



e-Con CPQ: Features & Functionality

e-Con CPQ software is designed for companies that sell, produce, and deliver complex goods and/or services, and that use Dynamics AX, NAV, or CRM. Our packaged, highly flexible toolset saves time and money spent on creating offerings, quotes, proposals and orders, calculations, projects, and documents.

This fact sheet offers a technical description of the solution hundreds of businesses are using for advanced configuration. We highlight 31 key capabilities and features, divided into 5 categories:

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User Experience

Adaptable layout

e-Con offers a number of ways to design the Questionnaire or User Interface for a model. Standard controls such as help texts, information, images, scale bars, drop down's and more can be used to create a rich experience.

Users can tailor our standard layouts to accommodate their own corporate identity colors, fonts, styles, logos or build a layout themselves. It's also possible to build multiple layouts for specific customers, business types, industries, and more.

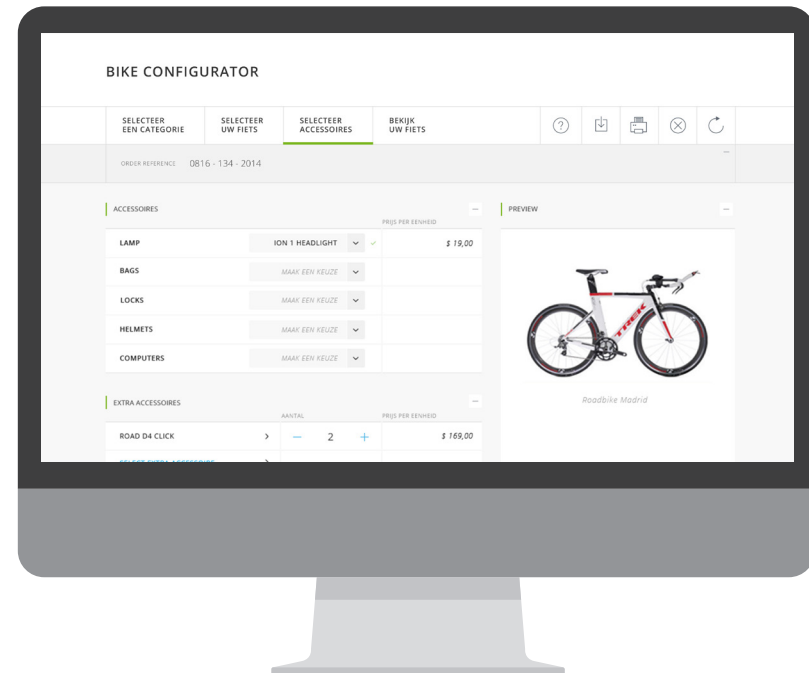
Tabs, panes, and trees display can be used to group questions and features and to easily navigate through the configuration.

Image editor

The Image Editor gives users a graphical, intuitive approach to making selections and entering information such as dimensions. Instead of describing all parts of a product or service, we provide graphical views that enable users to quickly see and better understand all options and possibilities.

UI/UX

e-Con's user interface offers a responsive design based on HTML 5. UI behavior adapts instantly to desktops, laptops, and mobile devices, ensuring a consistent, intuitive experience across



any platform and browser. e-Con offers three modes within responsive design: touch, mouse and mobile.

Visualization

e-Con can dynamically show a composed picture of a configured product or dynamically generate a 2D sketch or drawing. Visualizations update in real time, so users can see immediately how changes affect product design of the product. e-Con also includes tools for developing APIs that let applications 'talk' to each other and share data, so that you can incorporate CAD and 3D software.



End User functionality

Document generation

Documents can be created for any purpose using configuration information, and printed in Microsoft Office Word, Microsoft Office Excel, PDF, CSV, TXT, and HTML formats. Create documents such as quotes, order, contracts and more, using logic to add text blocks or hide content based on the document's purpose and reader's role.

Setup, storage, and versioning for Microsoft Offices templates is fully integrated with the e-Con Studio. You can count on fast, error-free template setup with an intuitive wizard and testing tool.

Attachments

In e-Con, attachment functionality is completely integrated with standard document handling in Microsoft Dynamics. e-Con users can attach any document or file to a configuration with assurance that it can be attached to any record in Microsoft Dynamics.

Configuration analyses

Configuration features and options can be stored in Microsoft Dynamics for analyses. Configuration analyses help users turn that data into information that helps planning, strategy, operations, and more. Users select attributes for analysis in e-Con Studio, and then work with menus in Dynamics to create, store, and re-use queries in other analyses.

