



Integration Layer Concept: Accelerate your Time-to-Value for CPQ Projects

A CPQ quote is based on data that may reside in several different systems, like prices in ERP, modules in PLM and customers in CRM. Tacton CPQ is typically used integrated with existing business applications - eliminating the need for duplicate data entry, reducing manual order errors and accelerating the quote to order process.

It's essential to connect business data to Tacton CPQ automatically for a seamless push and pull to ensure that quotes are always correct and up to date. In addition, data needs to be delivered from Tacton CPQ to other systems, like orders to your ordering system.

The Integration Layer Concept enables efficient projects with agile changes by linking Tacton CPQ to leading ERP, CRM and PLM systems. Customizations are set up and configured within the layer, requiring very few changes to either Tacton CPQ or your business application counterpart.

INTEGRATION TOUCHPOINTS

When integrating to Tacton CPQ, there are typically three types of data integrations: master data, transactional data, and real-time queries. Your companies' business processes determine the specific integration type required for your organization.

Master data integration

Your CPQ should be able to make master data available to your sales team, without the risk of data replication and maintenance in different systems. The Integration Layer Concept enables you to use the data in sales opportunities as soon as it is created in other business applications.

Master data integration allows for sharing existing sets of business data across the enterprise, including:

- Customers and price lists: Enable customer-specific prices in your custom quotes.
- Sales organizations and product catalogs: Set up sales organizations such as partners or local markets so they

can sell the right products

- Currencies and exchange rates: Use different currencies maintained in external systems to generate quotes.
- Non-configurable products: Include both configurable and non-configurable products in your quotes.

Transactional data integration

Your CPQ should be able to send transactional data and make it available to other systems. With transactional data integration, you won't need to manually enter information in these other systems.

Transactional data integration enables newly created business objects to be sent automatically, including:

- Orders: Send an order created in CPQ to your manufacturing system for production.
- Sales documents: Send sales documents to your Service departments.
- Business Intelligence data: Send CPQ results to Business Intelligence systems for further analysis.

Real-time query integration

Your CPQ should be able to make real-time queries to other systems. With real-time query integration, your users won't need to open additional systems to verify the status of different items.

Real-time queries allow the users to verify the status for relevant items, including:

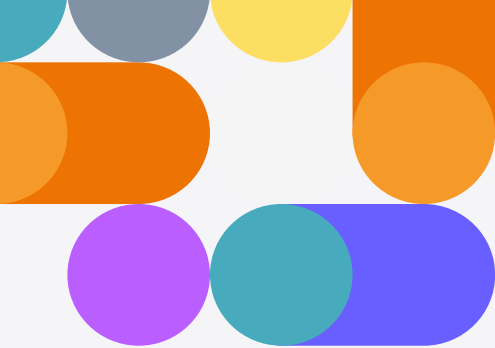
- Availability-to-promise queries: Users can work in Tacton CPQ, and verify delivery times for quotes.

Tacton CPQ

Events - Tacton CPQ is able to fire events, which are connected to operations or defined to trigger transitions between different workflow states.

Operations - Tacton CPQ has a number of predefined actions that can be used in a handler.

Transitions - Each object type in Tacton CPQ can have a



workflow set up. A workflow contains a number of defined states and the possible transitions between these states. A transition can be used in a handler to publish information.

Handlers - The events can be managed by defining a handler within Tacton CPQ that will define where to publish the data and what data to send.

Tacton Object API - Tacton CPQ provides a repository pattern API allowing external applications to query, create or update objects.

Integration Layer Concept

Message - The unit of information that is passed between the systems.

Driver - Abstract concept to configure a connection between Tacton CPQ or counterpart, and a connector in the integration layer.

Tacton CPQ Connector - A connection between Tacton CPQ API and the integration layer.

Route - Object in the integration layer that determines the destination of a message, either the Queue or the Connector. The customer implementation defines the routes needed. Is able to handle transactional messages.

Transformer - Optional object for managing processing or transformations of the Message in a Route. In this step, the transformation between data formats is executed, e.g. split, join, compress or encrypt.

Queue - Intermediate object in the integration layer that manages transactions between different Routes. The integration layer will contain several queues with different purposes. The exact queues implemented depends on routes in customer implementation. Manages buffering and batch jobs.

Monitoring - Monitoring of the message broker.

Security - Multiple security options such as Route security, payload (message) security, endpoint security and configuration security.

Counterpart Connector – The connector between counterpart and the integration layer. In customer implementation, this is set up for each counterpart.

COUNTERPART

System (e.g. CRM, PLM or ERP) connected to Tacton CPQ.