



Tacton CPQ SaaS Product Description

| | |
|-----------|------------|
| Version: | 1.0 |
| Status: | Approved |
| Released: | 2026-03-20 |



Table of Contents

| | | |
|----------|--|-----------|
| 1 | Purpose of this document | 4 |
| 2 | Definitions and terminology | 4 |
| 3 | Tacton CPQ Product Structure | 5 |
| 4 | Tacton CPQ Product Capabilities | 6 |
| 4.1 | Base Platform Capabilities | 6 |
| 4.1.1 | Product Configuration and Catalog | 6 |
| 4.1.2 | Pricing | 6 |
| 4.1.3 | Quoting, Document Generation and Ordering | 7 |
| 4.1.4 | Sales efficiency tools | 7 |
| 4.1.5 | Workflows - Lifecycles on any Object | 7 |
| 4.1.6 | Tacton Insights & Analytics | 8 |
| 4.1.7 | Tacton Administration | 8 |
| 4.1.8 | Basic Integrations | 8 |
| 4.1.9 | Platform and Access | 9 |
| 4.1.10 | Architecture, security and compliance | 9 |
| 4.2 | Tacton CPQ Add-ons | 9 |
| 4.2.1 | Service Sales | 9 |
| 4.2.2 | Subscription Pricing | 9 |
| 4.2.3 | Advanced System Configuration | 9 |
| 4.2.4 | Product Visualization | 10 |
| 4.2.5 | Layout Planning | 10 |
| 4.2.6 | Mass Configuration Management | 10 |
| 4.2.7 | Environmental Footprint Configuration | 10 |
| 4.2.8 | CAD Automation | 10 |
| 4.2.9 | Additional Front-End Environment | 10 |
| 4.2.10 | Additional Tenant | 11 |
| 4.2.11 | Data Import Automation | 11 |
| 4.2.12 | Connect to Anything | 11 |
| 4.3 | Self-Service Channels | 11 |
| 4.3.1 | Supported Add-ons in Self-Service Channels | 12 |
| 5 | Usage Metrics in Tacton CPQ | 12 |
| 5.1 | Usage metrics are only collected in Customer's Tacton CPQ Production Tenants | 12 |
| 5.2 | Named users | 14 |



| | | |
|----------|---|-----------|
| 5.2.1 | Internal vs External Named Users | 15 |
| 5.2.2 | Over usage of Named Users..... | 15 |
| 5.3 | Solutions | 15 |
| 5.3.1 | Over usage of Solutions..... | 16 |
| 5.4 | Connect To Anything | 17 |
| 5.4.1 | Over usage of Connect To Anything Tasks | 18 |
| 5.5 | Self-Service Channels | 18 |
| 5.5.1 | Over usage of Self-Service Channels Tokens | 19 |
| 6 | Usage Limits and Fair Usage | 20 |
| 7 | Appendix | 20 |
| 8 | Legacy Tacton CPQ Product Capabilities | 20 |
| 8.1 | Customer Self Service | 20 |





1 Purpose of this document

For a Tacton CPQ customer, this document describes:

- High level product Capabilities (currently) available in Tacton CPQ Software, based on how Tacton offers the product commercially. Full technical documentation about features is located in Tacton CPQ Help Center which can be found in Tacton Administration inside Customer's tenant.
- Definitions of usage metrics, i.e. how Tacton measures usage

2 Definitions and terminology

"Tacton CPQ Tenant" means a unique and complete SaaS tenant including one Tacton Administration, and one or multiple connected front-end environments. There are three types of tenants: Production, Early Access and PoC/Demo

"Tacton CPQ Production Tenant" means the customer Tacton CPQ Tenant used for production purposes. At signing, customer receives a Production tenant consisting of one Tacton Admin and two connected Front-end Environments (typically one used for Live and the other used for Testing/UAT). If Customer subscribes to the add-on *Additional Front-end Environment* that is added to the Production Tenant.

"Tacton CPQ Early Access Tenant" means the customer Tacton CPQ Tenant used for testing early releases of Tacton CPQ Product Capabilities. Early Access Tenants receive product releases earlier than Production Tenants. At signing, customer receives an Early Access tenant consisting of one Tacton Admin and one connected Front-end Environment.

"Named User" is the commercial unit in our SaaS model. One Named User is one paid seat for a specific individual (internal or external) who is allowed to use Tacton CPQ under the customer's subscription. Named Users are measured as a distinct/unique email address from any user registered across Admin or Front-end Environments in a customer's Tacton CPQ Production Tenant.

"Internal Named User" means an individual who is an employee, contractor or consultant to Customer authorized by Customer to use a Service, for whom Customer has ordered the Service, and to whom Customer (or when applicable, Tacton at Customer's request) has supplied a user identification and password but excluding External Users.

"External Named User" means an individual who is not an employee, contractor or consultant to Customer but who is authorized by Customer to use Services. Limitations of the Services' functionality apply to External Users (e.g. admin access) as described in this document.

"(Registered) User" means a registered user account in a Tacton Front-end environment or in a Tacton Admin Environment.

“**Legacy Product Capabilities**” means Tacton CPQ Capabilities that are no longer sold or further developed by Tacton hence not available to new customers, but may be in use among existing customers.