Configuration templates

Predefined configuration templates can be created and stored, improving efficiency and accuracy. e-Con supports common, user-specific and customer-specific templates. When e-Con is used in Microsoft Dynamics ERP or CRM, the system first checks for existing templates and brings them up if available. Selection options enable users to work with an existing template or start from scratch.

What-if

What-if functionality keeps track of how changes impact a configuration, especially when a model is complex and has many dependencies. Users can see the effects of changes before finalizing them, and then choose whether to confirm or cancel the changes. They can also decide when the functionality will be shown and what values will be presented.

Intercompany support (Dynamics AX)

e-Con fully supports Microsoft Dynamics AX's intercompany functionality. Based on the company type (sales or manufacturing) e-Con knows what data needs to be stored in Dynamics AX. For example, sales companies usually do not need BOMs and routings, while manufacturing companies do. Intercompany support includes auto-reconfigure and BOM / routing creation during the AX intercompany sales order



creation into the manufacturing company. e-Con also supports dynamic sourcing from different AX companies for costing and pricing information.

User roles and context

e-Con can act differently based on the user role or context it's used from. Role information can be obtained from Dynamics, Active Directory, or Windows. Context information is used, for example, to determine if e-Con is used internally or externally from the web. Depending on context and/or role, logic can be executed, information can be hidden or made visible, and certain constraints or validations can be (de-)activated. For example, options such as cost price can be visible or hidden for internal or external use.

Multilanguage capabilities

Configurations can be displayed, opened, and printed in several languages. The e-Con Studio is equipped with label management that enables quick activation of labels for translation. Additional translations can be added from external sources using Office Excel export/import capabilities.

Temporary save

Users can temporarily save incomplete configurations. For example, a user may need to finish the configuration at a later time, or needs more information to complete the configuration. The next time the user runs the configurator, an alert will remind him that he's saved an incomplete configuration.

Pricing

Prices are maintained in the Microsoft Dynamics database or other external database, not in e-Con. However, pricing rules, discount rules, and logic are stored within the configurator. For example, the configurator will apply a specific upcharge, but the actual pricing is pulled from Dynamics pricing tables. Actual pricing can also be obtained from Dynamics using pricing logic such as trade agreements in Dynamics AX. e-Con offers flexibility for pricing method; cost price plus and feature-based pricing are just two of many possibilities.

Matching

e-Con has the ability to check if a certain configuration has been made before, and reuse this configuration instead of creating an identical one. This matching functionality avoids redundant data.

Versioning

Users can make straight modifications to configurations or first make a new version of the configuration, and then make changes to and save the new version. Users can then choose what version of a configuration they want. Once the version is selected, e-Con will make it active and update the information in Dynamics. The engine supports (re)-configuration processes, including checks on new model versions.



Deployment

Offline capabilities

The Offline Client application can run offline on portable computing devices, equipping salespeople to work effectively with e-Con if they're not connected in real time with Dynamics. Offline Client can be installed on a laptop in minutes, and if a salesperson does need to go offline, they'll work with the latest information and updates available, in near real-time. As soon as they reconnect with the server, all data synchronizes automatically across e-Con and Dynamics.

Online capabilities / Portal

Self-service capabilities via the e-Con Portal deliver support 24x7 to your customers, business partners, and sales force, regardless their location. Users with appropriate access rights can also create quotes within the e-Con Portal and then push them to Microsoft Dynamics after approval. Configurable portal functionality includes the ability to:

- Verify quotation status
- Review configurations
- Create, manage, and generate documents
- Select, copy, and create new versions

Online capabilities / e-Commerce

e-Con can be easily used together with an e-Commerce platform such as Sana Commerce or Magento. As part of a web shop experience, customers can tailor and personalize standard offerings with e-Con. Once the configuration is finished, e-Con will close and the web shop basket is updated with all necessary information. Purchased and payment of goods can then be done through the web shop.



Technology & Architecture

Dynamics embed

e-Con Solutions' complete focus on Microsoft Dynamics equips us to work as closely as possible with Dynamics AX, NAV, and CRM. All critical e-Con functionality is embedded in the Dynamics application, with data accessed in real time from Dynamics. Because e-Con doesn't use a proprietary database, there's no need for manual uploads or complex data replication and synchronization.

e-Con also utilizes Microsoft Dynamics metadata. Metadata exposes the Dynamics data model to e-Con, so users can read and write in all Dynamics tables and entities.

