are to online purchasing, B2B buyers said:




68% of B2B buyers report being put off from ordering online due to order errors.

These challenges increase with more complex products and solutions

Trust and reliability

In the responses to the survey, B2B buyers reiterated their preference for transparency and more information overall, saying their preferences are:



When it comes to solving issues like low web store adoption, it's not a question about whether or not customers want online buying. The research shows they unequivocally do. It's the quality of what you can provide in your web store that makes the real difference in determining if they will adopt it.

Dilemma: CPQ or Digital Commerce platform?

CPQ

- + Support for complex products
- Assisted channels mostly

Digital Commerce Platforms

- + Self-service channels
- No support for selling complex products

Direct Sales



Partner Sales

Reseller
Distributors
Dealers
System Integrators
OEMs

Self Service

Digital Commerce
eCommerce
Customer Portals



Tacton CPQ Omnichannel

Direct Sales



Partner Sales

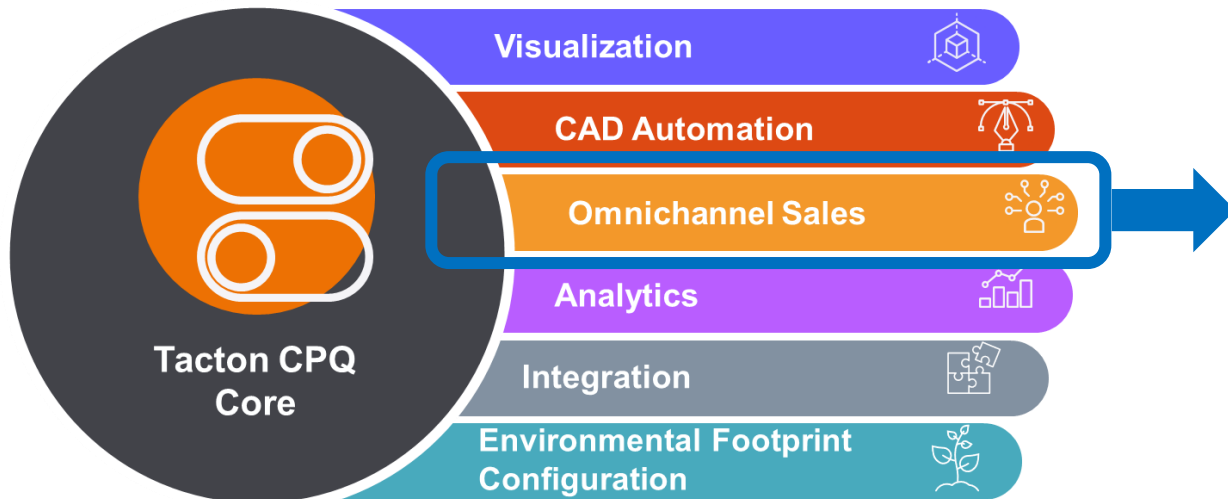


Reseller
Distributors
Dealers
System Integrators
OEMs

Self Service



Digital Commerce
eCommerce
Customer Portals



Bring the power of CPQ to your **sales partners** and **end customers**

Embed your CPQ anywhere and anyhow

The screenshot shows the Husky CPQ website interface. At the top, there is a navigation bar with the Husky logo, links for 'CONFIGURE A PRODUCT', 'PRODUCTS', 'RESOURCES', and 'SUPPORT', and a 'Sign In / Register' button. Below the navigation bar, the main content area features the heading 'SELECT A PRODUCT TO CONFIGURE'. Two product categories are displayed: 'HOT RUNNERS PRONTO DIRECT™' and 'CONTROLLERS NEO5™'. Each category includes an image of the product, a brief description, and a 'Configure This Product' button.

The screenshot shows the AVA CARETECH CPQ application configuration interface. The top navigation bar includes the AVA CARETECH logo and the text 'MEDICAL IMAGING EQUIPMENT - ENDOSCOPY'. The main content area is titled 'Application' and features a sidebar with three sections: 'Customer needs - functionality', 'Technical requirements', and 'Services'. The 'Technical requirements' section is expanded, showing options for 'Medical Field', 'Ocular Inspection', 'Biopsy Part', 'General Surgery', and 'Electric Surgery'. A 'Bill of Material' section at the top right displays a price of '\$9,514.74' and 'Full summary'. A large image of the medical equipment is shown on the right side of the interface.