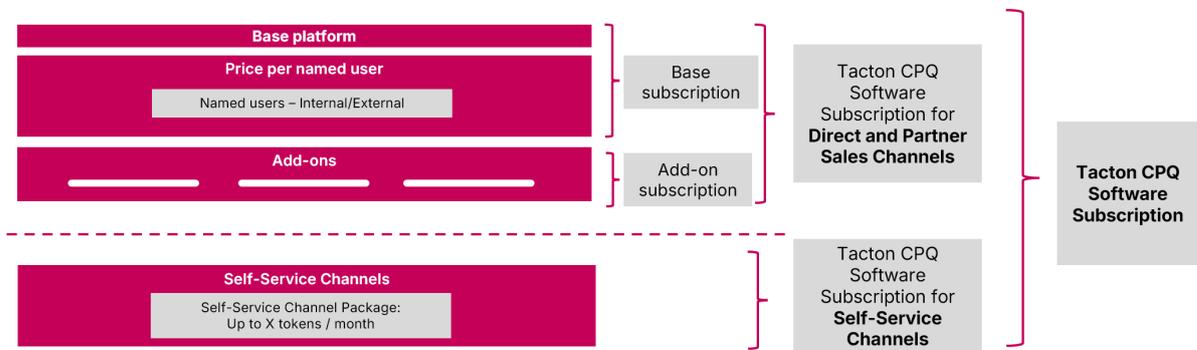
“**Direct Sales Channel**” The direct sales channel is designed to be the internal tool for sales representatives, sales managers, and sales engineers. Here they have access to all features to propose compelling offers to customers. The direct sales channel is used by customer’s employed sales staff who configure, price and quote by logging in to Tacton CPQ with registered (internal) users.

“**Partner Sales Channels**” means Customer’s sales partners who configure, price and quote by logging in to Tacton CPQ with registered (external) users

“**Self Service Channel User**” means Customer’s buyers who configure, price quote by using Tacton CPQ’s Self-Service Channels Capability in an external third-party website.

“**Usage Metrics**” means the units, measures, or parameters used to calculate fees for the Services, as specified in the applicable Order Form, including but not limited to users, tokens, solutions, tasks, service credits, or other usage- or capacity-based measurements.

3 Tacton CPQ Product Structure



4 Tacton CPQ Product Capabilities

4.1 Base Platform Capabilities

4.1.1 Product Configuration and 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 alternative BoM structures (e.g. Sales BoM & Engineering BoM)
- Configuration templates: Allow sales representative to save successful configuration starting points and share them with the organization
- Upsell accessories effectively with Options Management and ensure that offered accessories are compatible with the configured product configuration
- Basic 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.
- Configuration Find: quickly find questions and alternatives in a large configuration
- Automatic conflict resolution in configuration, based on attribute constraints in the product model
- Define mandatory fields in the configurator to ensure that you collect the required customer needs for a valid configured product
- Product catalog of configurable and non-configurable products. Filters and need-based questions guide the user to find the right configurable product for the use case.
- Support for extensive internal or external product catalogs
- Optimize the solution on the customer's purchasing driver. If there are multiple valid solutions, you can define search strategies to select a preferred solution based on customer's purchasing driver, e.g. minimizing weight, shortest delivery time, maximizing Eco-friendliness or maximizing performance.

4.1.2 Pricing

- Build your price waterfall with Tacton's advanced price modeling tools. Design cost-plus, list-less or any other price model for your configurable products
- Mixed price types in the same deal (one-time, recurring and usage-based) enables you to offer full solution to your customers within the same quote.
- Define automatic and manual discounts and adjustments mechanisms
- Automatic margin control: Automatically calculate the deal margin, and define how your sales representatives are permitted to adjust pricing – and trigger Business Approval workflows if those thresholds are violated in deals
- Connect your price model with role permissions, workflow, and approvals. Define what roles can see/edit what columns in your price waterfall.
- Advanced Price Editor: Empower your sales rep to get overview of large and hierarchical Sales Bill-of-Materials, and to intuitively edit any adjustments
- Delta pricing in configurator: show incremental prices before making a configurator selection
- Connect cost elements with module variants to calculate margins for every configuration

- Currency exchange rates and locked currency rates for long-term deals

4.1.3 Quoting, Document Generation and Ordering

- Build document templates in Microsoft Office programs and connect them with any attributes and data from Tacton CPQ
- Use the formatting power of Microsoft Office apps to create compelling and on-brand quote docs, including Headings, Chapters, Paragraphs, Dynamic Tables, Styling and Branding.
- Maximize quote accuracy with validated product and pricing data from configurator results and pricing
- Create compelling quotes with rich data early in the buying journey, for example Sales Bill of Material, Tech specs, CAD drawings, and product visualizations.
- Leverage Tacton's DocGen engine to create not only quotes, but also manuals, tech specs, internal sales reports etc.
- Automatic quote localization (Language, Currency or Unit of Measure)
- Proposal Collaboration: A micro-site for each deal where Sales representative and end customer can share documents and collaborate to drive the deal forward
- Decompose your orders into smaller chunks and spread them out over time (aka *Split Runs*)

4.1.4 Sales efficiency tools

- Lightweight CRM with standard objects Accounts, Opportunities, Solution, Contacts etc., and the possibility to create custom objects.
- Tailor objects' attributes and page layouts according to your business needs.
- Role-specific dashboards, notifications and collaboration tools for your sales teams
- Copy, import, and reuse previous solutions, speeding up repetitive business
- Automatic update mechanisms to assist sales reps in always using the latest product models and pricing data. This effectively prevents your sales force from offering legacy products and prices
- Line-item management, e.g. recording and creating hierarchies of the quote line items. This enables your sales representatives to flexibly present the solution to resonate with customer's expectations.
- Offer alternative products/solutions in the same deal.
- Compare records of any object, e.g. Solutions
- Use any Unit of Measure in configurator, Bill of Material or documents – and translate seamlessly between them
- Enable end user help and guidance with the help of Tacton's integrations with Digital Adoption Platforms, such as Stonly.
- iOS apps for Tacton CPQ and Approvals
- User management of your Sales representatives and resellers

4.1.5 Workflows - Lifecycles on any Object

- Standard out-of-the-box lifecycles for Engineer-To-Order/Special Requests and Business Approvals
- Create custom Lifecycles across any Tacton CPQ objects to support your business processes.

