

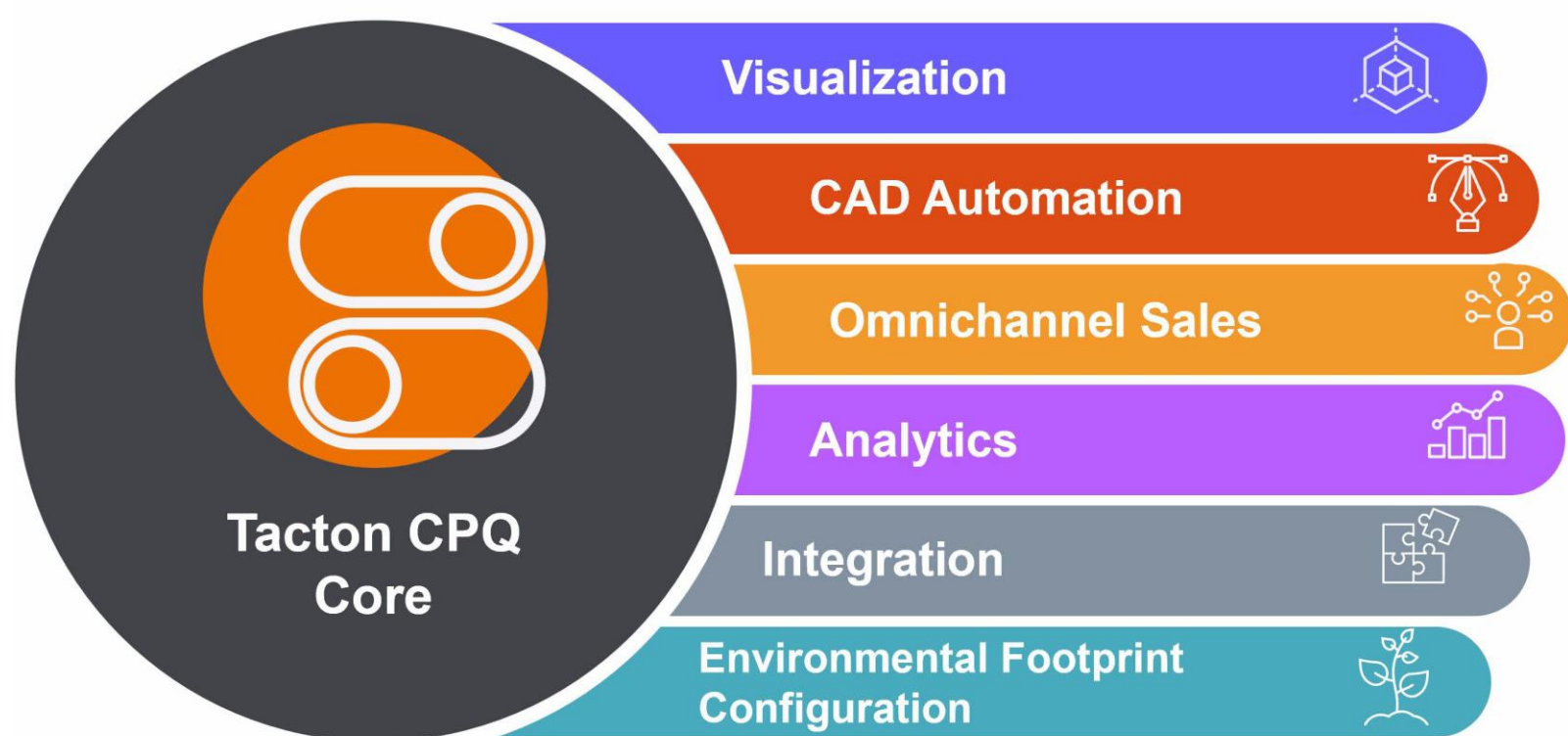


Tacton CPQ (SaaS)

Editions & Options

How to choose the right Tacton CPQ for your business needs.

Start small and scale up, or support your entire enterprise today.



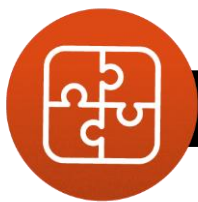
Tacton CPQ (SaaS): Editions & Options

Start with selecting an edition. Then extend your Tacton CPQ Core with options suitable for your business needs. Contact Tacton Sales for prices.



