



Tacton CLM SaaS Product Description

Configuration Lifecycle Management

Version:	1.0
Status:	Approved
Released:	2026-09-30



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1 Purpose of this document

Tacton CLM (Configuration Lifecycle Management) is part of Tacton's Connected Suite, together with Tacton CPQ (Configure Price Quote) and Tacton COF (Configured Order Fulfillment). For a Tacton CLM customer, this document describes the general product capabilities of CLM when included in the Connected Suite as well as when purchased separately (CLM + CPQ). Full technical documentation about product features is in Tacton CLM's Help Center which can be found in Tacton Administration inside Customer's tenant.

This document forms part of the Documentation referred to in the Tacton Master Services Agreement. Tacton may update this document from time to time. The then-current version is published at <https://www.tacton.com/legal-information>. Superseded versions are available from Tacton on request.

2 Definitions and terminology

"Tacton Connected Suite" means the combined environment of Tacton CPQ, Tacton CLM and Tacton COF operating together.

"Tacton CLM" means Tacton Configuration Lifecycle Management, the Tacton product described in this document. "CLM" is used as the abbreviation of Configuration Lifecycle Management throughout this document.

"Tacton COF" means Tacton Configured Order Fulfillment, the Tacton product that automates processing of configured orders to generate order specific engineering bill of material s(100% EBOM) from a product model (150% EBOM) and derives order-specific manufacturing structures (100% MBOM) from it and a 150% MBOM model. "COF" is used as its abbreviation.

"Tacton CPQ" means Tacton Configure Price Quote, the Tacton product used to configure, price and quote.

"Tacton CLM Production" means the customer Tacton CLM used for production purposes.

"Tacton CLM Early Access" means the customer Tacton CLM used for testing early releases of Tacton CLM Product Capabilities. Early Access Tenants receive product releases earlier than Production Tenants.

"CLM & COF workspace" means the Tacton CLM and Tacton COF user interface for product modeling. It is embedded in Tacton Administration.

"Domain" means a named definition of a permitted value set and its data type of attributes.



“Attribute” means a named property used to describe items. Attributes in CLM and COF are global, which means that an attribute definition can be shared by multiple product models. Attributes are revisioned.

“Item” means an engineering or manufacturing part or assembly under management in Tacton CLM and COF, created in the system or synchronized from Customer’s PLM system. Items are revisioned.

“Configurable Item” means an item that describes a configuration model that is used to generate variants of the same base design. A configurable item is defined by its parameter attributes, configuration rules and its configurable product structure, 150% EBOM.

“150% EBOM” (also “super EBOM”) means the engineering Bill of Materials of a configurable product containing, for each position, all items that could appear in any variant that Customer offers, together with the technical constraints and selection conditions that govern them.

“100% EBOM” means the engineering Bill of Materials generated for one specific configuration, i.e. the result of applying the technical constraints and selection conditions of the 150% EBOM to a set of parameter attribute values (configuration selections).

“150% MBOM” means the manufacturing Bill of Materials model of a configurable product, containing all manufacturing items, assemblies, routings and work instructions that could apply to any variant that Customer offers, together with the manufacturing rules that select them. A separate 150% MBOM is typically maintained for each production facility. 150% MBOMs are derived from the 150% EBOM and are set up and maintained in Tacton COF.

“100% MBOM” means the manufacturing Bill of Materials generated for one specific configured order at one specific production facility, i.e. the result of applying the manufacturing rules of the 150% MBOM to the corresponding 100% EBOM. 100% MBOMs are generated by Tacton COF.

“150% SBOM” (Sales Bill of Materials) means the sales-facing structure of a configurable product, containing all quote line items – the price-bearing assemblies, positions, modules and module variants – that could appear in any variant that Customer offers, together with the sales and market constraints and the price rules that govern them. 150% SBOMs are set up and maintained in Tacton CPQ. The 150% SBOM is mapped to the 150% EBOM, but not necessarily one-to-one: a sales line item may correspond to a single engineering item, to several, or to a commercial construct such as a customer need or a standard that has no direct engineering equivalent.

