

Document Designer in Oracle CPQ

Document Designer is an integral part of Oracle Configure Price and Quote (CPQ) that dynamically fills current quoting data into a variety of proposal documents with just **one-click**. It enables sales reps, channel partners, value-added resellers, and distributors to easily populate any number of preloaded templates to **generate highly customizable documentation**. That documentation can then be sent to the customer in a variety of formats or via the desired transmission process. The result is a highly professional quote that enhances the value of the proposal and elevates the customer experience.

Each of the unique Document Designer features and capabilities enable you to differentiate your organization's quote from the competitors and provide the greatest level of **governance and control** over your individual terms, conditions, and contracts.

Document Designer is a drag and drop tool for creating and administering document templates. 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.

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

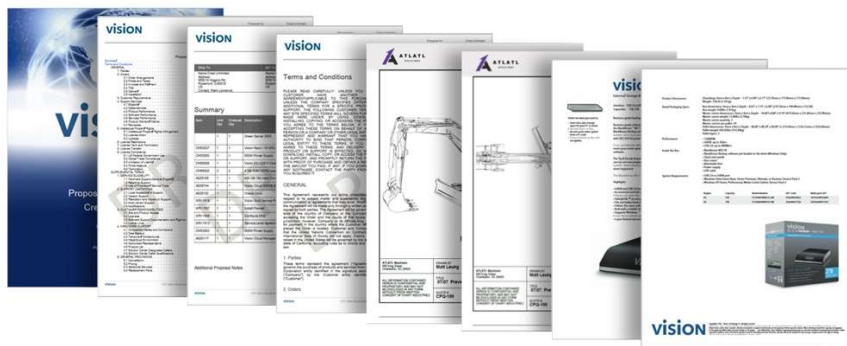


Figure 1: One click documents for the entire sales cycle.

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. 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.

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, including:

1. Select a language in which the document should be generated.
2. Consider user inputs to include or exclude optional content in the document.
3. 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 administrative user controls of Oracle CPQ Document Designer provide highly flexible control over the design, format and depth of information to be provided. Users can create multilanguage proposals with consistent pricing, terms and conditions, formatting, branding, and additional documentation such as fact sheets, system specifications, CAD drawings or 3D visualizations. This assures that information submitted to the customer is professional, precise and accurately represents your company's brand and value proposition.

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



Documents you can generate include:

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

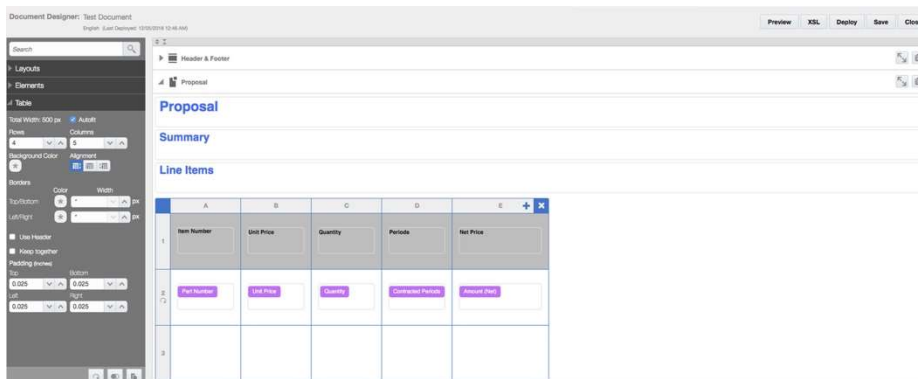


Figure 2: Document Designer's intuitive drag-and-drop interface allows users to quickly familiarize themselves with admin and design tasks.

Document Designer in CPQ has been perfected with enterprise-grade real-world customers across the globe. CPQ product experts used the knowledge gained from years of customer implementations to standardize and simplify the most common real-world use cases in the Document Designer so that you may take advantage of the robust functionality right out of the box.

WHY ORACLE CPQ?

Oracle Configure, Price and Quote (CPQ) provides a flexible, scalable, enterprise ready configuration, pricing, and quoting solution ideal for companies that sell all varieties of products and services across direct, indirect, and e-commerce sales channels. With it, enterprises can optimize complex selling processes for faster sales cycles, improved margins, improved pricing discipline—and ultimately, improved customer satisfaction throughout the sales journey.

Built-in functionality:

- 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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