Architecture

e-Con is built with and on the Microsoft .NET Platform and is written in C#. The e-Con configuration models are model-time stored as XML documents. Run-time the configuration models are compiled to C# assemblies. Configuration results are also stored as XML documents. Web services enable back-end connections, and include native Dynamics AX, Dynamics NAV web services, as

well as OData web services for Dynamics CRM. Access is simple, with no bound on local computers via web services and Azure. Logging can be via credential Windows Authentication, Azure Active Directory Authentication or Claim-based authentication.

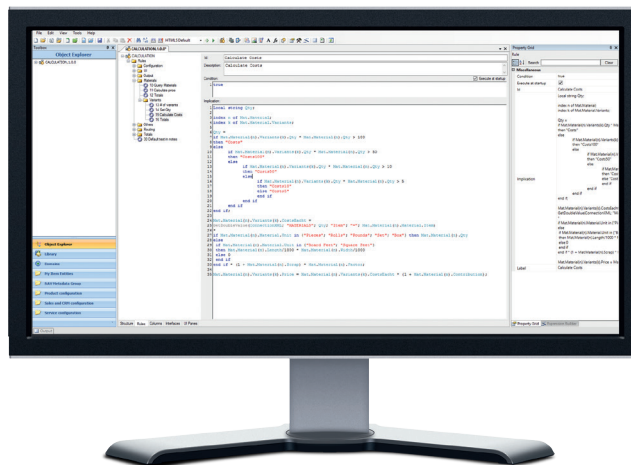
Declarative Rules Engine

A declarative rules engine automatically checks related business rules, constraints, and calculations when a parameter or question is changed. Users are not bound to a certain, directional, sequential flow of questions, so they can start at any place in the configurator questionnaire. Modelers don't have to think within a rigid order for building rules, calculations and

constraints because the rules engine doesn't lock them into a specific direction. You can start at any point in the process with the assurance of accurate results.

External data sources

Though e-Con is designed to work flawlessly with Dynamics, it's database-independent and can use data from almost any source, from a Microsoft Excel spreadsheet to a comprehensive Microsoft SQL Server database.



Design Functions

e-Con Studio

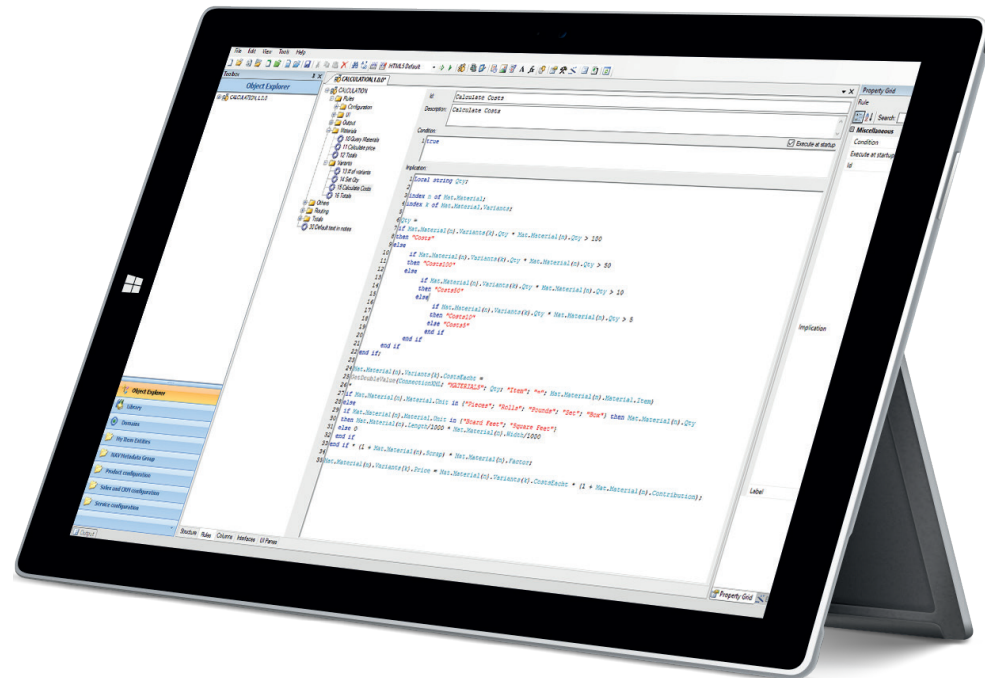
Users can construct models and business rules, simulate created models, and build models with reusable sub-models. The Studio's intuitive, graphical environment includes drag-and-drop, syntax coloring, syntax checks, wizards for common tasks and many tools for efficient error finding. The studio is designed to enable users to add logic without deep programming expertise. Along with built-in wizards and support, e-Conpedia offers a rich online information source for modelling and maintaining e-Con, including a lot of 'how to's.'

