










FACTSHEET

# camos CPQ 365

Create offers that excite your customers.  
Configure, Price, Quote for multi-variant products.

camos.

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## Overview

### Overview of camos CPQ 365

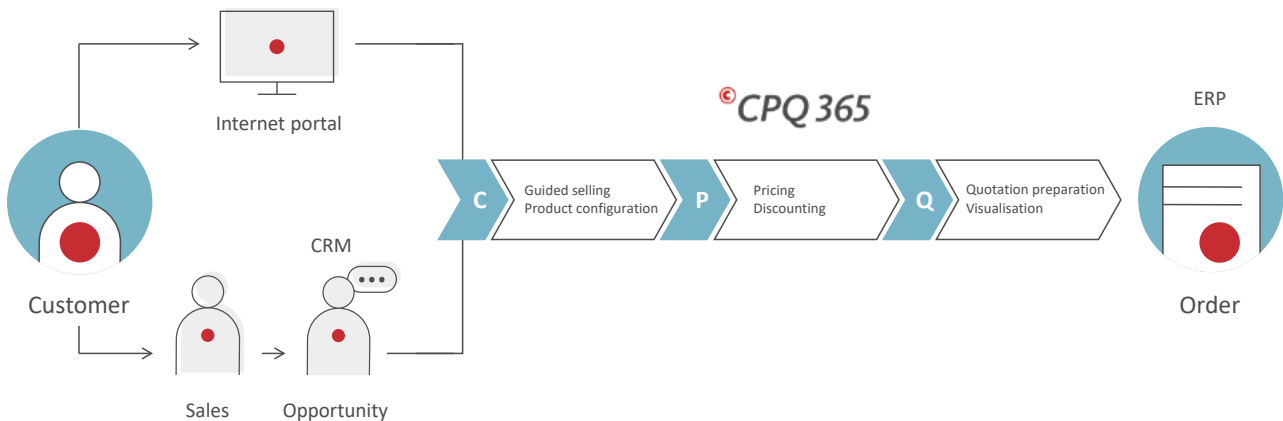
camos CPQ 365 (Configure, Price, Quote) is one of the leading CPQ solutions for digitalising the distribution of products with a wide range of variants. The software precisely configures products according to the customers' requirements (configure), calculates prices reliably (price), and creates personalised offers (quote). camos CPQ 365 offers customer-specific products as reliably, quickly, and in as much detail as you can normally do with standard products.

### Who benefits from camos CPQ 365?

camos CPQ 365 is developed for medium to large scale companies that sell complex products and services – for example in mechanical and plant engineering. Companies that want to sell products online and require a lot of consultation also benefit from the solution.

### CPQ application for omnichannel sales

The cloud software camos CPQ 365 (on-premise installation also possible) offers all the functions that are required in sales to create complete offers. The sales process is automated with sales-relevant product and offer knowledge provided centrally. The software can also be operated on mobile devices. Sales staff and retailers are optimally supported. camos CPQ 365 can also be used as a headless solution. The decisive advantage: companies can very easily add CPQ functions to existing environments such as websites or web shops. In this case, the CPQ software works separately from the graphical user interface and carries out product configuration and pricing, for example, in the background.



camos CPQ 365 has its place in the overall process between an opportunity in the CRM system and an order in the ERP system. The software communicates via standard APIs with other associated systems, such as ERP, CRM, CAD, PLM or BI systems. This automates the entire process from initial creation of an offer to entering the order in the ERP system.

CPQ systems are becoming increasingly important for lead generation. This is achieved by integrating camos CPQ 365 into internet portals. During the customer's journey they will receive compelling product information, to include budget offers that are tailored to their specific requirements. They thus become enthused by the product without the need for personal contact. The information obtained flows seamlessly into the further sales process.





## Quote

The third essential component of the software is offer drafting. This supports the sales department in automatically displaying configurations and prices in binding and persuasive offers. The draft is structured rapidly, without errors, in an sleek, attractive design. The offers can be created in other languages, regardless of the dialogue language. The offer is created as a PDF and can be sent immediately in an email.