- Your website
- Customer/Partner Portals
- eCommerce platforms

- Rich and agnostic APIs

Making configuration easy – even for non-technical buyers

Advanced product variance – showcase, price and quote full portfolio

Solution selling (products + services)
Mixed price types

Configurator validates all product logic - after every user selection – always a valid product

Guided selling – easy to understand questions, also for non-tech users

Automatic Market Compliance

Conflict resolution - Impossible to make mistakes

Mandatory fields

Tailor product configuration based on previous purchases

Visualization and AR to make sure product is right (+easy sharing)

Delta Pricing

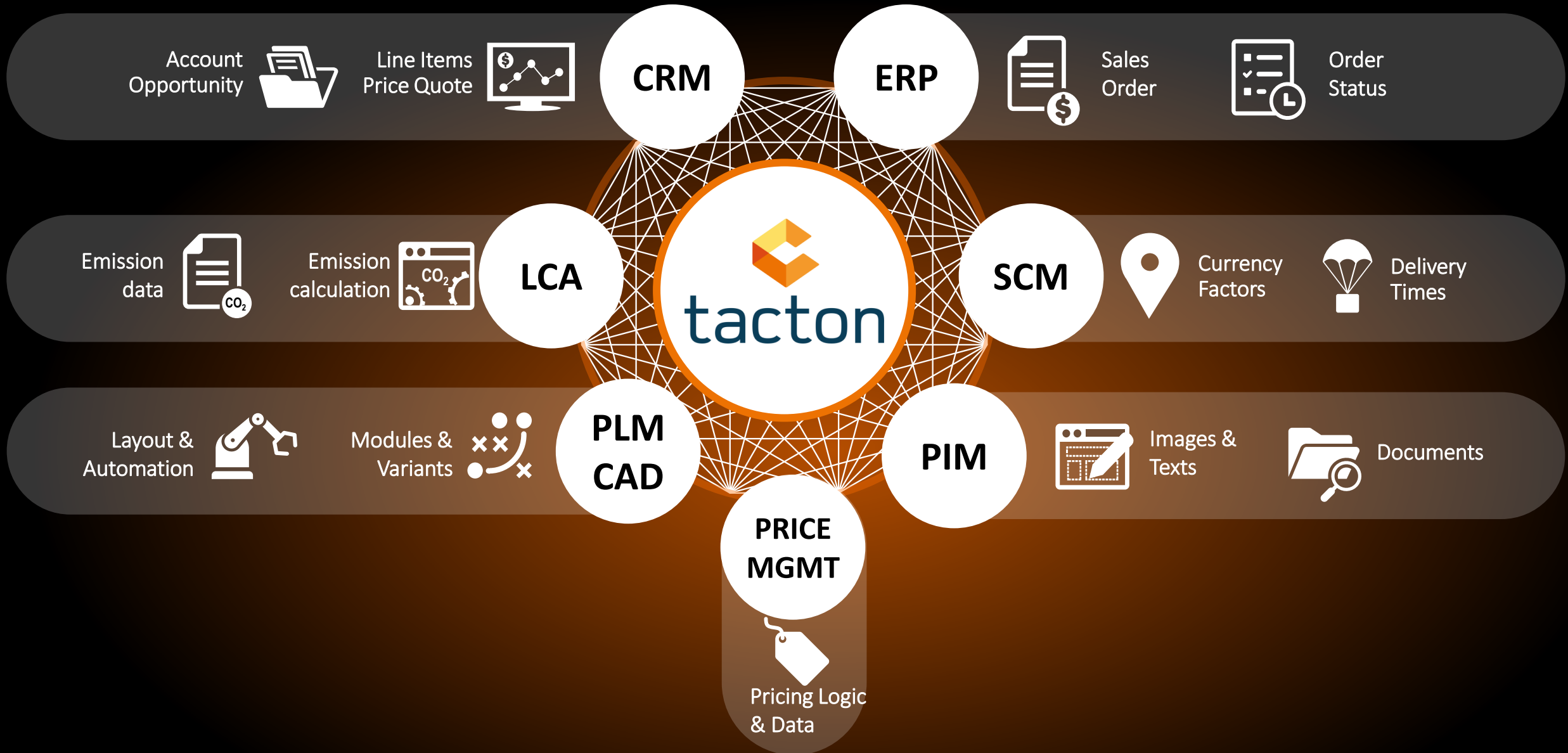
Instant net prices

Easy to add accessories and add-ons

Optimize based on purchasing drivers

The screenshot displays the Parker Lifts configurator interface. On the left, a sidebar lists three main sections: 1. Customer needs - functionality, 2. Technical configuration, and 3. Services. The main content area is titled 'ELEVATOR Application and elevator' and includes a 'Bill of Material' section with a price of '\$294,398'. The configuration options are as follows: 'Installation site country' is set to 'USA'; 'Application' is set to 'Residential'; 'No. Of Floors' is set to '2'; 'Number of passengers' is set to '3'; and 'Low noise required?' is a toggle switch that is currently turned on. At the bottom of the interface, there are three buttons labeled 'Show Cabin', 'Show Interior', and 'Show Pan'. The background of the interface features a 3D visualization of an elevator interior.

Data accuracy: Tacton CPQ Data Management

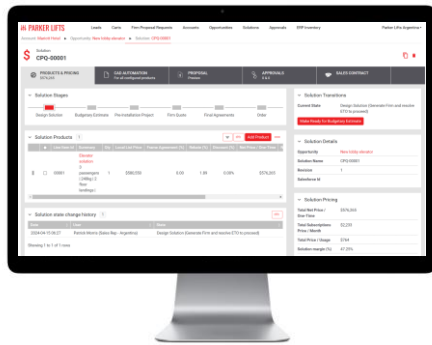


One source of truth ensures data accuracy and reliability

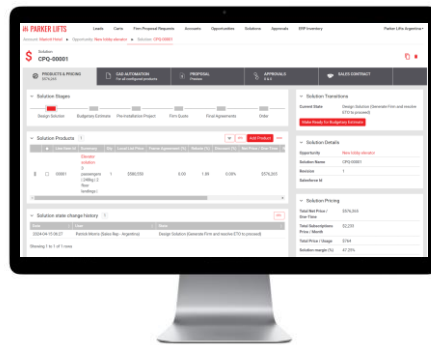
All channels driven by one source-of-truth product definition

