



Excellent CPQ Software

Reliable, Fast and Economical

The Solution for Product Configuration, Price Calculation and Quote Generation (CPQ)

The Planware software offers medium-sized and large companies everything they need for product configuration, price calculation and quote generation. Sales staff and customers can use Planware CPQ to quickly and easily configure even the most complex products themselves. With over 30 years of experience, Planware is one of the most renowned companies for CPQ solutions in Europe.

**CPQ Software
for Varied and
Complex Products**





Planware CPQ is a highly flexible, powerful product and quote configurator for suppliers of capital goods (B2B).

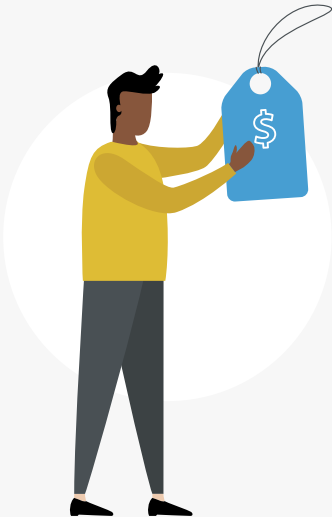
The system automatically calculates the correct price and generates a quote. The definition options fulfill all the requirements of variant manufacturers, contract manufacturers and commercial enterprises with functional characteristics. This ensures enormous time and cost savings as well as a perfect user experience.

An Overview of the CPQ System

- High-performance product configurator
- Reliable price calculation
- Efficient, automatic quote generation
- Excellent user experience for employees and customers
- Usage in a browser, can be used from everywhere
- Flexible adaptation to customer-specific requirements possible
- Simple integration, e.g., customer data can be taken from a CRM system or product data from ERP and PIM systems
- Highest security standards and scalability, all compliance requirements can be met (e.g., GDPR)
- Multilingual
- Guided selling, cross-selling and upselling, product finder, integration in channel portals and much more

What We Offer

- Configuration solutions on the basis of a standard product
- Individual modifications and software development
- Integration of the software into the customer's system landscape, such as ERP and CRM systems
- Consultation, software roll-out, maintenance and operation
- 30 years' know-how in the area of product configuration and variant management



Advantages of Planware CPQ



Increase Sales

- Securing competitive advantages
- Functions for cross-selling and upselling
- Optimal product portfolio and product variety presentation
- Gain a deep understanding of customers' wants and needs
- Channel portals as an additional source of revenue



Save Time and Costs

- Fast configuration, automatic price calculation and quote generation
- Time savings for sales staff
- Fewer resources required
- Fast training of new employees
- Customers require less support



Improve the Quality of the User Experience

- Even without prior knowledge, customers can configure products themselves
- Guided selling supports customers in the configuration and decision-making processes
- Products can be better tailored to customers' needs
- Customers gain more product knowledge
- Individualized products can be ordered directly



Minimize Risks

- No more pricing or quotation errors
- Impossible product configurations cannot be sold
- Product knowledge no longer tied to individual employees
- All compliance requirements met, including GDPR
- Highest security standards

Application Scenarios



Product Configuration and Quote Generation

The configuration of products and the automatic generation of quotes and bills of material are the classic use cases of CPQ software. With Planware's standard functions, users can find the optimal configuration with just a few clicks, even with a complex and extensive product structure.

Your sales staff use Planware as an expert system that provides them with all configuration options, taking dependency rules and exclusions into account. As all variants and object dependencies for parts, components and service modules are stored in the system, even less experienced employees can work with the software. At the touch of a button, the customer can get a correct quote in any language and in a layout in accordance with your corporate identity. Special, company-specific requirements can also be quickly implemented with Planware.



Product Finder

When customers search for products on a company website, they often have to use a hierarchical search for product groups and categories. To do this, they usually need prior knowledge about the products. When using Planware as a product finder, customers easily can find what they are looking for on your website using parameters such as requirement attributes and framework conditions.