“100% SBOM” means the Sales Bill of Materials generated for one specific configuration, i.e. the result of applying the technical constraints, the sales and market constraints and the price rules to a set of configuration selections. The 100% SBOM is the customer-facing set of quote line items presented on the quote. 100% SBOMs are generated by Tacton CPQ.

“Derived structure” means a secondary item structure derived from the (primary) 100% EBOM. This is typically a 100% MBOM, but could also involve other structures such as packaging instructions, spare parts structures or service BOMs. The logic of generating

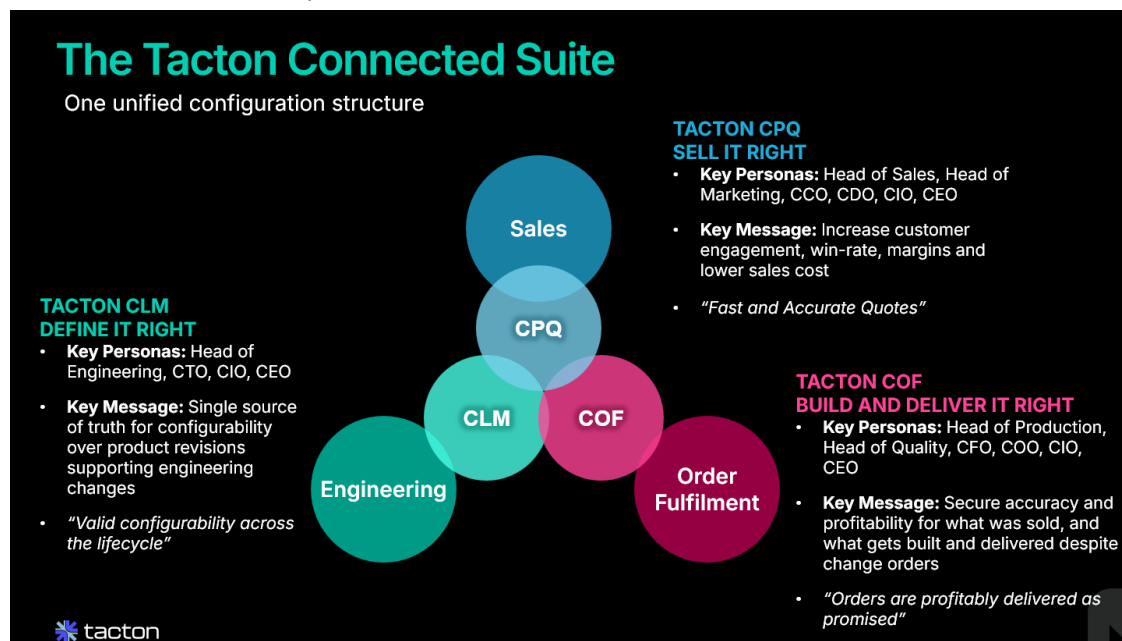
derived structures is defined in the CLM & COF workspace. The actual generation of the derived structures from the 100% EBOM happens in COF.

"Configuration Rule" means an expression in Tacton constraint syntax that is evaluated by Tacton CLM and COF when processing a configuration. Constraints, Selection Conditions and Attribute Assignments are different types of configuration rules used when modeling products in Tacton CLM.

"Configuration Change Package" (CCP) means the container in Tacton CLM that holds all changes belonging to one product introduction or engineering change – items and structures, domains and attributes – and that can be linked to a Tacton CPQ ticket.