4.1.6 Tacton Insights & Analytics

- Behavior and Engagement Analytics: In-depth analytics of CPQ front-end feature usage and performance. Track user adoption to ensure that the CPQ tool is leveraged in the best way to ensure ROI of your CPQ investment.
- The Analytics API feature makes it possible to access and extract transactional and master data from a connected environment. This data can be used in a 3rd party analytics tool.
- 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.

4.1.7 Tacton Administration

- No/Low code platform, empowering your product experts, pricing experts and business process owners to govern how CPQ should behave and look for your sales users, resellers and end-customers.
- Customize administrator permission roles for different types of logic and data.
- Product modeling tools to define the variance of your configurable products (logic and data).
- Pricing modeling tools to define the logic, data and visibility of your price waterfall.
- Tools to manage your document templates, CAD Automation set-up, Visualization set-up and Integrations.
- Over 40 ready-made page panels with dedicated functionality to enable you to build front-end pages quickly
- Collaborate effectively in global teams with tickets, version history, and quality assurance tools
- Quick release management tools ensure that the logic and data of your CPQ is up-to-date and accurate in all sales channels
- Desktop Connector – edit Admin data in MS Office applications
- Define custom Roles and Organizational structure to define governance rules for objects (read/write) and workflows for the front-end users. This includes both Direct and any Reseller channels
- Localization, translation, branding, and languages of the CPQ application

4.1.8 Basic 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).
- Use Tacton-hosted trampolines to transfer data in and out of Tacton. Trigger trampolines with Lifecycle state transitions
- CRM Integrations. Seamlessly embed Tacton CPQ in your Salesforce Sales/Community Cloud or MS Dynamics and use Tacton-hosted integration trampolines to define and automate the data and document flows between the systems. Sales representatives do not need to log in to Tacton CPQ but can run the complete deal from within the CRM.
- Product validations. Validate, simulate or calculate the configured product in external system before presenting it to the customer, ensuring that its performance is in line with customer expectations. The engineering calculations from your simulation software can be automatically embedded into the quote or be used as input parameters for a re-configuration.

- External Panels. Unlocks the possibility to add external panels to object page layouts. This panel can be configured to display external applications in the direct sales user interface.

4.1.9 Platform and Access

- 2 Tacton CPQ tenants:
 - Production: 1 Administration + 2 Front-end/ Connected Environments
 - Early Access: 1 Administration + 1 Front-end/ Connected Environment
- Regular Tacton CPQ product releases directly available in your Tacton CPQ SaaS environments
- Help Center and Release notes
- Access through any standard web browser

4.1.10 Architecture, security and compliance

Security is always a top priority at Tacton. Tacton adheres to the security and data protection requirements in ISO/IEC 27001. In addition, Tacton undergoes an annual SOC 2 Type II audit and has successfully completed it.

More information on security practices can be found in *Tacton CPQ SaaS - Architecture and Security* upon request.

4.2 Tacton CPQ Add-ons

Add-ons extend the Tacton CPQ functionality in various ways. Add-ons can be added to Customer's subscription at any time. Removal of add-ons is only permitted at contract renewal.

4.2.1 Service Sales

Pull in your installed-base data into Tacton CPQ and customize the service offerings for each customer asset, including tasks, intervals and resources needed. Base service offerings on past and forecasted equipment usage and then create quotes with the click of a button.

With clear and transparent service costs, the sales rep can define a customer net price to secure a profitable quote margin – in any currency. When the deal is closed, send the order directly into your downstream systems.

4.2.2 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.

4.2.3 Advanced System Configuration

Extend the Basic System Configuration capabilities, customizing how your interconnected configurable products should behave and be experienced. Confidently offer large system configurations while maintaining high performance and seamless sales experience.



4.2.4 Product Visualization

Display a 3D real-time visualization of the configured product. Share the visualization with others. Experience the product through Augmented Reality. Generate screenshots for your proposal documents.

Photo-realistic product presentation – creating a true wow experience for your end-customers. Upload custom images and place them onto the 3D surface of the configured product, e.g., custom logos or branding elements.

4.2.5 Layout Planning

Display a 3D real-time visualization of the configured product. Share the visualization with others. Experience the product through Augmented Reality. Generate screenshots for your proposal documents.

Use drag & drop in the visualization to configure layouts of products and systems of products. Upload floor-plans from the end customer and position the scaled visualized products to see if they fit into the intended space.

4.2.6 Mass Configuration Management

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

4.2.7 Environmental Footprint Configuration

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 environmental footprint calculation for every configurator selection. Integrates with major Life-Cycle Assessment vendors, such as *SimaPro*.

Optimize whole solution on lowest footprint. Make the product footprint available in quotes and reports.