In addition to the binding offer, other documents can be defined and handed out. (E.g. technical specifications, price overviews or short offers.)

In the camos Document Designer the layout of the offers and other output documents is adapted to company-specific requirements. The layout and formatting function of the Document Designer are familiar with Microsoft

Word and can be used to design the offers.

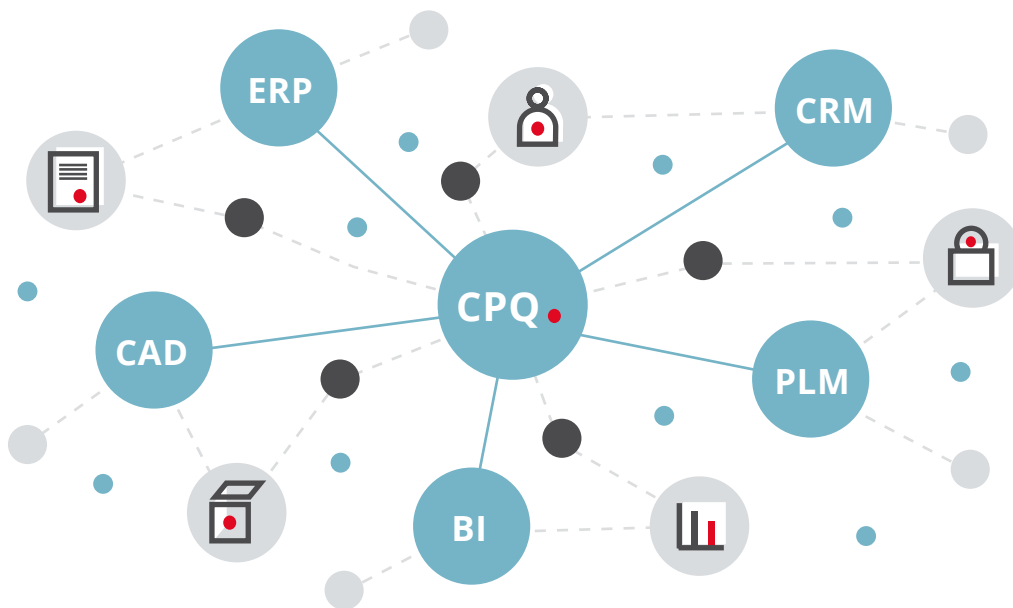


*Offers in company design.*

## camos CPQ 365 with seamless integration

camos CPQ 365 is the digital bridge between the customer and production. The software integrates the customer into the sales process and provides the information for production. By putting the consumer at the center, camos CPQ 365 enables the growing demand for individualized

products to be handled seamlessly as an online self-service solution, in addition to the B2B environment. With camos ConnectCRM and camos ConnectSAP, camos supplies standardised integration modules for most CRM systems and the SAP ERP systems.



## Functional highlights

Functions	Descriptions
Guided needs analysis (guided selling)	Specific questions about the customer's needs lead to optimally selected and preconfigured products.
Budget quote in self-service	Following the guided needs analysis, prospective customers receive initial suggestions for suitable product variants and an approximate price indication in the form of a budget offer, which can then be worked out in detail with the prospective customer.
Flexible configuration	Special requests and customisations can be easily made during configuration.
Free positions	Quotation items can be added manually without any configuration logic.
Optional and alternative items	Optional items can be specified. In addition, offers can contain one or more alternatives to their items. This allows prospective customers to choose the variant that best suits their requirements.
Plausibility and completeness checks	The set of rules ensures that the configured variant is always technically feasible and complete.
Explanation of rule violations	Reasons for non-permissible configurations and recommended changes are displayed.
3D product visualisation	Continuous 3D visualisations of the product configuration.
Audit capability	Actions performed and values entered by users are traceable.
Green configuration	The product carbon footprint is determined and reported at the same time as the configuration.
Rule-based product configuration	Predefined rules to avoid errors and increase efficiency.
AI configuration recommendations	Recommendations for configuration decisions that match customer requirements.