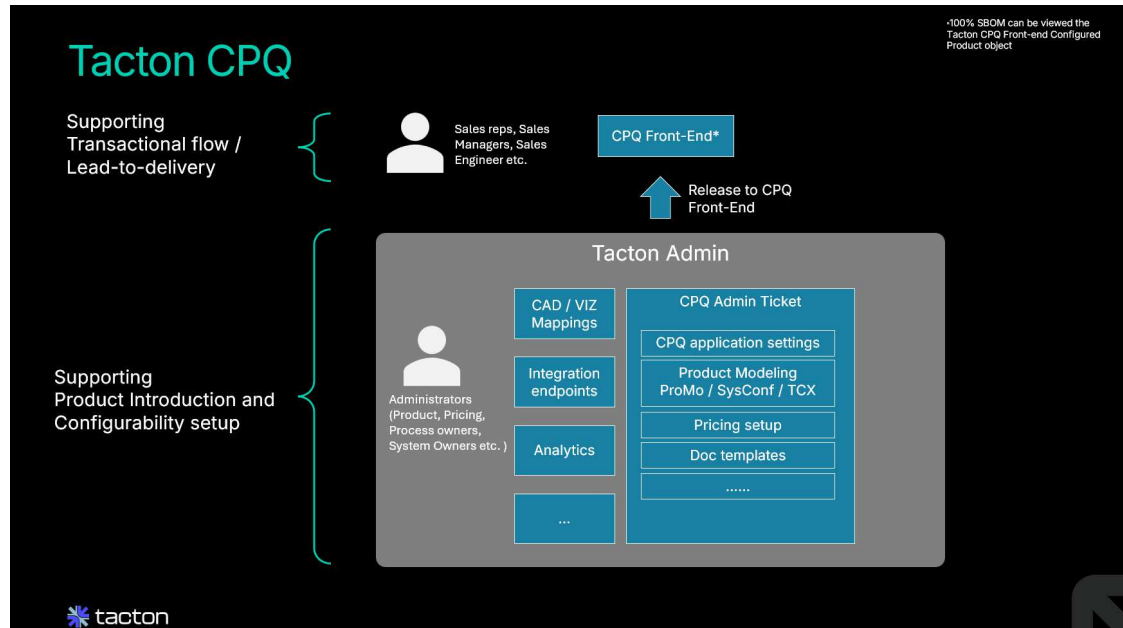
3 Tacton Connected Suite

Tacton Connected Suite consists of three products, supporting different parts of the B2B Manufacturer's business processes:



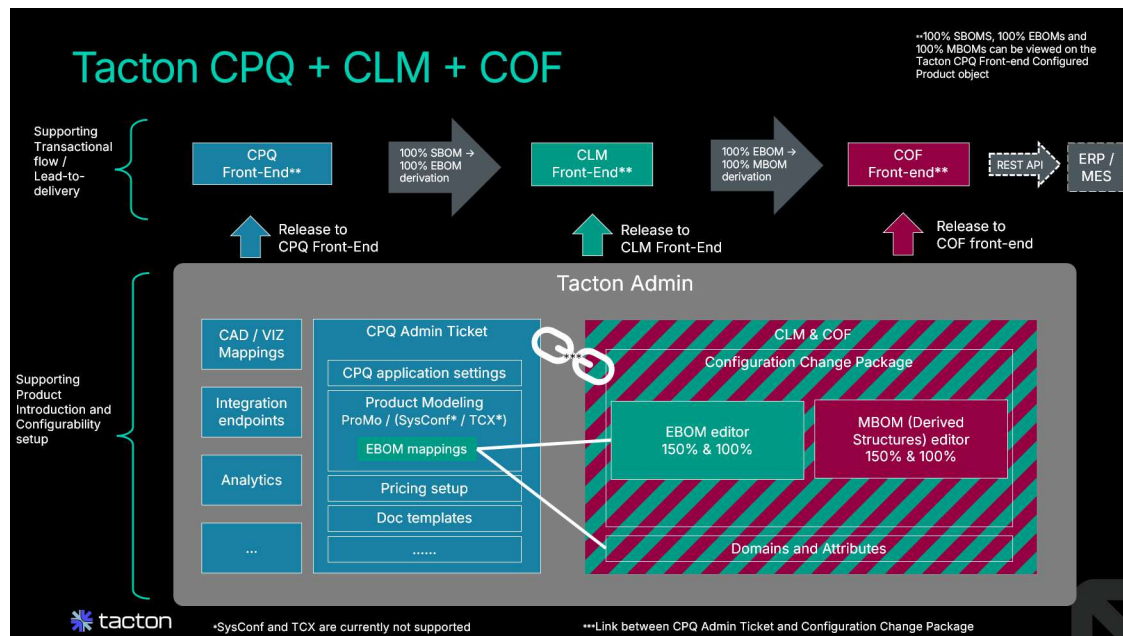
Customers can buy the suite in 4 different combinations:

3.1 CPQ standalone

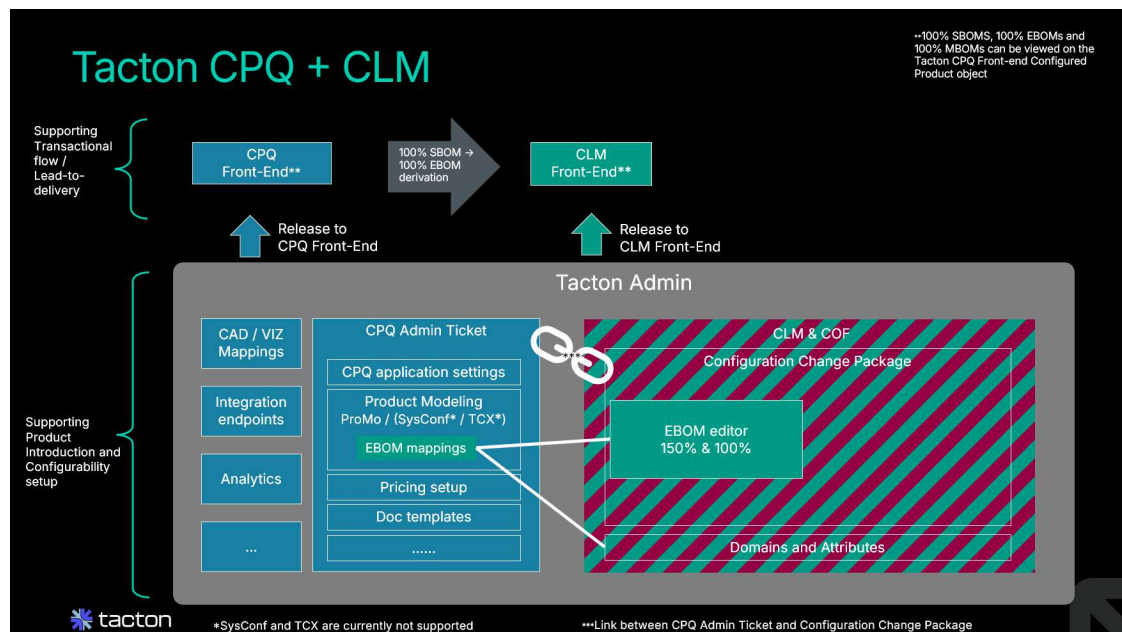


For a Product Description of Tacton CPQ, please visit <https://www.tacton.com/legal-information/tacton-cpq-saas-product-description/>