4.2.8 CAD Automation

Empower your sales to generate 2D and 3D CAD drawings based on a configured product, directly from the web browser. Share drawings embedded in quotes or as separate files. Available for SOLIDWORKS, Autodesk Inventor and PTC Creo.

4.2.9 Additional Front-End Environment

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

4.2.10 Additional Tenant

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

4.2.11 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.

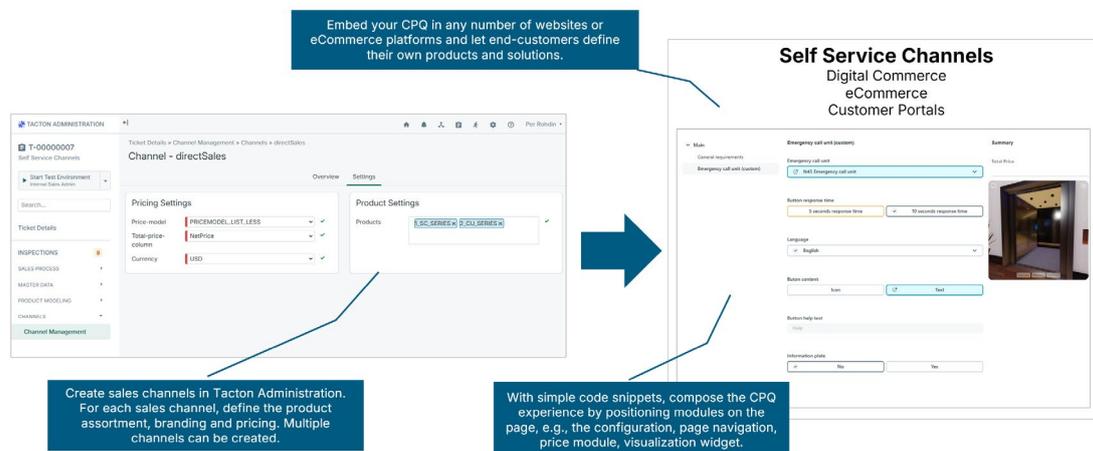
4.2.12 Connect to Anything

No-code integration platform allowing business users to create automated workflows to/from Tacton CPQ without extensive programming knowledge. Powered by Workato.

Out-of-the-box connectors to more than 600 enterprise applications – or build your own connector for your enterprise application, database, and service.

4.3 Self-Service Channels

Embed your CPQ in any number of websites or eCommerce platforms and let end-customers define their own products and solutions. For each sales channel, customize the product assortment, UI, branding and pricing directly from Tacton Admin, radically reducing the time to reach new markets.



Self-Service Channels users (i.e. Customer's buyers), do not log in to Tacton CPQ. Instead, Customer is responsible for managing user access and authentication on the website the channel is embedded into.

4.3.1 Supported Add-ons in Self-Service Channels

Tacton CPQ Add-ons are always supported in the Direct and Partner sales channels, available when logged into Tacton CPQ Front-end or Admin. Although Tacton tries to support all add-ons in all sales channels, there may be some restrictions to how add-ons are supported in Self-Service Channels. The table below lists the current status:

| Tacton CPQ Add-on | Supported in Self-Service Channels | Comment |
|---------------------------------------|------------------------------------|--|
| Service Sales | No | |
| Subscription Pricing | No | |
| Advanced System Configuration | Yes | |
| Product Visualization | Yes | |
| Layout Planning | No | |
| Mass Configuration Management | No | |
| Environmental Footprint Configuration | No | |
| CAD Automation | No | |
| Additional Tenant | Not applicable | Self-Service Channels add-on is available for any purchased tenant. |
| Additional Front-end Environment | Not applicable | Additional Front-end Environment is not related to Self-Service Channels and thus not applicable. |
| Data Import Automation | Not applicable | Data Import Automation is a back-end function and does not show in any front-end channels. The data Customers import via Data Import Automation is available for any channel. |
| Connect to Anything | Not applicable | This is back-end functionality and does not show in any front-end channels. The data imported/exported via Connect to Anything Integrations, are available for/from any channel. |

5 Usage Metrics in Tacton CPQ

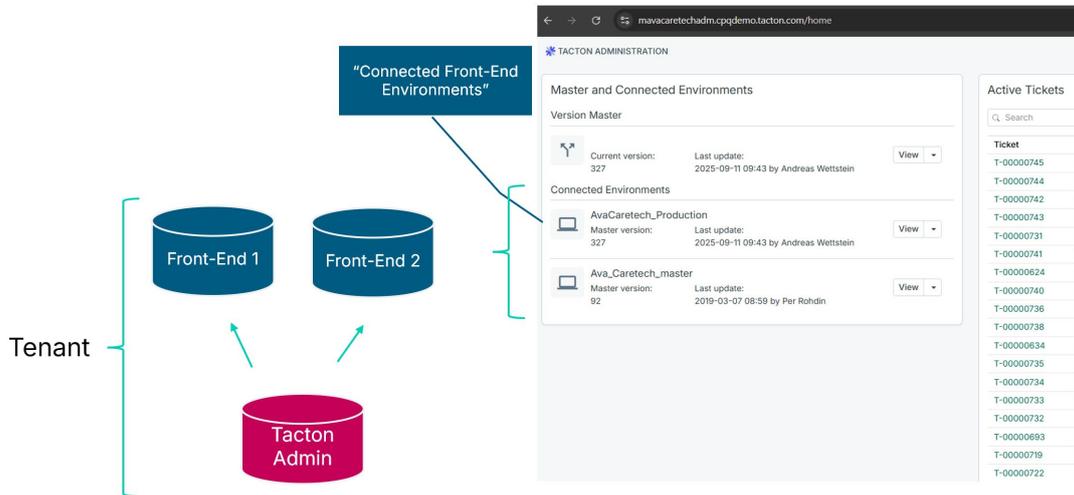
A Tacton CPQ Subscription may include allowances of usage metrics, e.g. number of Named users, Number of Solutions or number of Self-Service Channels tokens. This section describes how Tacton defines those usage metrics and the consequences if the usage allowances in your Tacton CPQ Subscription are exceeded.

