



CAS Merlin CPQ

From lead to excited customer



CAS Merlin CPQ for customer-focused sales journeys

In the digital age of sales 4.0 and digital customer journeys, customers search for custom solutions and an eventful product selection. The development cycles of product innovations become shorter, and, thus, new product variants are created in the blink of an eye. As a result, the sales process becomes increasingly complex, especially for companies with already variant-rich product landscapes.

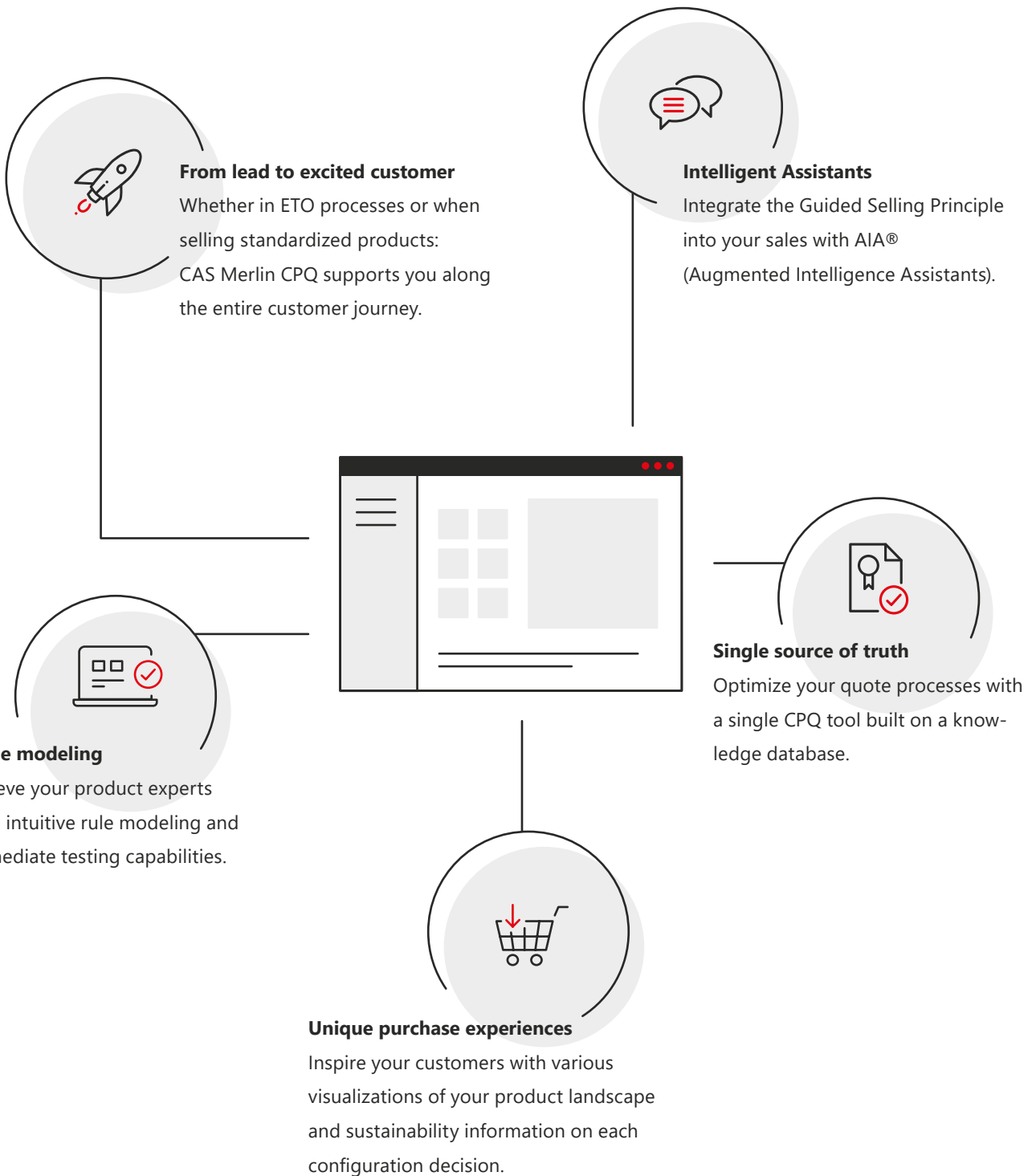
Our goal is to simplify your quote and sales processes and create unique customer experiences. With CAS Merlin CPQ, you excite your customers with quick quote creation, custom configurations created in real-time, and a seamless Customer Journey. Thanks to the intelligent assistants in CAS Merlin CPQ, your leads will develop over time from enthusiastic customers into fans.