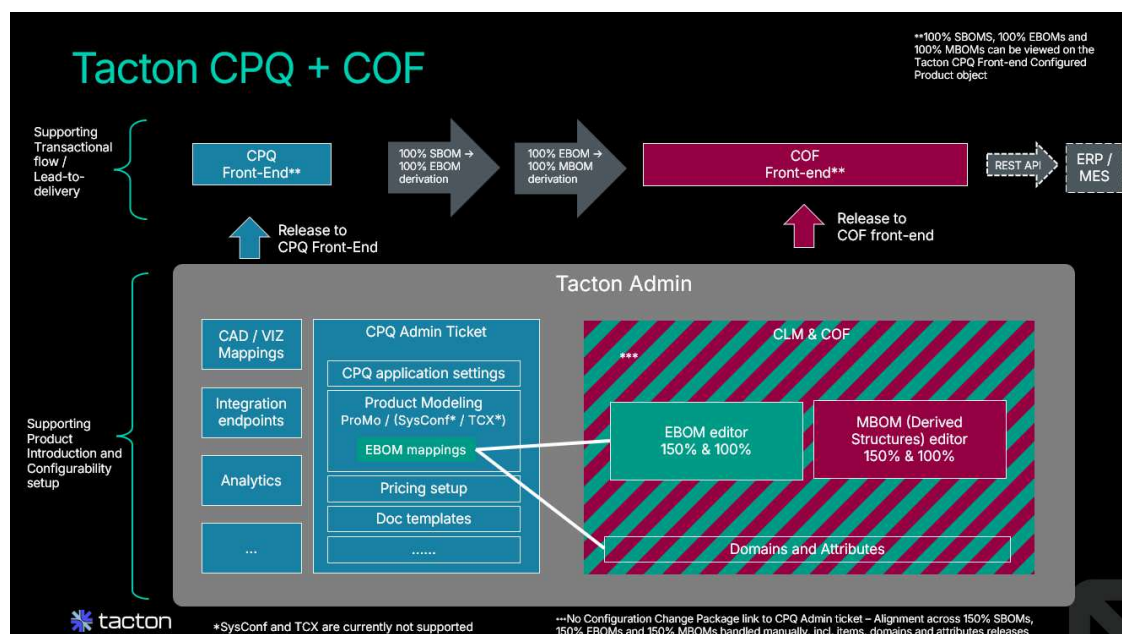
3.2 CPQ + CLM + COF – the complete Connected Suite



3.3 CPQ + CLM



3.4 CPQ + COF





4 Tacton Connected Suite Capabilities

Combined, Tacton CPQ, Tacton CLM and Tacton COF have the following capabilities. For Tacton CPQ specific capabilities, please refer to the [Tacton CPQ SaaS Product Description](#).

4.1.1 CLM and COF workspace

- A workspace for the engineering definition of configurable products, embedded in Tacton Administration (Together with Tacton CPQ Administration).

4.1.2 Domains

- Domain is a named definition of a permitted value set and its data type. Domains are used as a foundation for Attributes.
- Domains are global: several attributes may use the same domain.
- Domains are revisioned. A revision must be released before use in an attribute. Released revisions are immutable; to change a domain, a new revision is created and edited until released.
- Domain definitions are compatible with Tacton CPQ domains – same data types (string, integer, decimal, boolean, enum) and metadata – and a Tacton CPQ domain can be mapped to a CLM or COF domain revision.

4.1.3 Attributes

- Attribute is a named property used to describe items.
- Attributes are global: several configurable items may use the same attribute.
- Attributes are shared across the Tacton Connected Suite, so the same definitions are available for engineering configurability in Tacton CLM, sales configurability in Tacton CPQ and order fulfillment configurability in Tacton COF.
- Attributes are revisioned,

4.1.4 Model structure - 150% EBOM model editor

- Items and item structures: define and maintain the 150% EBOM of a configurable product, including for each position every item that could appear in any offered variant.
- New items are added by fetching them from a connected PLM system (using REST API) or by creating them in the system.
- Item properties and item attributes: describe each item and make it available to configuration logic.
- Item constraints and assignments: author the rules that govern which value combinations of an item's parameter attributes are valid, and compute values of item's own attributes – for example, compute area from width and length.
- Configurable positions with selection conditions
- Engineering configuration logic is authored using the Tacton CPQ ProMo constraint syntax.