5.1 Usage metrics are only collected in Customer's Tacton CPQ Production Tenants

A Tacton CPQ Tenant is a combination of

- 1 Tacton CPQ Administration environment (in which Administrators setup Tacton CPQ)

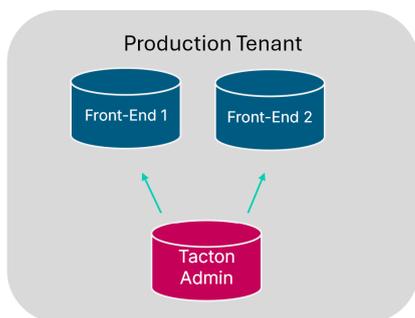
- One or multiple Connected Front-end Environments (where customers' Sales Reps/Managers/Engineers create transactional data such as Solutions, Configurations, Quotes and Orders). In Tacton Administration, Customer can see the Tenant's connected front-end environments



Unless otherwise agreed in writing, Customer receives one Production Tenant and one Early Access tenant – as shown in the image below. Customer's usage – for instance number of Named Users, Solutions, Connect To Anything etc. - **is only measured in Customer Production Tenants**. Usage in Early Access or possible PoC/Demo Tenants that Customer may have received are not measured.

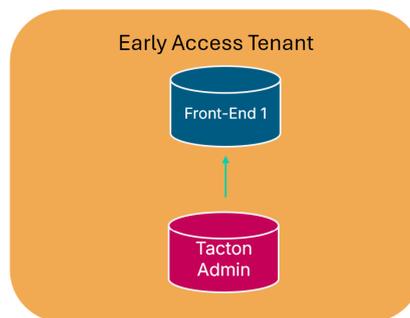
Production Tenant

1 Administration + 2 Connected Front-end Environments

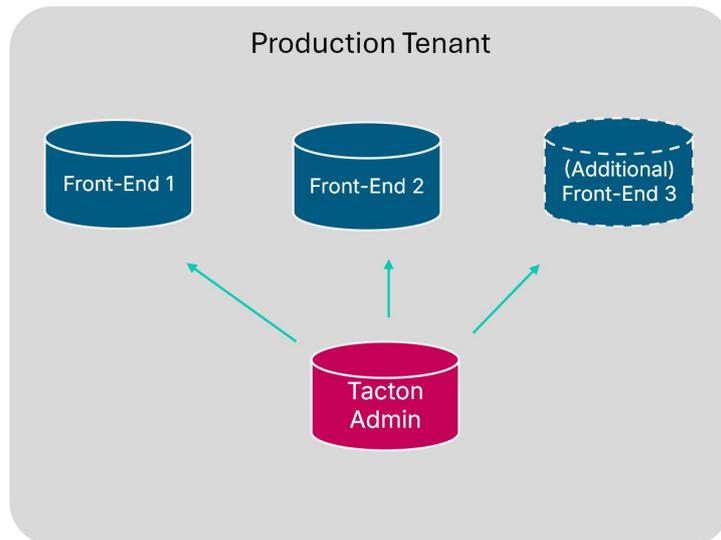


Early Access Tenant

1 Administration + 1 Connected Front-end Environment



If Customer at a later stage starts to subscribe to the *Additional Front-end Environment* add-on, that front-end is added to the Production Tenant and thus becomes a part of the usage metrics of that Production Tenant.



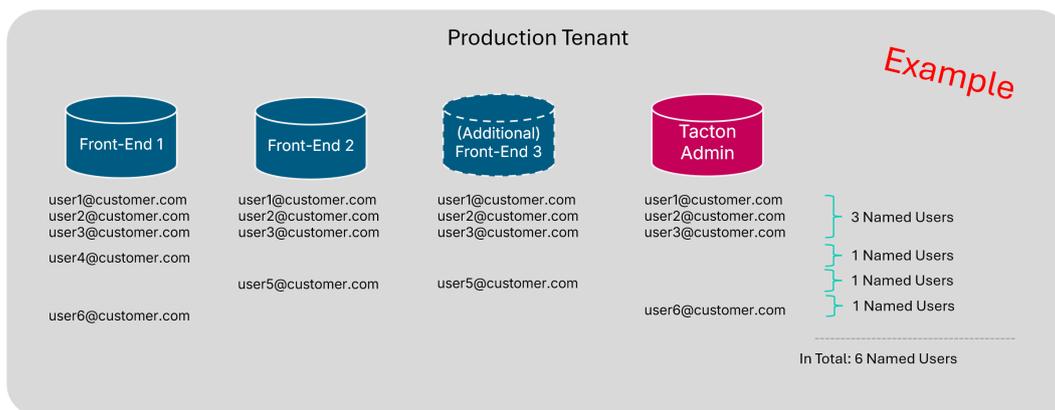
If Customer has purchased the add-on *Additional Tenant*, which in essence is an additional Production Tenant, usage is measure also in that tenant.