P	Flexible calculation basis	Calculations can be made according to different price lists or on the basis of manufacturing costs.
	Extensive discount options	Individual items or entire item groups can be discounted. In the case of manual price adjustment, a discount is calculated at the level of individual items.
	Subtotals freely available	The total or subtotal can be calculated at any level.
	Intercompany pricing	Cross-plant offers can be created with intercompany pricing.
	Approval workflows	If defined criteria (e.g. discount amount) for an offer are met, decision-makers are informed and give their final approval.
	Flexible adjustment of the calculation Subscription pricing	Products and services can be offered on a usage basis or for a defined period with regular billing.
	Automated price calculation	Prices are calculated simultaneously with the configuration of the products.
	AI-based discount suggestions	Recommendations for discounts with the highest probability of closing.
Feature Based Pricing	Enables a value bases approach to pricing.	
Q	Customisable layout	Offer documents can be perfectly matched to the corporate design.
	Sustainability information	The environmental impact of the product (e.g. product carbon footprint) can be shown in the offer document.
	Offer or customer-specific customisable text modules or texts	Text modules of the quotation as well as texts for items can be stored in the master data and used without errors as well as customised for an individual quotation
	Versioning offers	Any number of versions with optional items and alternatives can be created for each offer.
	Multilingual offer printing	Documents can be generated in any language, taking into account country-specific formatting, and sent to the prospective customer by e-mail.
	Clear comparison of offers	Offer comparison highlights differences in a table.
	Automated quotation generation	Results from configuration and pricing are automatically combined in a quotation.

## The advantages of camos CPQ 365



### Ahead of the competition

Consistent information and data flows between CPQ, CRM, ERP and CAD systems to improve the quality of your offers and shorten process times. There is no longer a need for time-consuming routine activities or for interfaces to be coordinated. The customer quickly receives an informative and error-free offer.



### More sales & profit

The highly efficient sales process, optimal pricing and targeted cross-selling and upselling increase competitiveness, sales and profit. Modularization of the product reduces manufacturing costs and avoids the need to generate special designs. Furthermore, it limits the implementation of subsequent changes.



### Adaptability

Above all, adaptability to customer-specific requirements and high interoperability are unique selling points.



### Optimal customer experience

The visual impression of the configured product inspires the customer, reinforcing their product choice.



### 100% price and cost transparency

Transparency and equitability are held to the highest standard at every point of the offer process. From the cradle to the grave, prices, calculated costs, and offers, are transparent.



### New leads through self-service

With CPQ software, your customers can configure products online in a self-service process. This ensures new leads at an early stage of the customer's journey.



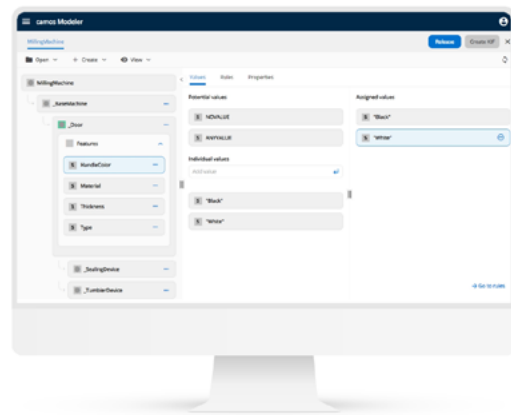
## Modelling without any programming knowledge

All modern CPQ systems are essentially based on intelligent product models that contain the configuration rules. CPQ systems differ significantly in this regard. When it comes to modelling, usability, clarity, functionality, and the reproducible product complexity are important factors for the performance of the product configurator. The camos CPQ 365 modelling tools minimize the effort involved in creating and maintaining product models.

The camos modelling tools are designed to build the entire basis for a powerful configuration without any programming knowledge. Modular structures, consistent use of object-oriented principles, AI-based rules, and integrated master data management are important function modules. However, tools for designing the user interfaces and the result layouts also form part of the camos solution. Moreover, it includes tools for testing, translation, deployment, and version management.

### camos Develop and Modeler

- Object-oriented modelling environment.
- Development and maintenance of product and relationship knowledge without any programming knowledge.
- Modular mapping of even very complex product structures.
- Working in parallel in the case of comprehensive product models.