Tacton CPQ Core

	Editions:	Starter	Enterprise	Enterprise+
<i>Standard CPQ Features</i>		✓	✓	✓
<i>Subscription Pricing</i>		-	\$	✓
<i>System Configuration</i>		-	✓	✓
<i>Custom Roles & Organizations</i>		-	✓	✓
<i>Additional Front-end Environment</i>		\$	\$	\$
<i>Additional Tenant</i>		\$	\$	\$
<i>Mass Configuration Management</i>		\$	\$	✓
<i>Service Sales</i>		-	\$	✓



Integrations

<i>Standard REST APIs</i>		✓	✓	✓
<i>Connect to Anything</i>		\$	\$	\$
<i>Data Import Automation</i>		-	\$	\$
<i>Integration to Salesforce</i>		✓	✓	✓
<i>Integration to Microsoft Dynamics</i>		✓	✓	✓



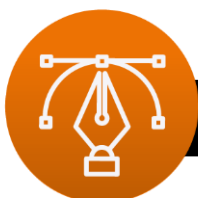
Analytics

		\$	\$	\$
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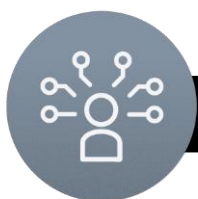
Visual Configuration

<i>Visualization</i>		\$	\$	✓
<i>Layout Planning</i>		-	\$	✓



CAD Automation

		\$	\$	✓
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OmniChannel Sales

<i>API for Lead Generation</i>		\$	\$	\$
<i>API for Self-Service</i>		-	\$	\$
<i>External Users</i>		-	\$	\$



Environmental Footprint Configuration

		\$	\$	✓
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Included in the license fee



Available at additional charge

- Not available in this edition



What do I get?

- SaaS Hosting (EU / NA)
- 2 Tacton CPQ tenants
 - Production: 1 Administration + 2 Front-end/ Connected Environments
 - Early Access: 1 Administration + 1 Front-end/ Connected Environment
- Regular product releases directly available in your Tacton CPQ SaaS environments (<https://www.tacton.com/products/product-updates/>)
- Tacton Product Support, Help Center and Tacton Community
- ISO/IEC 27001, ISO/IEC 27002, GDPR compliant

How Do I Access It?

- Standard browsers
- Authentication Methods (Basic Auth (2FA app), OpenID, SAML, Oauth, API Key)

Tacton Administration

- Collaborate effectively in global teams with tickets, QA and release tools
- Customize administrator permission roles for different types of logic and data
- Desktop Connector – edit Admin data in MS Office applications

Sales Channels

- Flexible account to proposal object model, workflows, and layouts.
- Standard and custom CPQ objects and attributes
- Use baseline Roles and Organizational tree to define governance rules for objects (read/write) and workflows
- Localization, translation, branding, and languages
- Dashboards, emails, and notifications
- Copy, import, and reuse previous solutions
- Offer alternative configurations in the same solution
 - Line item management (reorder, hierarchy)
- Update mechanisms to assist users in always using the latest product models and pricing data
- iOS apps for Tacton CPQ and Approvals
- User management

System Configuration

Offer multiple configurable products interconnected into a single system. Customize how your interconnected configurable products should behave and be experienced. Confidently offer large system configurations while maintaining high performance and seamless sales experience.

Trusted Configuration and Product Catalog

- Best-of-breed methodology and constraints-based configurator for digitally modeling high-variance products (with Product Modeling or TC Studio)
- Define any number of configurable products and their configuration interfaces
- Use needs and sizing to drive default configuration parameters
- Define sales BoM structure
- Product catalog of configurable and non-configurable products
- Configuration templates: Allow sales rep to save successful configuration starting points and share them with the organization.
- Upsell accessories effectively with Options Management or Module Variant Catalog, and ensure that offered accessories are compatible with the configured product configuration
- Use any unit of measure in configurator, BOM or documents – and translate seamlessly between them
- Configuration find: quickly find questions and alternatives in a large configuration

Costing and Pricing

- Build your price waterfall with our advanced price modeling tools. Design cost-plus, list based or any other price strategy for your products.
- Define automatic (context based) and manual discounts & adjustments
- Margin control
- Connect cost elements with module variants to calculate margins for every configuration.
- Connect your price model with role permissions, workflow, and approvals.
- Delta pricing in configurator: show incremental prices before making a configurator selection

Quoting and Document Generation

- Build document templates in Microsoft Word, Microsoft Excel, or our own web-based editor and connect them with attributes and data in the account to proposal workflow.
- Generate accurate proposals and other supporting sales documents every time with our document generation tools.
- Share and collaborate generated documents with your customers through our proposal collaboration portal.
- Decompose your orders into smaller chunks and spread them out over time (aka Split Runs)

Approvals

- Default and customizable workflows for Engineer-To-Order and Business approvals
- BoM editor + Solution BoM editor



Tacton CPQ Core Options

Subscription Pricing

Create time-based service subscriptions within CPQ. Offer service contracts based on specific product configurations, combining one-time, recurring and usage-based service charges.

Mass Configuration Management

Enable end-users to import and configure multiple products on a solution without having to open them one-by-one.

Custom Roles & Organizations

Permissions to read and edit transactional data is governed through Roles and Organizations. Standard CPQ includes some baseline Roles and Organizations. This option enables you to customize those according to your business needs.