Updates to your product or prices are immediately available in all channels

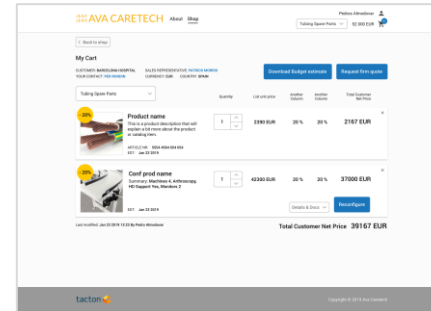
Direct Sales



Partner Sales



Self Service

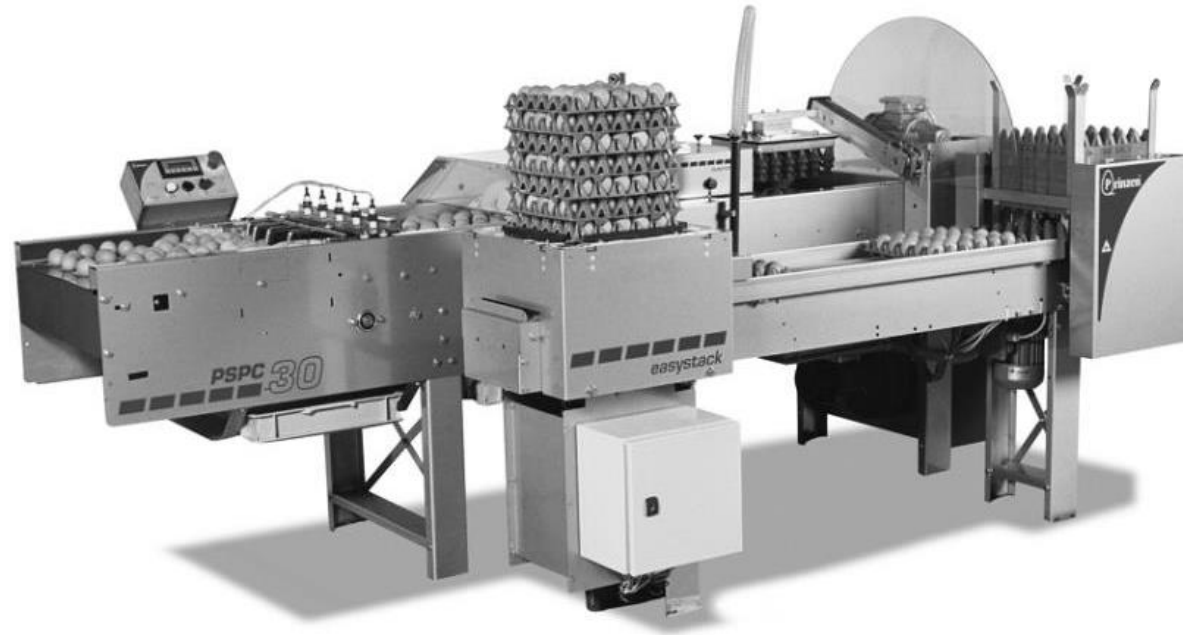


Always correct
product and prices in
all channels!

CPQ Administration
(centralized logic and data for product, pricing,
document etc)

- Avoid product and pricing errors and
- Decrease your time-to-market for your latest and greatest products!