5.2 Named users

Named User is a commercial unit in our SaaS model, appearing on Customer’s Subscription and Order Forms. A *Named User* is a paid seat for a specific human individual or non-human agent or technology, who is allowed to use Tacton CPQ under the customer’s subscription.

A *Named User* is counted by distinct/unique email address from any user registered across Tacton Administration or Front-end Environments in a customer’s Production Tenant.

In the example below, the Production Tenant has 17 Registered Users across the Tacton Administration and Connected Front-end environments, but only 6 Named Users (distinct email addresses).



5.2.1 Internal vs External Named Users

Internal Named Users are counted based on the email domain of the registered users. Customer is obliged to share with Tacton the email domains of existing and future Tacton CPQ users that are either employees, contractors or consultants. Named Users with those email domains will be counted as Internal.

Named Users with other email domains will be counted as External.

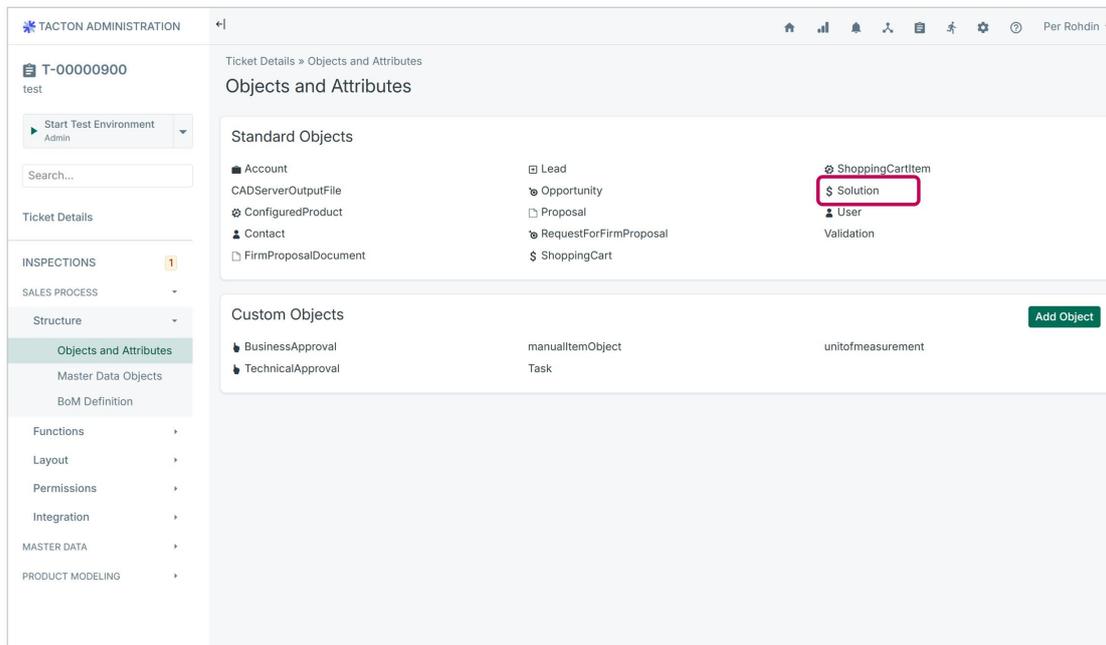
5.2.2 Over usage of Named Users

Customer is responsible for ensuring that no more Named Users than included in the Customer's Subscription are registered in Tacton CPQ. If the number of Named Users exceeds the number in the Subscription, Tacton is entitled to invoice overage Named Users by Price per Named User x 150%

5.3 Solutions

In Customer's Tacton CPQ Subscription, there may be an allowance on number of *Solutions* created. Solution is a Standard Object in Tacton CPQ, which typically collects the contents of an Opportunity deal, e.g. Line items, Pricing, Proposal Documents, CAD Documents, and Workflows.

Learn more about Tacton CPQ Solution object and how it creates value in this video: <https://tacton.wistia.com/medias/f28mfrage3h>



The screenshot displays the Tacton Administration interface. The top navigation bar includes 'TACTON ADMINISTRATION', a home icon, signal strength, a notification bell, a user profile icon, a search icon, a settings gear, a refresh icon, and the user name 'Per Rohdin'. The main content area is titled 'Ticket Details > Objects and Attributes' and 'Objects and Attributes'. It is divided into two sections: 'Standard Objects' and 'Custom Objects'. The 'Standard Objects' section lists various objects with checkboxes: Account, CADServerOutputFile, ConfiguredProduct, Contact, FirmProposalDocument, Lead, Opportunity, Proposal, RequestForFirmProposal, ShoppingCart, ShoppingCartItem (highlighted with a red box), and User. The 'Custom Objects' section lists BusinessApproval, TechnicalApproval, manualItemObject, and unitofmeasurement, with an 'Add Object' button. A left sidebar contains navigation options: 'T-0000900 test', 'Start Test Environment Admin', a search bar, 'Ticket Details', 'INSPECTIONS', 'SALES PROCESS', 'Structure', 'Objects and Attributes' (selected), 'Master Data Objects', 'BoM Definition', 'Functions', 'Layout', 'Permissions', 'Integration', 'MASTER DATA', and 'PRODUCT MODELING'.