Additional Tenant

Access to one additional CPQ tenant, including 1 Tacton Administration environment and 2 Front-end/Connected environments (1 Production and 1 Early Access).

Additional Front-end Environment

Access to one additional Tacton CPQ Front-end environment to your existing Tacton Administration. Can be used for end-user education or integration testing.

Service Sales

Pull in your installed base data into Tacton CPQ and customize the service offer for each customer asset, including tasks, intervals and resources needed. Based service offer on past and forecasted equipment usage. With clear and transparent service costs, the sales rep can define a customer net price to secure a profitable quote margin – in any currency. Create service quotes with a click of a button, and when the deal is closed, send the order directly into your downstream systems.



Integrations

Standard REST APIs

Powerful APIs to access and manage data in both Front-end/Connected environments (e.g. API for Direct Sales) and Tacton Administration (e.g. API for Administration).

Connect to Anything

No-code integration platform allowing business users to create automated workflows to/from Tacton CPQ without extensive programming knowledge. Out-of-the box connectors to more than 600 enterprise applications – or build your own connector for your enterprise application, database, and service. Pre-built "recipes" for common integration workflows, making automation faster and more efficient. Powered by Workato.

Data Import Automation

Boost your integrations to other enterprise systems by continuously importing, validating and releasing master data directly to the front-end environment. Suitable for volatile master data, e.g. currency, costs and product data.

Integration to Salesforce

Seamlessly embed Tacton CPQ in your Salesforce Sales/Community Cloud, and use Tacton-hosted integration trampolines to define and automate the data flows between Tacton and Salesforce. Your sales reps do not need to login to Tacton CPQ but can run the complete deal from within Salesforce.

Integration to Microsoft Dynamics 365

Customizable integration between Tacton CPQ and Dynamics 365. Use Tacton-hosted integration trampolines to define and automate the data flows between Tacton and Salesforce.



Analytics

API for Analytics

Extract transactional CPQ data from a Tacton CPQ Front-end Environment via a dedicated API. The retrieved data can be used in 3rd party analytics and BI tools as an external data source or stored in an external data layer.

Product Variance Insights

Analyze the variability of your product models with variance insight reports. The report can be viewed, retrieved from the API and exported in Excel format.



Visual Configuration

Visualization

Display a 3D real-time visualization of the configured product within the whole fidelity spectrum from technical to photorealistic and create an engaging configuration experience. This option also includes support for an Augmented Reality (AR) representation of the configuration using an iOS app or WebXR compatible browser

Layout Planning

Display a 3D real-time visualization of the configured product and empower users to interact with the visualization via drag & drop to support geometrical configuration use cases like visual layouts of equipment and systems. This option also includes support for an Augmented Reality (AR) representation of the configuration using an iOS app or WebXR compatible browser



CAD Automation

Empower your sales reps (in Tacton CPQ) or end-customers (via API for Self-service) to generate 2D and 3D CAD drawings based on a configured product, directly from the web browser. Sales reps can then share the CAD files and documents via Proposal Collaboration. Available for SOLIDWORKS, Autodesk Inventor and PTC Creo.



Omnichannel Sales

External Users

Empower partners and resellers with access to your CPQ in the same way as direct sales internal users.

Lead Generation

Bring the product configurator to your external webpage or eCommerce and allow anonymous prospects to explore your full product variance on their own. Captured leads are then shown in Tacton CPQ where sales rep can convert them to Opportunities. Lead Gen UI provided and owned by customer.

Self-service

Bring product catalogs, configuration, pricing, document generation, Visual Configuration*, and CAD automation* to your end customers or partners directly on to your website or eCommerce system. Created shopping carts can then be checked out directly or be routed via order/sales support inside Tacton CPQ. Self-service UI and payment solutions provided and owned by customer.

**Requires Visual Configuration option.*

**Requires CAD Automation option.*



Environmental Footprint Configuration

With Tacton CPQ Environmental Footprint Configuration, you automate and scale the climate impact calculations of your sold products, creating carbon transparency to your customers, your company, and to legislators and investors.

Instant and full footprint calculation for every configurator selection. Optimize whole solution on lowest footprint. Make the product footprint available in quotes and reports. Integrates with major Life-Cycle Assessment vendors, such as SimaPro.



Tacton is a leading SaaS company trusted by global manufacturers. Tacton Trusted Configuration simplifies sales for manufacturers of complex products. Tacton's Configure Price Quote software is named a Leader by Gartner in the Magic Quadrant for CPQ Application Suites and is recognized for its advanced product configuration and visualization capabilities. Tacton's founders pioneered computer-based product configuration which today powers Tacton CPQ and CAD Design Automation. Since 1998, Tacton is trusted by global customers such as ABB, Daimler, MAN, Scania, Siemens, Xylem, and Yaskawa. It is co-headquartered in Chicago and Stockholm, with regional offices in Karlsruhe, Warsaw, and Tokyo.

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