Let your customers and partners configure anything



Tacton's smart configuration technologies

- can express millions of product variants (with configurator performance!)
- separates valid and buildable configurations from unprofitable ones
- 100% accurate technical solution and BoM ready to be sent to ERP

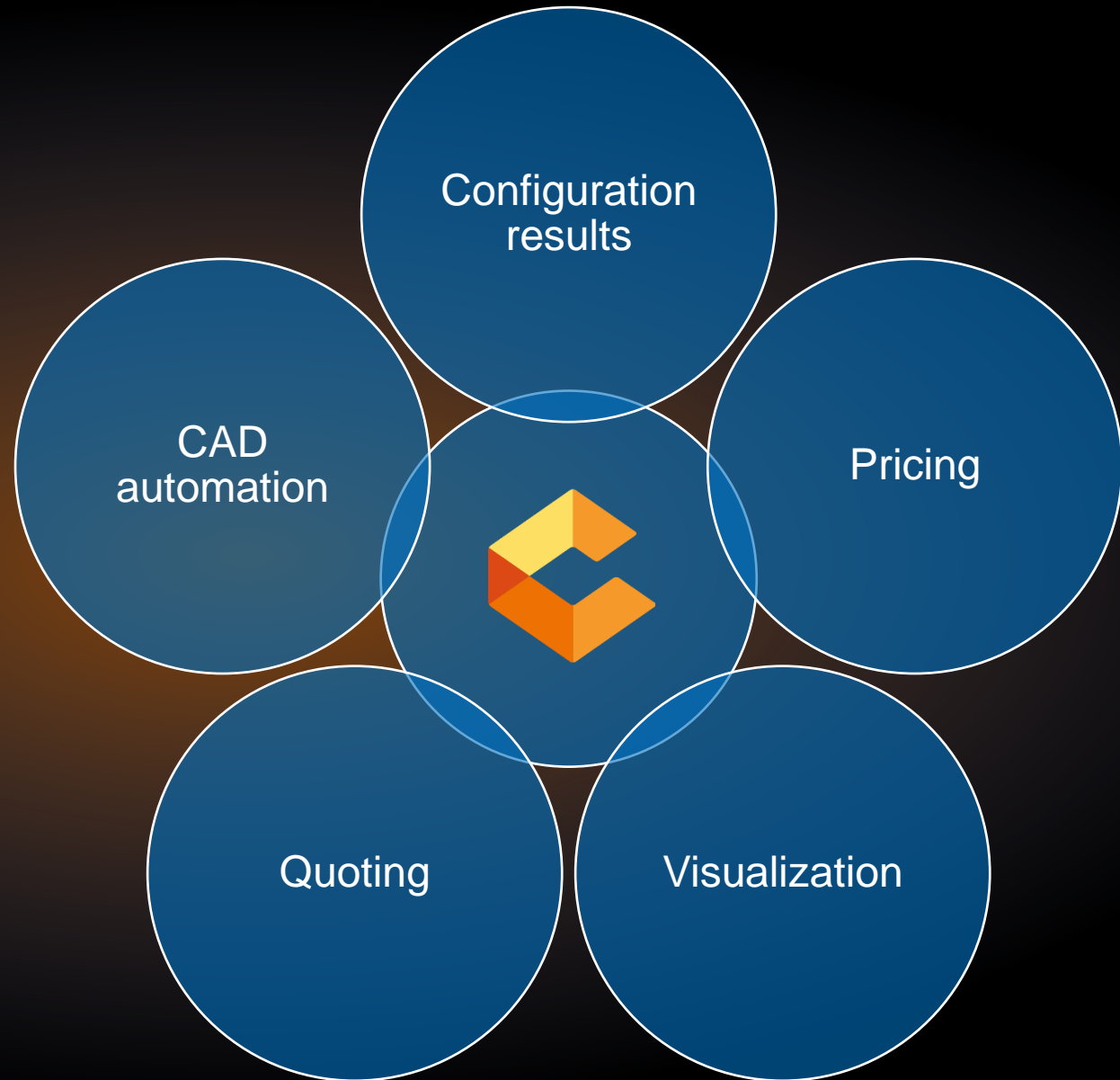
→ **Sell your FULL portfolio online (not only spare parts)**