4.1.5 Derived Structures - 150% MBOM model editor

- Create derived structures from the EBOM. A derived structure translates the engineering definition of the configurable product into a manufacturing-oriented structure such as an MBOM.
- MBOM profiles: maintain separate manufacturing structures per production facility. Routings, materials and production costs may differ across facilities, and each facility is modeled on its own terms.
- Author and maintain the 150% MBOM model, containing manufacturing assemblies, manufacturing items and MBOM-specific items such as routings and operations.
- MBOM configurable positions with selection conditions
- Map items from the 150% EBOM model to the 150% MBOM model

4.1.6 Engineering-to-sales alignment

- The engineering definition flows to sales by mapping a Tacton CPQ assembly to a configurable item in Tacton CLM. Attributes and constraints are mapped along with it, and Tacton CPQ Administration provides the means to align naming and values where the sales model differs from the engineering model.
- Sales modelers see the mapped engineering attributes and constraints as read-only and build sales logic on top of the engineering logic without changing it.
- The Tacton CPQ ticket coordinates the handover: engineering changes are pulled into the ticket and the mappings updated.

4.1.7 Testing and validation

- Test the configuration directly in the CLM & COF workspace: make selections, validate that technical constraints behave as intended, and generate the 100% EBOM.
- Test the CLM mappings from Tacton CPQ Administration by running the mapped CPQ assembly and generating the Engineering BOM in Tacton CLM.
- Holistic testing: a test manager in Tacton CPQ can test the complete model – sales, EBOM and MBOM – in the ticket test environment, and run the end-to-end process from Opportunity to Quote to Order.

4.1.8 Revisions, change management and release coordination

- Items, domains and attributes carry a released status that governs whether they are available to downstream departments and channels. Departments can work on unreleased product changes and release them to the market in an orchestrated fashion; released revisions are the ones used in the order-delivery process.
- Changes are organized in Configuration Change Packages: the item, structure, attribute and domain revisions belonging to one product introduction or engineering change are created and modified within a single package.
- A Configuration Change Package is linked to a Tacton CPQ ticket, which exposes the engineering changes to colleagues working on the sales model. The extended Tacton CPQ ticket life cycle provides additional ticket states used for engineering.

4.1.9 Platform and Access

- User roles govern access to Tacton CLM & COF functionality
- Regular Tacton product releases directly available in your Tacton SaaS environment
- Help Center and Release notes

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- Access through any standard web browser

4.1.10 Transactional flow – from lead to delivery

- CLM front-end supports the order flow from the 100% SBOM in Tacton CPQ front-end, deriving the 100% EBOM – available on the Configured Product in Tacton CPQ.
- COF front-end derives the 100% MBOM from 100% EBOM – available on the Configured Product in Tacton CPQ.
- List of all processed orders – including SBOM → EBOM → MBOM derivations and execution logs - is available in Tacton CPQ front-end

4.1.11 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 the document *Tacton CLM/COF SaaS – Architecture and Security* which can be received upon request.

4.2 Tacton CPQ + CLM (excluding COF)

If customer purchases CPQ+CLM only (excluding COF), the following Connected Suite capabilities are not available:

- 150% derived structures / MBOM model editor.
- 100% derived structures / MBOM generation or viewing in the transactional processes.

5 Allowances

The Customer's usage of Tacton CLM may be associated with allowances and restrictions described in the Order Form signed between Customer and Tacton.

6 Usage Limits and Fair Usage

To ensure the stability, security, and performance of the SaaS Services for all customers, use of the SaaS 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 SaaS Services.

Such excessive usage may include, for example:

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- 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 SaaS 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 Inactive Customer Data Retention

To ensure stability and efficient use of the Customer's tenants, Customer is encouraged to regularly review and delete data that is no longer needed. Tacton retains Inactive Customer data according to the retention period defined in the Customer's subscribed Product Support Plan.

Inactive Customer Data refers to data that is not actively accessed or used in the Customer's production environment and where the last modification occurred outside the applicable retention period defined in the Customer's subscribed Product Support Plan.

Inactive Customer Data remains stored by Tacton for at least the duration of the applicable retention period.

Inactive Customer Data may include both:

- transactional data (typically stored in the CLM & COF result databases), and
- master data used for configuration and setup (typically stored in the modeling database connected to Tacton Admin and the CLM & COF workspace).