As an experienced provider of CPQ systems for large customers and SMEs, we have been successful in this sector for 30 years and offer a sectorally unrestricted and internationally proven solution. We will meet you at eye level and gladly apply all of our years of experience to implement your CPQ project. From the concept to the implementation to going live and even further beyond, we are here for you.

Let's solve your challenges together, elevate your business to a new level, and excite your customers for your long-term company success. We are looking forward to working with you.



Your benefits with CAS Merlin CPQ



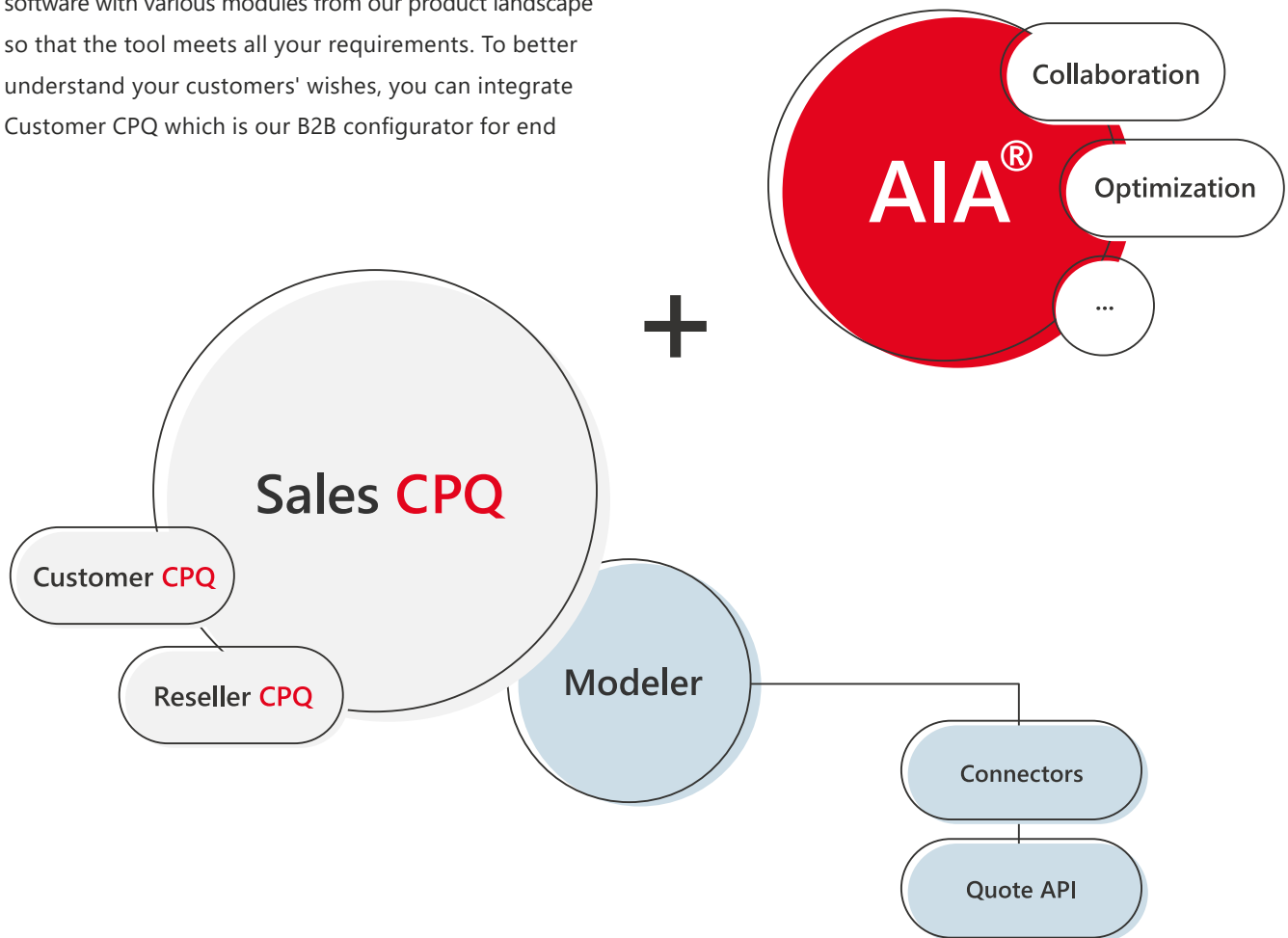
Maximum freedom for all requirements of your company