Guided Selling

With guided selling, interested parties can configure products themselves on your website, even without prior knowledge. After the customer has answered a few questions about his requirements and wishes, he automatically receives information about technical parameters, prices and delivery times. Images, 3D models and videos can also be displayed for the configured product to provide visual support. The customer can create a short offer for himself, send you an inquiry with additional requests if necessary, or order the configured product directly.



Channel Portals

Vendors and sales partners can offer configurable products via a channel portal. It can be used exclusively by registered customers, for whom additional configuration parameters and, if necessary, individual discount systems can be activated. The channel portal can be seamlessly integrated into corporate websites.



Product: Planware CPQ

Planware CPQ Server

Planware CPQ Server is a centralized platform for configuring your products and offers. The software includes an easy-to-use, web-based sales system. With it, users can manage quotations and make product selections. Calculations and quotations are generated automatically. The system also enables access to product knowledge from anywhere, allowing users, for example, to generate quotes on-site.

Modifications to the software are carried out centrally in Planware CPQ Server and updates are available immediately once released. Interfaces to databases, new browsers and operating systems are also maintained centrally on the server. This guarantees trouble-free operation, even if the system environment changes.

Different calculation methods are available to you. A simple calculation consists of plausibility checks and the addition of standard prices and expenses. A more detailed calculation incorporates country discounts and risk rates, special and transfer prices, as well as special settings.

Optional output to as well as editing and calculation in Excel and the automated return of data to the Planware software offer you the highest flexibility in setting up calculations.

Planware CPQ Product Designer

The user-friendly Planware CPQ Product Designer allows the maintenance of products, components, prices and texts as well as regulations and dependency relationships. The product portfolio and the performance components can be developed with the Designer.

Planware CPQ Developer Studio

Planware CPQ Developer Studio is the development environment in which the individual configuration applications are created. It is used to implement customer-specific design calculation, special workflows, interface design and functional requirements. The Developer Studio can also be used by customers to further develop the application independently.



Product: Planware CPQ NX

Planware CPQ NX Suite

The Planware CPQ NX Suite has a highly flexible technological basis. It provides a high-end solution for even the most complex product and quotation configuration and price calculation requirements. The required definitions of product, decision and process logic are supported by a powerful module library. These can be created entirely without programming and without the help of IT specialists. Product managers are provided with a development environment tailored to their needs for managing and storing product relationships and properties. Knowledge is thus no longer stored only in the heads of a few specialists, but can be accessed and used by all employees involved in the quotation process, as coherent product information knowledge from a common database.

Quotation configuration is fully integrated into a project database. This means that the tools are always supplied with the most up-to-date parts list data and are seamlessly integrated into the quotation creation process. In addition to configuration and costing, quotation-specific, multilingual documents – such as manuals, operating instructions, circuit diagrams and much more – can also be generated automatically.

Planware CPQ NX Designer

Defines the product, decision and process logic

- Convenient definition of the logic and flow-oriented configuration process. Rules are built up gradually and enhanced with permanent information.
- Interactive definition of configuration dialogs and input screens for the user. The inclusion of any complexity is possible.
- The configurator is provided with assemblies and structures in the integrated product database available for sales.
- The configuration process can be stored centrally in the database and then assigned individually to the products/assemblies.

Planware CPQ NX Solver

Enables the user to configure products and create quotations

- Similar to a wizard, it guides the user through the configuration steps.
- No errors in configuration or calculation.
- Corrections and alternative configurations are possible.