Solutions are measured as:

- Solution instances are measured only in Customer's Production Tenants (excluding Tacton Admin in the Production tenant)

- Solution instances are measured regardless of what user type creates the instance, e.g. Internal User, External user or API user
- Solutions instances are measured regardless of whether they were manually created, copied, converted from Self-Service Shopping Cart or created by other means
- Solution instances are measured regardless of whether the deal is won or lost, or regardless of what life cycle state the Solution instance is in, e.g. Archived or Deleted

If Customer’s implementation of Tacton CPQ does not use the *Solution* standard object, but instead use a custom object for similar purposes, Tacton will count the instances of the custom object instead.

Monthly average of newly created Solutions

In Customer’s Subscription it will be stated an *annual* allowance of number of solutions as well as a *monthly average* of newly created Solution Instances. This is how Tacton measures the Solution Monthly Average:

- *Monthly Solutions*: The number of new solutions created during a month is calculated on the first day of the next month.
- *Monthly Average* is the average of monthly solutions – rolling 12 months back
- *Monthly Average* for the past 12 months is measured first day of every month



5.3.1 Over usage of Solutions

Customer is responsible for ensuring that the Monthly Average number of Solutions created 12 months back is within the monthly allowance stated in the Subscription. If customer exceeds the Monthly Average solution allowance, Tacton has the right to adjust the price per Named user and readjust the contracted solution allowance.

If the Monthly Average of solutions in Customer’s Production tenant exceeds the contracted solution allowance for a month, Tacton is entitled to invoice customer additional 10% of the Base Subscription fee.

5.4 Connect To Anything

Tacton CPQ add-on *Connect To Anything* – powered by Workato – allows you to create integrations between Tacton CPQ and other systems. Tacton CPQ's connector must be one part in any integration you build with *Connect To Anything*.

Connect To Anything is sold through Task Packages. A Task Package is listed on Customer's Subscription, and describes the maximum number of monthly/annual tasks Customer is entitled to consume, e.g.:

- *Connect to Anything Package - Up to 34 000 Tasks / month (408 000 Tasks annually)*

A task is a unit of work that occurs every time a recipe performs an action that requires compute resources. Every time a recipe invokes an action provided by a connector counts as one task. Since Tacton *Connect To Anything* makes use of Workato middleware, Tacton defines and counts Tasks in the same way as Workato does:

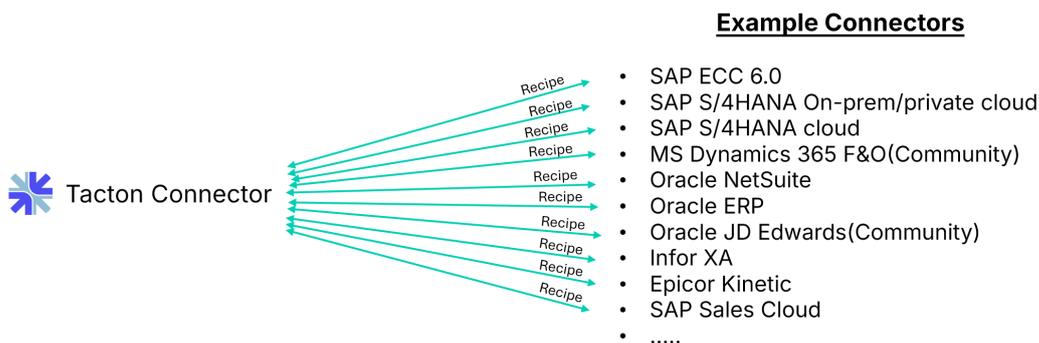
<https://docs.workato.com/en/recipes/tasks.html#task-rules>

Customer can optimize task consumption in their implementation by these recipe building techniques:

- Adjust poll trigger frequency
- Implement scheduled jobs
- Use batch/bulk triggers and actions
- Use streaming actions
- Declare multiple variables

Learn more: <https://docs.workato.com/en/recipes/optimizing-task-usage.html>

Tasks are counted in all recipes and connectors that are associated with the Tacton Connector - regardless of the number of connectors or recipes used by the customer.

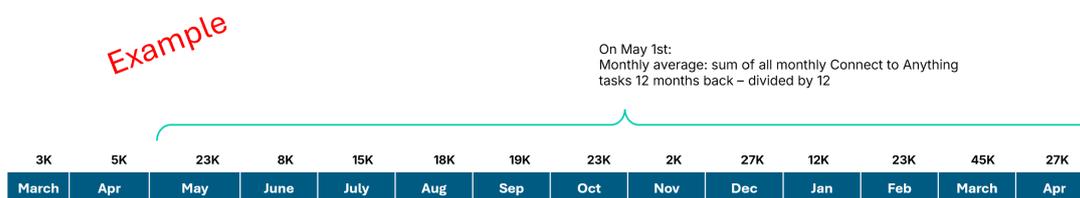


Tacton counts all tasks that are consumed in any customer Tacton CPQ tenant

Tasks are counted annually to avoid seasonal fluctuations – rolling 12 months back with a monthly average.

- Monthly Connect To Anything tasks: The number of tasks consumed for a month is calculated on the first day of the next month.

- *Monthly average CTA Tasks* is the average of monthly CTA tasks – rolling 12 months back
- Monthly average for the past 12 months is measured first day of every month



Package Subscription fee is paid regardless of the number of tasks used. Unused Tasks cannot be transferred to the next period.

5.4.1 Over usage of Connect To Anything Tasks

Customer is responsible for ensuring that the Monthly Average Connect To Anything Tasks consumed in Tacton CPQ, does not exceed the allowance stated in the subscribed task package.

Over-usage tasks will be charged 1,5 times the list price of the average task in the purchased package.