Flexible UI but integrated sales execution

Everything in a deal is connected – and needs to be aligned

Tacton native integrated platform ensures that all deal data is 100% correct at all times – without integrations to other systems or vendors. For all sales channels.

Minimize integration hassles and maintenance costs



”

**Tacton CPQ Omnichannel Improvements:
Self-Service Channels**

Roadmap features 2024 and onwards

Self-service Channels

TACTON ADMINISTRATION

External Sales Channels

External Sales Channels

0 row(s) selected

	Channel name	Branding	Price model	Product Assortment	Product eligibility	Channel type	Access key
<input type="checkbox"/>	Direct Self-Service US	Blue, rounded	Cost-Plus	2,456	23 limitations	End customer	876345g3488347345g
<input type="checkbox"/>	Direct Self-Service CA	Yellow orange	List-less	1,874	0 limitations	End customer	gh56fgauibj8783jih43
<input type="checkbox"/>	Forklift services Florida	Greenish flat	Rebate plus	900	6 limitations	Partner	356fgs98ahjkiaa7678a
<input type="checkbox"/>	Your Alabama Forklifts dealer	Red squarish	Commission12	2,876	45 limitations	Partner	6537652fhjaas978337
<input type="checkbox"/>	All in Forklifts - Wisconsin	Cheesy pink	Dealer 23	3,435	74 limitations	Partner	26727623fhghgasha76
<input type="checkbox"/>	Hansson forklifts New York	Stick out purple	Cost-Plus	12,056	23 limitations	Partner	sfgshft3552654262gh
<input type="checkbox"/>	Direct Self-Service - Germany	Sandy round	List-Less	1,367	56 limitations	End customer	635763sdjs898shsu67
<input type="checkbox"/>	Local forklifts in Utah	Orange deep	Cost-Plus	3,765	19 limitations	Partner	65fgrte82jlkakjasu787
<input type="checkbox"/>	Your Texas forklift partner	Solid edges black	Cost-Plus	2,568	7 limitations	Partner	sgfhgstds87637468jhs
<input type="checkbox"/>	Direct Self-service - Japan	Funky grey	Cost-Plus	5,762	14 limitations	End customer	5dfhsdghsd9juowonw

1-10 of 10

Not actual design!

Create any number of Sales Channels

Settings per channel:

- Assortment in product catalog
- Assortment in configured product: In the offered configurable products, what selections/ assemblies/ module variants should be offered?
- User experience
 - What questions should be presented to user and how?
 - Branding/Graphic design: Colors, padding, fonts, rounded corners etc.

• ...