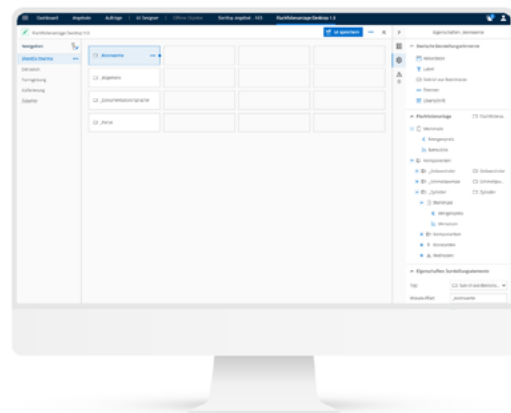


Product structure in the camos Modeler.

With camos Develop, the existing functionality of the CPQ solution can be adapted and functionally expanded. camos Develop offers its own fully integrated high-level programming language for this. This is used to program extensions to the application. The customer-specific extensions and adjustments are almost limitless.

### camos UI Designer

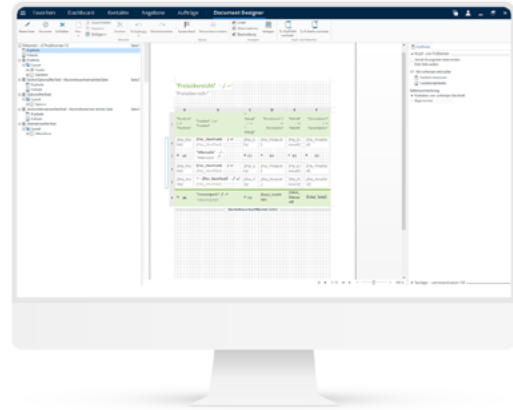
- Development of modern user interfaces (UIs) for the product configurator can be used without any programming knowledge.
- Reusable UI elements enable a uniform appearance within the application – even on different end devices.



Building UIs with the camos UI Designer.

## camos Document Designer

- Simple creation of offer templates thanks to the modular structure.
- Content and design definition without programming.
- Corporate design taken into account.
- Perfect representation of the configured solution.



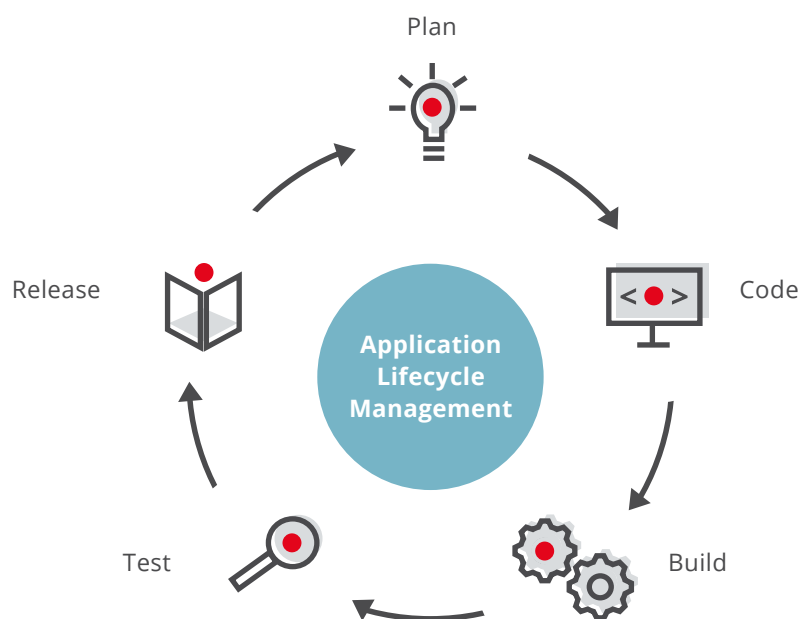
Creating offer templates with the camos Document Designer.