5.5 Self-Service Channels

Tacton CPQ's *Self-Service Channels*, allows Customer to embed the CPQ into external websites, eCommerce platforms and customer portals. Customer is responsible for managing user access control and authentication on the websites into which the channels are embedded.

Self-Service Channels is based upon two key objects, Collections and Products, where a collection is the grouping of a set of products that will be priced and sold together. On the external website in which the CPQ channel is embedded, the buyers/users will perform different *tasks in relation to these two objects*. Each of those tasks is associated with a Token cost, according to the following:

| Task | Task description | Token Cost |
|---|---|------------|
| Start configuration | Start a configuration session. Includes any number of user selections/commits as well as price calculations during the session. Includes any number of reconfigurations started from a collection. | 1 |
| Start configuration with product visualization | Start a configuration session with visualization. Includes any number of user selections/commits as well as any price calculations and visualization updates during the session. Includes any number of reconfigurations started from a collection. | 1,1 |

| | | |
|---|---|------|
| Add product to collection | Add a configured product to a collection or add a non-configurable product from catalog to a collection. Includes any number of reconfigurations started from a collection. | 0,25 |
| Generate and download a document | Add transactional data from Tacton CPQ into a document and let the user download the document. | 1 |
| Fetch order information | Via API, fetch transactional data from configurations or collections, to be used as order material in downstream fulfillment systems. | 2,5 |

Thus, the more tasks performed by end-users/buyers, the more tokens will be consumed. By regulating the tasks enabled on the external website, Customer can design the channel and its usage according to the business needs of that channel. And by regulating user access and authentication, Customer can regulate the token consumption.

The number of supported Tasks in the Self-Service Channels addon will evolve over time.

Self-Service Channels is sold through *Token Packages*. The selected Token Package is listed on Customer's Subscription, and describes the maximum number of monthly/annual tokens Customer is entitled to consume, e.g.:

- *Self Service Channel Package – Up to 10 000 Tokens / month (120 000 annually)*

Tokens are counted across all Self-Service Channels set up in the Customer's Tacton CPQ Production Tenants.

Tokens are counted annually to avoid seasonal fluctuations – rolling 12 months back – and averaged monthly.

- *Monthly Self-Service Channels Tokens*: The number of consumed tokens during a month is calculated on the first day of the next month.
- *Monthly average Self-Service Channels Tokens* is the average of monthly Tokens – rolling 12 months back
- Monthly average for the past 12 months is measured first day of every month



Fee for the subscribed token package is paid regardless of the number of tokens used. Unused tokens cannot be transferred to the next period.

5.5.1 Over usage of Self-Service Channels Tokens

Customer is responsible for ensuring that the consumed Monthly average Self-Service Channels Tokens in Tacton CPQ, does not exceed the allowance stated in the subscribed Self-Service Channels token package.

Over-usage token quantity will be charged 1,5 times the list price of the average token in the purchased package.

6 Usage Limits and Fair Usage

To ensure the stability, security, and performance of the Tacton CPQ SaaS Services for all customers, use of the Services is subject to reasonable technical and operational limits as described in this Documentation.

Customer shall not use the SaaS Services in a manner that results in excessive or abnormal consumption of system resources or that materially degrades the performance, availability, or security of the Services.

Such excessive usage may include, for example:

- excessive API calls or integration requests, or excessive data sets;
- automated or programmatic activity generating abnormal system load;
- artificial intelligence agents or automated systems generating disproportionate processing requests;
- repeated or large-scale background processing, data imports, exports, or configuration runs that materially exceed typical usage patterns

Tacton may implement reasonable technical measures to protect the Services, including rate limiting, throttling, temporary usage restrictions, or requiring Customer to purchase additional capacity or subscriptions appropriate for the level of usage.

Where practicable, Tacton will provide notice before applying such measures.

7 Appendix

8 Legacy Tacton CPQ Product Capabilities

8.1 Customer Self Service

Customer Self-Service (Configuration subscribed) - AA309

Configuration Session: means an API request from an end-user starting a configuration session within a third-party application. Configuration of several products for one end-user counts as several Sessions. Reopening of previously created configuration counts as a new session.

Subscription Level: means a volume subscription level described as the maximum number of Configuration Sessions Customer may use per 12-month period of the Initial Term or a Renewal Term.

Customer Self-Service (Configuration non-subscribed) - AA310

Overage Sessions: means the difference between the maximum number of Sessions for the Subscription Level subscribed to by Customer and the higher number of Sessions used by Customer during the applicable period. The fee for Overage Sessions shall be the Subscription Fee of the current Tier. For avoidance of doubt, for Customer to advance to a higher Tier, an order form must be executed. Merely using more Sessions than those included in the current Tier does not automatically result in Customer advancing to a higher Tier.



Customer Self-Service (Create Basket subscribed) - AA434

Basket Session: means the point where a user creates a Basket (shopping cart) with one or more products via an API call through Customer Self Service. When the basket is created the user can then freely add or remove products in this basket.

Customer Self-Service (Create Basket non-subscribed) - AA435

Overage Baskets: means the difference between the maximum number of Baskets for the Subscription Level subscribed to by Customer and the higher number of Baskets used by Customer during the applicable period. The fee for Overage Sessions shall be the Subscription Fee of the current Tier. For avoidance of doubt, for Customer to advance to a higher Tier, an order form must be executed. Merely using more Sessions than those included in the current Tier does not automatically result in Customer advancing to a higher Tier.