Output Documents: Basic Theory Transcript

Quoting is the goal of any CPQ system.

This course will… review the theory of how quotes and other documents are created as output documents.

Distinguish between the two starting points for any output document: the quote or the configured product.

Discover the best place to build these documents, either in the cloud or on your company's servers

Objectives

- Output Documents Theory

- Output Builders

Output Documents Theory

Output Documents are files (such as a Word document or CAD drawing) created by placing the data found in a quote or configured product into a template file.

These output documents can be used directly, or they can be combined to create more complex documents, such as ZIP archives or multi-page PDF files

For example, a multi-page quote PDF could consist of a bill of materials (from a MS Word template), an engineering drawing (from a SolidWorks template), and an existing terms & conditions PDF (stored on your corporate website). All bundled together into one custom PDF.

One quote or configured product can generate many documents for different people. Each document can be tagged so it's visible to different user roles.

Files can be saved in various formats: 25 different ones so far, from JPG to EPUB.

And each file can be stored in the best place for your business.

A private shared drive or ePDM system in your own corporate network. Ideal for sensitive CAD drawings that must be stored for compliance.

A secure cloud URL in Epicor CPQ, visible to only the right Epicor CPQ users. This is ideal for the PDF quote they must review and approve.

A public cloud URL in Epicor CPQ, visible to anyone who is given the unique path. This is ideal for a JPG image of the customized product you want your customer to be able to share on social media.

You decide what information is shared, which format, and to whom.

Here's an overview of different types of output documents you can create. Click next to proceed.

Output Builders

Epicor CPQ can generate CAD files, Excel charts, PDF documents, images, and even e-books. These documents are created by an output builder – a program that follows the rules and templates you've designed to create the document.

By having an output builder create your document, your customers need no special software installed on their computer or smart phone. The output builder points their web browser to your configurator, and configure, price, visualize, and quote.

Two types of output builders are available to generate your documents –cloud builders and local builders.

Cloud builders are maintained in the cloud by us, and are always available. They require no maintenance from you.

Local builders, which you have the option to install on your own company servers, are maintained by you.

Usually, our cloud builder is all you need. It can generate over 23 different types of documents.

However, if you need to create a CAD drawing, you'll need a local builder. CAD drawings are made by your licensed copy of Creo, SolidWorks, Autodesk, or Inventor.

For everything else, we suggest using our cloud builder

Recap

In summary, we discussed

- the theory of how quotes and other documents are created as output documents

- And the best place to build these documents

About Epicor

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