With CAS Merlin CPQ, you put together a CPQ + AIA® solution that is optimally tailored to your needs. CAS Merlin CPQ serves, on the one hand, as an interface between product experts and sales and, on the other, as an interface between sales and end customers.

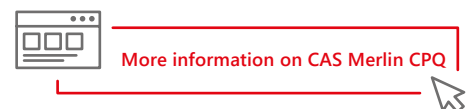
The basic module is Sales CPQ, which is the main module your entire sales force works with, and on which our CPQ solution is based. Furthermore, you can extend your CPQ software with various modules from our product landscape so that the tool meets all your requirements. To better understand your customers' wishes, you can integrate Customer CPQ which is our B2B configurator for end

customers in addition to the basic module. This way, you can fully utilize your online and offline sales channels and create a seamless and consistent customer experience.

Moreover, various intelligent assistants (Augmented Intelligence Assistants, AIA® in short) are available to you. With these assistants, you can make your sales process more transparent, faster, and more customer-focused.



● CPQ Frontend ● Assistants ● Technical Backend





» The CPQ solution not only eases and simplifies the entire quote process but also ensures that all involved always stay informed about the current project status, and any knowledge transfer is modeled completely. «

Marcus Schlichting,
Marketing & PR at BAVARIA YACHTS

Sales CPQ

Consistent digital sales processes

With Sales CPQ, you optimize your sales processes: the tool supports you in every phase of your individual customer journey, whether this be first contact at the beginning of a project, the configuration of the optimum customer solution, or part of the cross-selling process. You can quickly find your custom solution that meets the needs and requirements of your customers in our vast product landscape. Thus, your initial contacts become qualified leads and then excited users or even fans.