Sales channel UI components

Product Catalog

Browse, filter, search and select configurable and non-configurable products to add to cart

Includes Product selector (for customers with hundreds of product models)

Main config dialog

Questions (radio, multiple choice, drop down, text input etc.), notifications, images, conflict resolution

Configuration navigation

Groups and tabs of the configuration

BoM & Pricing

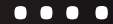
Sales BoM and executed prices after every config selection

Visualization

Viz, Viewpoints, Fullscreen, sharing and AR

Summary/ Info Group panel

The most important selections in the configurator



Each UI component has a code snippet

```
TC tacton-react-components  master
index.html  README.md
1 <!DOCTYPE html>
2 <html lang="en">
3 <head>
4   <meta charset="UTF-8">
5   <title>Trucks & Friends - shop</title>
6   <link href="/client.css" rel="stylesheet"/>
7   <link href="/tacton-icons/css/tacton-icons.css" rel="stylesheet"/>
8 </head>
9 <body>
10
11 <header>
12   <h1>Trucks & Friends</h1>
13 </header>
14 <main>
15   <h1>Here we want to show configurable products</h1>
16
17   <tacton-product-catalog context="main"></tacton-product-catalog>
18   <tacton-configuration-navigation context="main"></tacton-configuration-navigation>
19   <tacton-configuration-panel context="main"></tacton-configuration-panel>
20
21 </main>
22 <footer>
23 </footer>
```