## Application Lifecycle Management

Once the modelling for a product or component is complete, it is automatically transported to a test environment with camos Transport and, after approval, to the productive environment. The new product knowledge base, including a user interface in corporate design, is available for all defined end devices and the appropriate offer layout in the CPQ solution. All releases are clearly managed in an integrated project and version management. Changes within a product model are documented in a ticket system and form the basis for long-term maintenance and further development.

## Internationalisation capability

The international use of camos CPQ 365 is optimally supported by integrated tools. camos Translate enables translation into various dialogue languages. Relevant texts can be exported with this tool and translated in a convenient management environment. If necessary, the internationalization capability can easily translate in several languages simultaneously at different locations. Country-specific units of measurement and currencies are also easy to use in camos CPQ 365. You gain valuable time and flexibility.

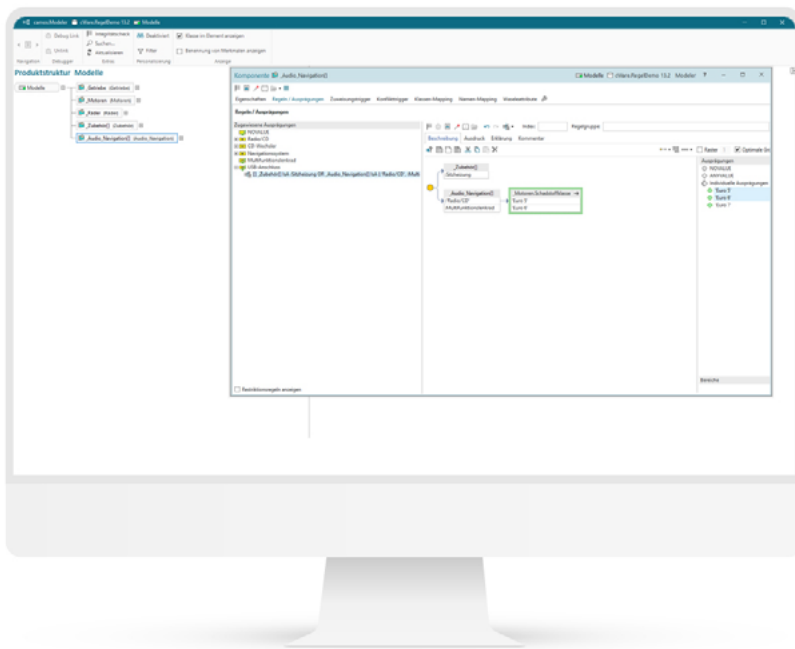


## The special configuration approach

With the camos AI-based expert system approach, the wide range of possible variants does not have to be created in advance. The individual and technically feasible product is created step by step in the configuration process, taking the stored rules into account. The configuration model contains data about the possible products, components, characteristics, and configuration rules. The rules decide which components, features and characteristics are (still) possible. These are then either automatically assigned by the system or selected by the user.

Since the configuration is carried out step by step, this model also works with very large system and plant configurations. This type of configuration also allows free positions that are not provided in the configurator but

are necessary due to a customer request to be inserted manually at any point. It is essential to be able to use free positions, particularly in engineer to order (ETO). Most other CPQ systems use a variant management approach. All possible variants, (i.e. all possible combinations of functions and characteristics), are thereby shown in tabular form. A suitable variant is then selected during the configuration process, or suggested according to the customer's requirements. In machine and plant engineering, however, the variant management approach described above comes up against its limits because not all variants can be defined in advance in a closed modular system. Customer requirements that deviate from the standard and must be clarified in engineering must regularly be taken into account.