From prospect to fan

Thanks to Customer Centricity contacts become excited customers



Digital customer journey

Relevant touchpoints along the customer journey are mapped digitally

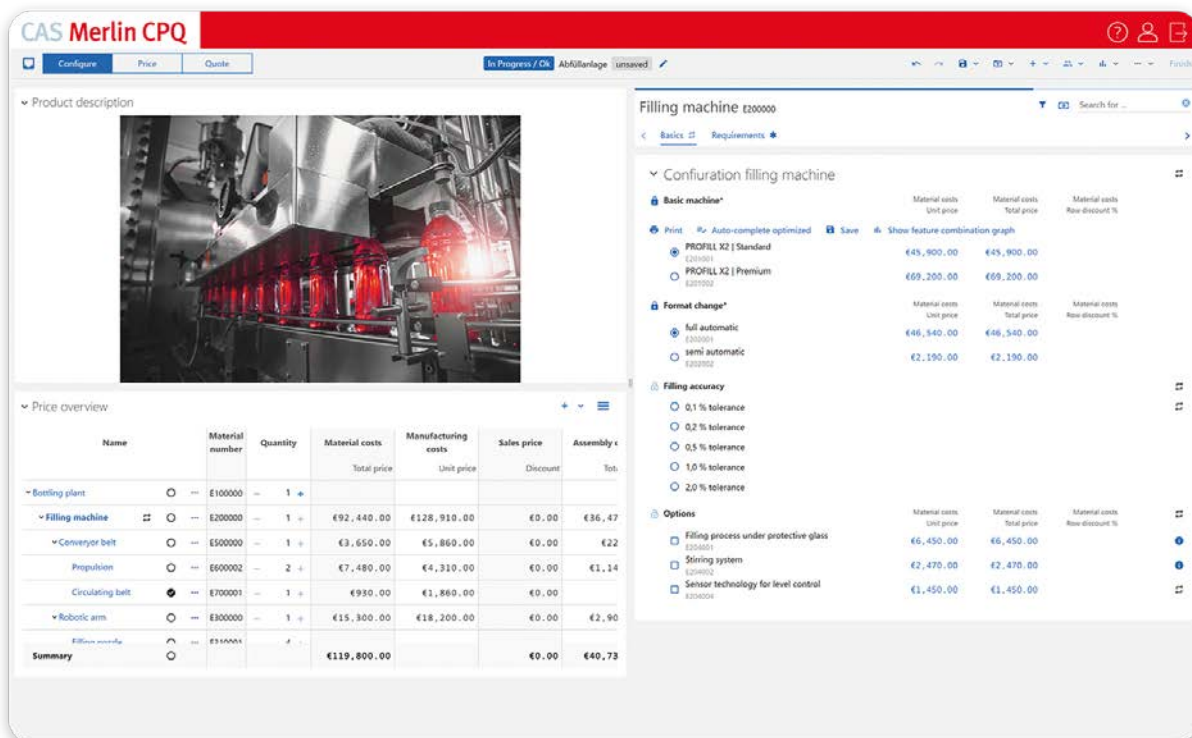


Smart assistants

With intelligent guided sales, you can make the most of your sales processes

Elevate your sales efficiency to a new level

- ✔ **Smart guided selling processes**
 Smart suggestions support during quote configuration. By leveraging guided selling, sales can increase their efficiency which means more time for managing leads.
- ✔ **Clear processes - all leads in one inbox**
 The inbox offers sales teams clarity and simplicity by pooling all leads and current requests, as well as details on the responsible sales expert in one place accessible to all.
- ✔ **Integrated feasibility check**
 The automatic comparison of the valid set of rules with the quote configuration prevents Invalid quotes or product solutions.
- ✔ **Transparent order calculation**
 With a transparent view of prices and calculations, you can display the purchase, sales price, and margin of your products at a glance.
- ✔ **Up-selling and cross-selling functions**
 During the configuration process, you can program the system to show you any suitable product extensions and optional extras, such as special accessories.
- ✔ **Consistent quote process**
 Thanks to intelligent sales management, you can break up data silos, and your customers are guided through every phase of the customer journey according to their needs.



▲ Use Sales CPQ to gain and keep an overview of all product information



AIRBUS

*» The Airbus Upgrade Configurator
from CAS Software AG enables us to lead
Airbus forward. «*

Jerome Javelle,
Head of Design Office at Airbus



Customer CPQ

The online configurator for generating leads

Using Customer CPQ, you can extend your sales journey to include an additional point of sale. With the intuitive online configurator, customers can discover your product range in advance and pre-configure their desired products. And, thanks to the intuitive user guidance, they can experience their first touchpoint in the form of a fantastic customer experience, which connects seamlessly to a consistent and easy sales process.