Configuration
navigation

BoM &
Pricing

Product
Catalog

Main config
dialog

Visualization

Summary

Flexible Branding in Tacton Admin

Ticket Details » External Sales Channels » Brandings » test

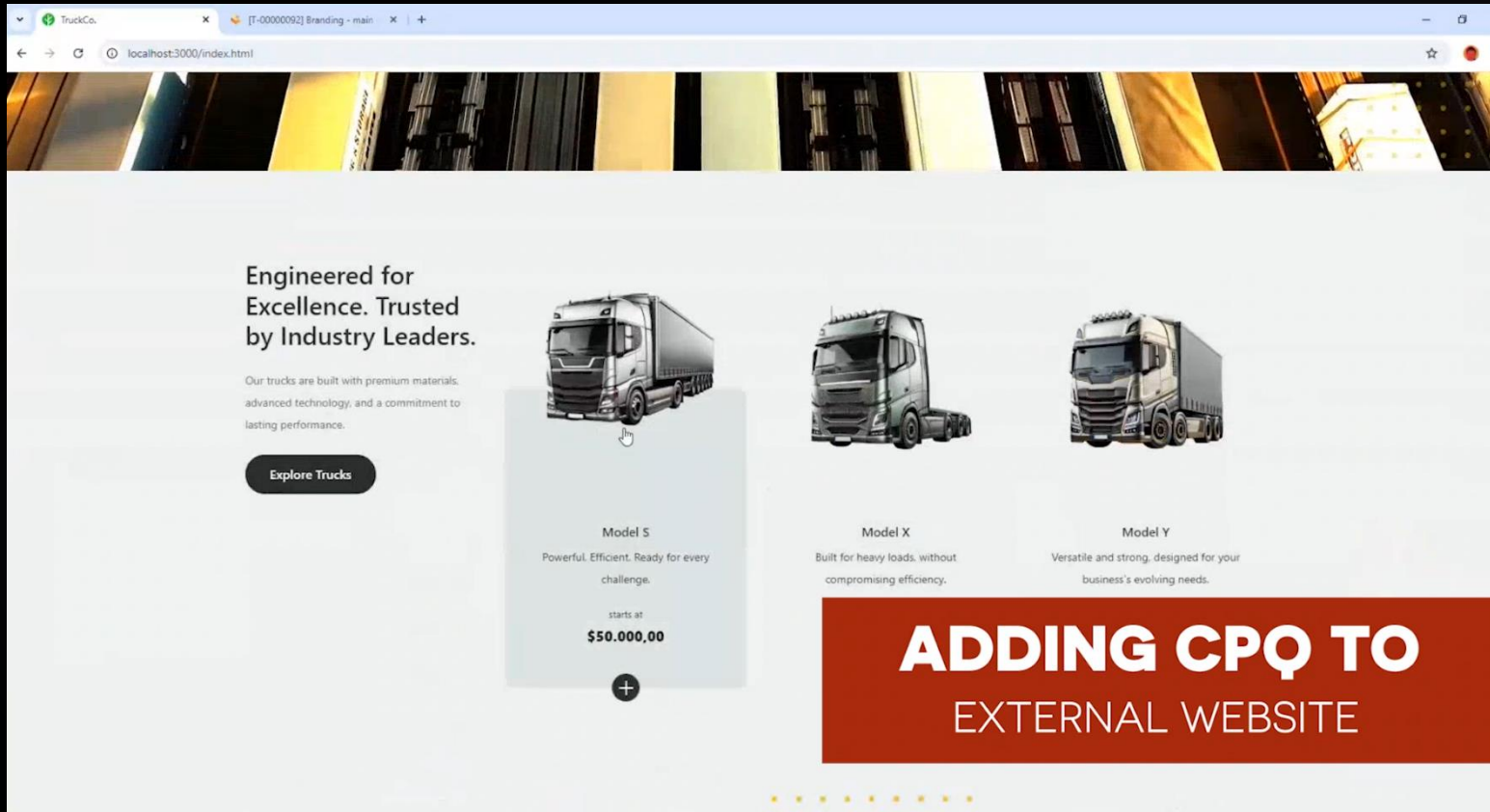
Branding - test

! This ticket requires a rebase to base version 13. [Rebase Ticket](#)

Typography	Spacing	Color	Edges	
Base Text Size	Base Spacing	Accent Hue	Radius	Reset Changes
<input type="range" value="1,0"/> 1,0 rem	<input type="range" value="0,6"/> 0,6 rem	<input type="range" value="120,0"/> 120,0 °	<input type="range" value="0,3"/> 0,3 rem	Set Defaults
Text Increment	Space Increment	Accent Saturation	Border Thickness	Save
<input type="range" value="1,2"/> 1,2 ratio	<input type="range" value="1,2"/> 1,2 ratio	<input type="range" value="30,0"/> 30,0 %	<input type="range" value="2,0"/> 2,0 px	
Text Font	Widget Frame	Accent Lightness		
<input type="text" value="Roboto (sans-serif)"/>	<input type="range" value="0,6"/> 0,6 em	<input type="range" value="50,0"/> 50,0 %		
	Button Proportion	Gray Saturation		
	<input type="range" value="1,5"/> 1,5 ratio	<input type="range" value="30,0"/> 30,0 %		

- Support more branding capabilities for the components to match the webpage it will be used on
- Can be channel specific

Easily embeddable – video!



- Composable: position the components at will on any webpage
- No coding skills required
- Modern web technologies (JSON and REACT) ensures compatibility with web publishing platforms and digital commerce platforms
- Adjust visual appearance (and other settings) in the Sales Channel in Tacton Administration - > Immediately updated

Product Selector: Easy to find the right starting point

The screenshot shows the FORKLIFT INC website's Product Selector. At the top, there is a navigation bar with the company logo and links for PRODUCTS, FIND A DEALER, PRODUCT SUPPORT, MY ACCOUNT, and MY CART. Below this is the 'PRODUCT SELECTOR' section, which includes a sub-header and a 'SHOW 54 RECOMMENDATIONS' button. A sidebar on the left lists filter categories: Branding, Application (selected), Tasks, Load, Environment, and Recommended Models. The main content area is titled 'APPLICATION' and features four industry icons: Food and Beverage, Industrials, Logistics (selected), and Retail & Durable Goods. Below the industry selection, there are three recommendation criteria sliders: 'Shorter lead time', 'Higher load capacity', and 'Lower Carbon Footprint'. At the bottom of the interface, there are buttons for 'EXIT SELECTOR', 'RESET SELECTIONS', 'BRANDING', and 'TASKS'.