Advantages for Variant Manufacturers

- Easy operation and efficient product compilation through individual configuration dialogs, depending on the selected functional features
- Low production diversity
- Minimal burden on the technical department
- Controlled selection of options through the configuration of the operating conditions
- Low data volume – the entire product range does not have to be mapped, but the configurator pulls together the desired products on a project-specific basis
- Fast response times, thanks to lean and efficient data structure

Advantages for Contract Manufacturers

- Mapping of configuration sequences across the entire plant
- Object-oriented assembly configuration allows the formation of assembly systematics
- Constantly expanding knowledge, based on the mapping of special productions through a simple input process
- Reuse of configurations in later projects avoids the requirement for new designs
- Calculation schemes are individually adaptable, article prices are used automatically
- Integration of CAD, generation of quotation documents and drawings
- Mapping of product dependencies avoids personnel dependencies

Integration in ERP Systems

Almost all Planware customers use an ERP system such as SAP. It is important that data exchanges between the ERP system and the CPQ software function smoothly, in both directions and with manageable effort. Planware offers flexible connectors and integrations for this purpose, with which the software can be fully integrated into the ERP environment. Data and information from the ERP can thus be used in Planware without requiring programming, and Planware quote data is transferred directly to the ERP.

Software Development

In addition to our CPQ software, as part of the JustRelate Group we can offer companies an integrated software suite for digitalization. This includes the content management system Scrivito CMS, the customer relationship management software PisaSales CRM as well as Neoletter, a solution for marketing automation and email marketing. Thus, Planware can also be incorporated into a digital experience platform – for example, for guided selling or more complex CRM requirements.

Consultation

Thanks to a large number of projects, especially in mechanical and plant engineering, we are very familiar with the complex requirements of a wide range of industries.

Our experts advise you on product structuring, drawing up functional specifications or variant management for example, and are always on hand to provide advice. During the operational phase, each customer has his contact person who knows the customer's business inside out and can thus provide optimum support.

To this end, we provide you with experienced project consultants with whom you can define the technical framework, agree on the procedure and define possible optimizations.

If required, we can also support you in preparing your product range for mapping in the Planware software. With the experience we have gathered, we also assist you in issues of delimitation, variant formation and offer management.



Integration

None of our customers has launched our configuration software “on a greenfield”. They usually have existing ERP systems, use company-wide CRM software and have often invested a lot of time and money in developing their own design modules.

Only by integrating CPQ software into the company's IT landscape and incorporating existing software modules can the quote process be fully

supported efficiently. Duplicate data maintenance is eliminated, software that has already been developed can continue to be used, and there is continuous system use without interruption for the user.

With the open interfaces of Planware and with our project managers' know-how, ERP, CRM and PPS systems can also be quickly and practically integrated.



Maintenance and Operation

As a standard software, we carry out maintenance, develop its functions further and customize it to adapt to innovations in operating systems, databases, web browsers, etc. Our customers obtain these adaptations within the framework of software maintenance.

Questions may arise when the system is in operation, for example, whether additional standard modules are to be used or new

functions are to be released. In these cases, your personal contact person is always available. This ensures fast, reliable and competent help, which is also part of a maintenance contract.

If desired, we can also take on the operation of the software. In this situation, the web server is hosted in an external data center and is administered by us.

Planware Is Trusted by Leading Businesses



Oerlikon Barmag

“ Primarily, we have achieved consistency: all relevant data is managed in one location. With Planware the generation of quotes, especially for standard machines, has become significantly faster – by 30 % to 50 %. ”



Windmüller
& Hölscher KG

“ With Planware, we have significantly raised the quality of our quotes, both from the technical content and the commercial respects. In addition, we have been able to reduce our reaction time to customer inquiries, because Planware can make product knowledge available to all employees. ”



Wagner Group

“ With Planware, we have minimized the source of manual errors and we automatically generate correct quotes in different languages. ”



Glaston Switzerland AG

“ In the past, generating a quote took between half a day to one day. Now we can draw up a complete construction glass quote in 15 to 30 minutes – in 60 minutes at the most. ”

The JustRelate Advantage

- More than 150 highly qualified experts
- Deep understanding of marketing, sales and service
- Pioneers of the internet and web
- 250+ active enterprise customers
- 100,000+ active users
- State-of-the-art technology
- Innovative full-service stack
- Agile project realization
- Based in the heart of Europe, used worldwide

250+

Customers

Used in 50+

Countries

150+

Employees

30+

Years of Innovation

Contact



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