Emotional point of sale

The end customer finds a suitable product directly through the impressive online user interface



Consistency through all phases

Systematic recording of all data and requirements from first contact to placing an order

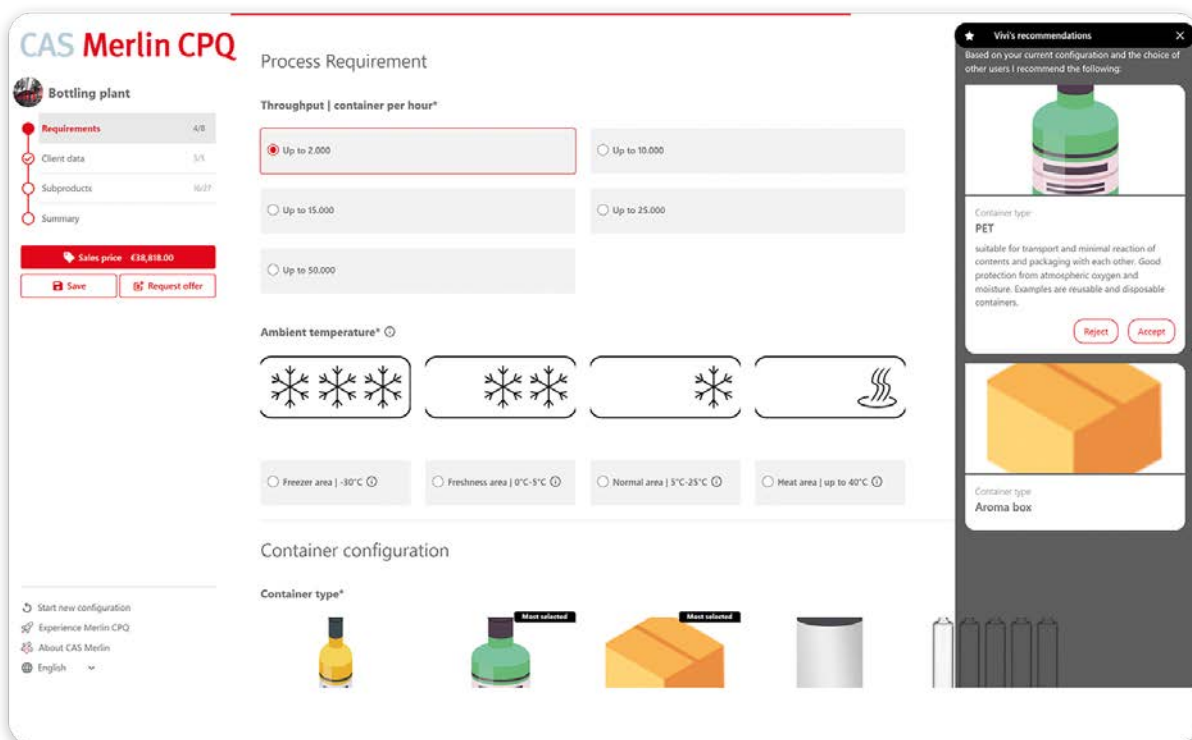


Pre-qualification of your leads

Qualified leads thanks to intuitive user guidance through your product landscape

Elevate customer excitement to a new level

- ✔ **Emotional product presentation**
Make your product tangible and help your customers to understand how their own requirements can be implemented.
- ✔ **Efficient pre-profiling**
When using Customer CPQ, you can qualify leads. Your end customer recognizes online directly whether your solutions and their requirements will be a good fit.
- ✔ **Convenient shop integration**
Provide your customers with a central platform including all necessary functions and, thus, create a consistent customer experience.
- ✔ **Guided selling or product finder**
Guide your end customers through your product landscape with guided selling methods or let them filter for the perfect product that fits their requirements.
- ✔ **Automatic transmission of requests**
Enable your customers to contact you directly from within the configuration - all while providing them with their dream configuration.
- ✔ **Clear visualization options**
Make your product landscape more tangible with 2D visualizations and 3D models. Excite your customers with dynamically generated images.



▲ Intuitively guide your customers through your product landscape with Customer CPQ

Modeler

Smart manager for your product experts

With the Modeler, you model your entire product landscape in one central knowledge database for your company - intuitively and agilely, without any programming skills. The entire team works with the current product portfolio anywhere and anytime. Thus, ensuring error-free quote generation, smart product structures, as well as quick sales processes.