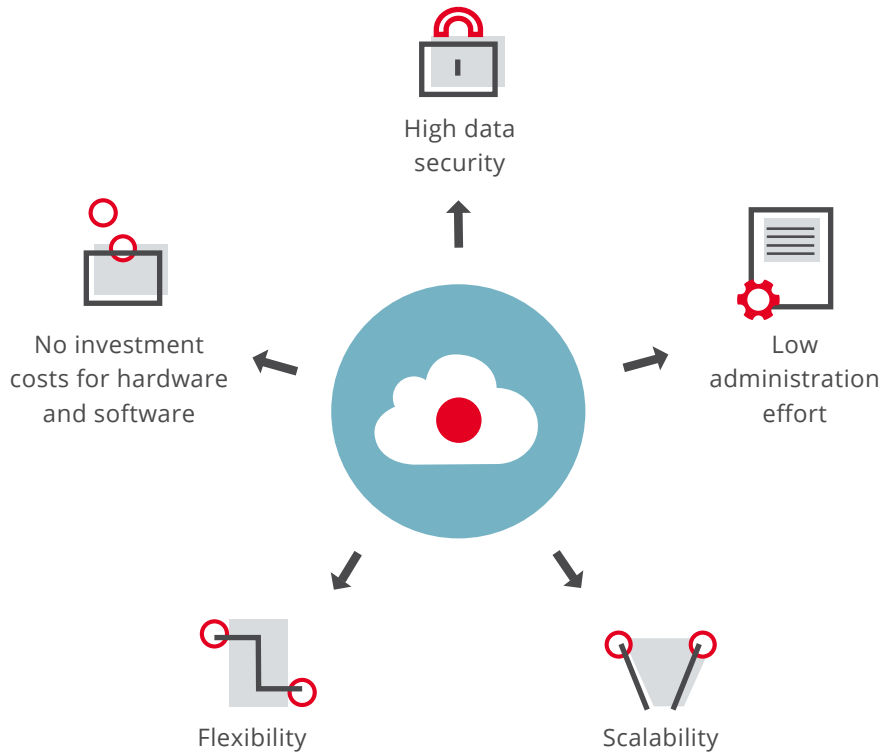
*The technically feasible product is created step by step, taking the rules into account.*

## camos CPQ 365 in the cloud

camos CPQ 365 can be used on-premise or as a cloud solution. Sales benefit equally from both solutions. camos CPQ 365 provides the required mobility thanks to its availability online. Sales representatives and dealers always have real-time information at their fingertips, wherever they may be.

Even prospective customers have online access to the digital sales system, and thus all the sales information. Consumers can simply configure their own custom product and initiate the order process themselves. The

camos cloud solution offers a complete infrastructure, software, and services solution from a single source. A special feature of camos CPQ 365 in the cloud is that the solution can also be integrated with customer-specific sales processes and used in the respective IT landscape. Every company receives a solution and an optimised IT infrastructure tailored to its requirements, without foregoing the advantages of the cloud. Therefore, camos cloud solution offers all the advantages of a SaaS solution with unlimited customising options and the high data security of an on-premise solution.



camos CPQ 365 in the Cloud is therefore ideally suited for the sale of complex B2B products. Convincing offers can be generated and approval workflows automated, even for non-standardised, customer-specific machines and systems (engineer-to-order).

camos CPQ 365 is hosted by our hosting partners exclusively in certified German data centres or, on request, internationally. A separate database and application instance are provided for each customer. This guarantees the highest level of security for the stored data as well as permanently high availability and performance.

## The facts about camos speak for themselves

- Over 200 camos customers in 15 years: leading provider for B2B companies in Europe.
- One of the leading CPQ solutions for the B2B market for the past 15 years.
- Notable customers with technically complex products such as Siemens, KONE, Festo or DMG Mori use the software worldwide.
- camos 'takes its customers by the hand' and supports them from the consultation phase during implementation to personal support and update execution.

### More than 200 customers rely on camos

200 international customers benefit from the wide range of functions of the camos standard solution and its high adaptability to individual requirements. They especially appreciate the solution's flexibility in modelling products, designing interfaces and integration into the IT system landscape. The customisation possibilities distinguish the camos solution from other CPQ systems.



**HAVER & BOECKER**

“ Today, employees prepare an offer in three hours. In the past, this could take up to two days for extensive enquiries.

*Ann-Kristin Kaltefleiter-Jürgens, Head of Sales*



**Schindler**

“ With the software from camos, we have not only realised a CPQ solution with which we are currently setting the standard in our industry. It also provides us with a solid foundation for integrating digital innovations in the coming years.

*Urs Singer, Business Process Manager at Schindler IT Services AG*

## Contact us for a demo



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