e-Con Studio wizards

Formula Wizards makes the design and setup of logic much easier. Wizards are available for setting up dependencies in a matrix or tree, adding constraints, adding functions and data queries.

e-Con deployment

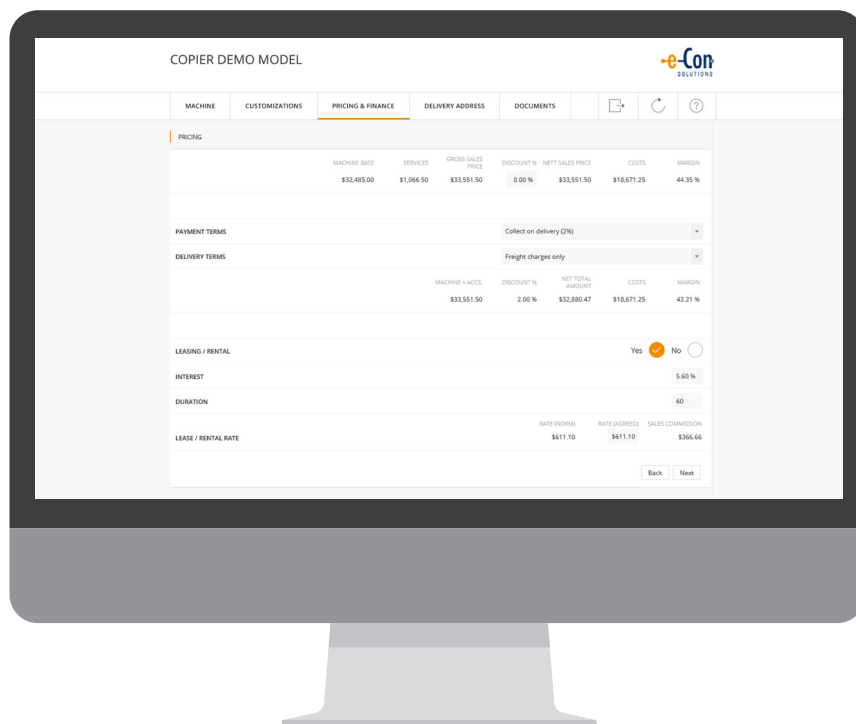
e-Con allows you to create separate environments for deploying, using, and testing models. Import/export capabilities make it fast and easy to move models from one environment to another. Capabilities include mass and scheduled deployment and compilation of models; for example, a compile can be scheduled for night hours.



e-Con debugging, logging and tracing tools

For admin users, various tools make error finding easy and efficient. The debugger within the e-Con Studio allows admin users to step through a configuration model to view the value of properties and variables and set and run to a breakpoint. The How-Why tool allows admin users to analyze all aspects of a running configuration. Various tracing and logging tools can be activated, tracing aspects such as rule execution, communication to Dynamics, engine state, and more.





Decision matrices / Decision tables

Decision matrices live in Dynamics ERP and offer an easy way to maintain logic. To include or exclude options in e-Con, all you need to do is select cells in Dynamics, just as you would with Office Excel, after initial setup of logic in the e-Con model. And since this lives in Dynamics no additional knowledge of e-Con is required.

Sub-models

The object-oriented architecture of e-Con allows the configurator to exist out of several sub-models. The benefits of working with sub-models include speed, easy maintenance, and re-use. Sub-models can be used as an integrated part of a configuration or they can run in a pop-up window, as a separate configurator.

Model lifecycle management - versioning

The ability to work with versions for configuration models is essential to accurate model lifecycle management. With e-Con, changes can be added to a new version and once approved, that version can be made active. In addition, differences in versions can be analyzed with a comparison tool available in the e-Con Design Studio.

Check-out / Check-in

Efficiently maintain configuration models in multi-modeling user environments with check-out/check-in functionality. Check-out and check-in tools enable a user to check out the model they want to modify. When a model is checked out, a local copy is created. The server version is read-only, preventing versioning issues. After the modified model is checked in, other users can check it out to add changes if needed.



About e-Con Solutions

- ✓ Working on Microsoft Dynamics since 1999
- ✓ Global ISV Serving 25+ Countries
- ✓ Experienced Microsoft Dynamics Team
- ✓ Microsoft Gold Enterprise Resource Planning Partner
- ✓ Microsoft Silver Application Development Partner
- ✓ Certified for Microsoft Dynamics

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