Oracle CPQ Cloud and the Document Designer

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CONFIGURE, PRICE, AND QUOTE CLOUD

Using the Document Designer, your organization can create, edit, and produce templates for all of the documents needed throughout the sales process. When used in conjunction with the Configuration and Commerce modules, document templates will automatically be populated with current and accurate product, pricing, customer, and sales rep data. With the Document Designer, professional, custom-branded proposals, quotes, contracts, statements of work, data sheets, letters, and other business documents are just a few clicks away.

One Click Documents for the Entire Sales Cycle

The Document Designer is an integral part of Oracle BigMachines CPQ Standard Edition Cloud Service, Oracle BigMachines CPQ Enterprise Edition Cloud Service, and Oracle BigMachines CPQ Premium Edition Cloud Service. It can be integrated with popular customer relationship management systems, which enables sales reps, channel partners, value-added resellers, and distributors to quickly populate preloaded templates and generate documents that can be printed, faxed, or sent to a customer via e-mail or through eSignature.

The Power of Dynamic Templates

The true power of the Document Designer lies in its ability to populate templates with current product, pricing, customer, and user data on demand. This means no more copying and pasting data manually into a word processor, saving your sales reps time, getting the proposal to the customer faster, and ensuring that the document is 100% accurate by eliminating human error. When product or Transaction data changes, all it takes is one click to produce a fresh, up-to-date document.

Additionally, business logic and conditions can be built directly into the Document Designer using standard functionality, meaning your document can dynamically grow, contract, or have different content based on product, pricing, or customer data.

KEY BENEFITS

- Streamline document generation and eliminate copying and pasting current data using dynamically-populated templates
- Produce consistent, professional-looking, branded documents across an entire sales organization
- Manage translations with built-in multi-language compatibility
- Create and design templates simply in an intuitive user interface
- Embed external documents within a template using standard functionality
- Allow sales reps to add custom messages to the document from within the Transaction
- Send and receive official electronic signatures using eSignature DocuSign integration to close deals faster

DOCUMENTS YOU CAN GENERATE

- Quotes
- Proposals
- Contracts
- Statements of Work
- Data Sheets
- Cover Letters
- Dynamic Terms and Conditions
- And more…

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- Dynamic tables of contents and headings
- Configuration, Commerce, and user attribute values
- Conditional content
- Looping sections
- Embedded documents
- Headers and footers
- Background images

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Oracle CPQ Cloud solutions enable both enterprise and midsize companies to streamline the entire opportunity-to-quote-to-order process, including product selection, configuration, pricing, quoting, ordering, and approval workflows.

RELATED PRODUCTS

- Oracle BigMachines CPQ Standard Edition Cloud Service
- Oracle BigMachines CPQ Enterprise Edition Cloud Service
- Oracle BigMachines CPQ Premium Edition Cloud Service
- Oracle BigMachines CPQ eCommerce Transactions Cloud Service
- Oracle BigMachines CPQ Channel Users Cloud Service
- Oracle BigMachines CPQ Data Export Cloud Service
- Oracle BigMachines Express CPQ Cloud Service for Salesforce.com

How it Works

Once a Document Designer template has been created and a Transaction is being finalized, a sales rep can produce a customer-ready document in just a few steps:

1. Select a language for the document to be generated in.
2. Click a button to generate a PDF, DOCX, or RTF copy of the document, which can be viewed and saved, attached to a CRM opportunity, emailed to the customer, or sent to the customer via eSignature, all from within the Transaction interface.

Simple Administration

The Document Designer offers an easy-to-use, intuitive drag-and-drop interface, which makes redesigning, rearranging, or modifying a template quick and simple.
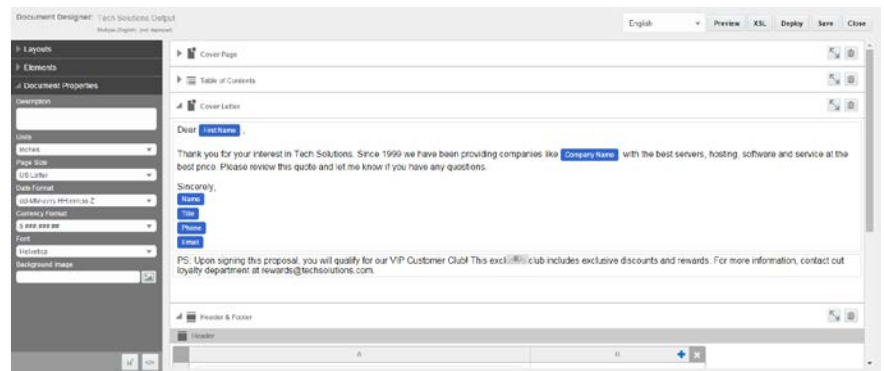

Figure 1. The Document Designer's intuitive drag-and-drop interface allows new admins to quickly familiarize themselves with admin and design tasks.

Years of Built-in Experience

The Document Designer builds on and perfects what CPQ Cloud's previous document-generation tool started. CPQ Cloud's product experts took knowledge from over five years of real customer implementations on the former tool in order to standardize many of the most common real-world use cases in the Document Designer.

Where previously in the former tool (and to this day in other products) some desired complex use cases required tedious workarounds or custom scripting, the Document Designer comes with robust rich-text document functionality and use cases built-in, requiring minimal setup.

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CONTACT US
For more information about CPQ Cloud or the Document Designer, visit oracle.com or call

Hardware and Software, Engineered to Work Together

Oracle is committed to developing practices and products that help protect the environment