If your online catalog contains hundreds of configurable products, the **Product Selector** makes it easy for your customer to find the right one to start configuring

Future Capabilities: Channel Analytics

Channel NN

Sales Insights



Quote velocity



Win-Loss analysis



Abandoned self-service carts



Margins and price positioning



Sales rep ramp-up time



DSR interactions

Product & Supply chain insights



Change orders



ETOs



Product-Market Fit



Production forecasting

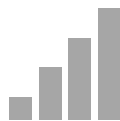


Parts reduction analysis

Usage



Logins



#Carts



#configurations

Actionable insights about sales channel performance

Unique data from CPQ - not found in other enterprise systems

Future Capabilities: Digital sales room / channel switching

Existing Customer Self-Service

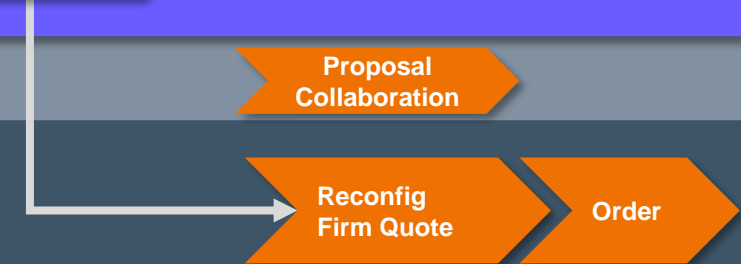
Self-service Sales channel

End Customer
Sales Partner



Direct Sales channel

Sales staff / support



Composable Customer Self-Service

Self-service Sales channel

End Customer
Sales Partner

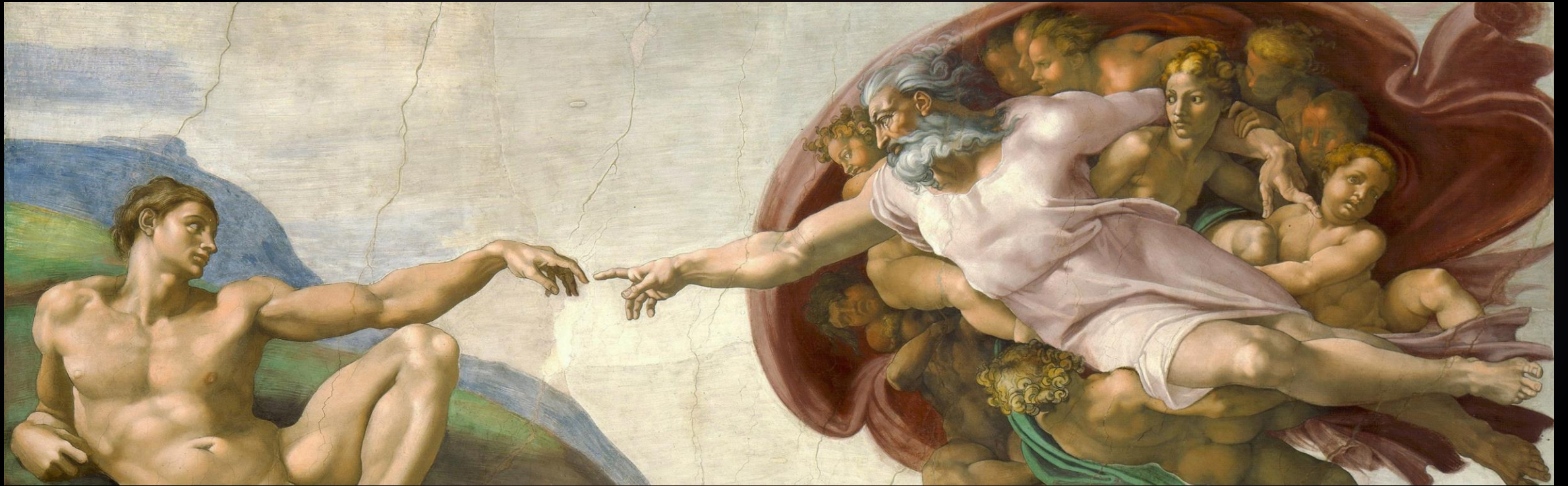


Direct Sales channel

Sales staff / support ★



Reach out!



Tacton CPQ Omnichannel Sales customers



<https://www.tacton.com/products/tacton-cpq/omnichannel-sales/?wvideo=xpxk3p8lwa>

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The divide between B2B buyers and sellers

Buyer Expectations

Digital buying journey

Self-service

Immediacy

Value-based

Accuracy

Reliability



Seller Sales Execution

Analog/physical sales

Reliance on direct/partner only

Slow response times, especially for customizable products

Unable to explain the value of product features

Inconsistent product and pricing across buying journey and channels

Overselling

Closing

Tacton Summit 2024