Uncomplicated scalability

Powerful technology for perfect scalability in your set of rules



Agile modeling

User-friendly rule modeling with immediate testing options



Central knowledge base

Transparent knowledge thanks to centrally stored data

Elevate your data transparency to a new level

✔ **A central knowledge database for your company**
 Manage your entire product knowledge including logics and dependencies at one central location - transparently and intuitively.

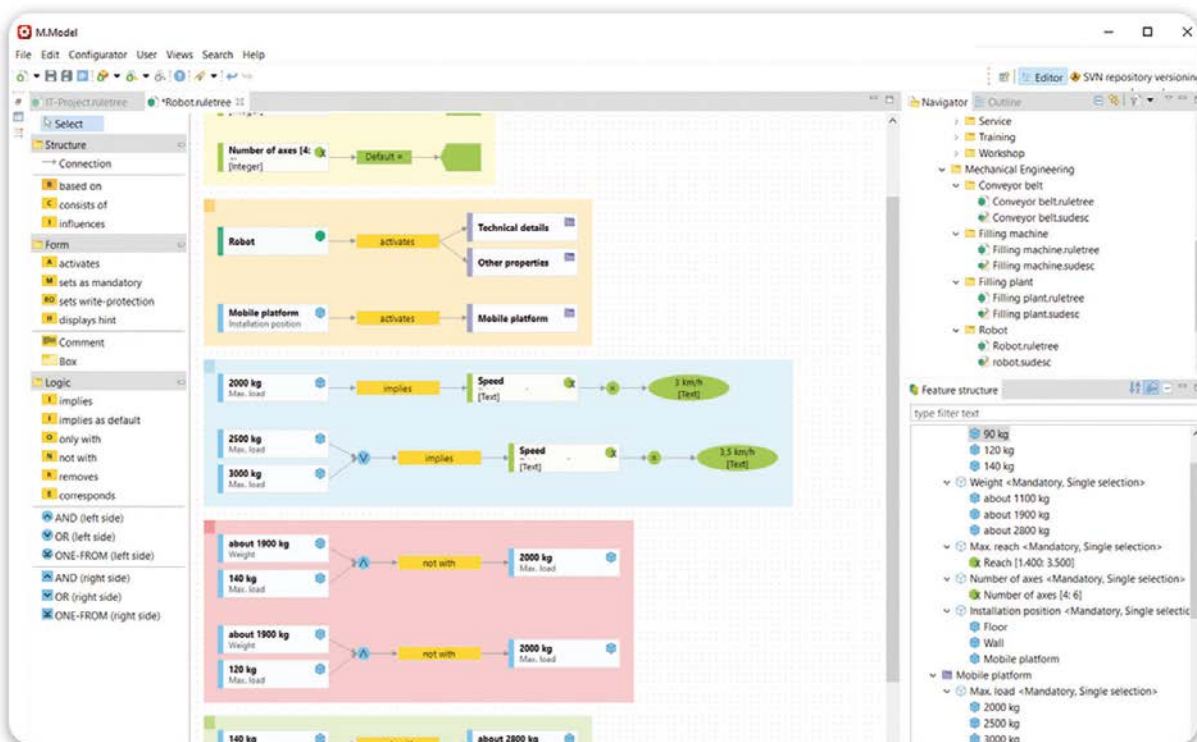
✔ **Graphic or tabular rule modeling**
 Model your set of rules graphically or use the tabular rule modeling functions.

✔ **Model templates, images, and texts**
 Create extremely flexible document templates containing rule-based diagrams and texts.

✔ **Standard connectors to import data**
 Avoid handling data twice and import product data securely into your modeling software from third-party systems, such as ERP, PLM, or CRM systems.

✔ **Test sets of rules immediately**
 Easily adjust your set of rules anytime and check new rules in real time.

✔ **Automatic logic check for sets of rules**
 Invalid product combinations during modeling are impossible with the automatic logic check.



▲ Use the intuitive rule modeling without programming skills

Merlin Core

The powerful calculation core

Merlin Core, the powerful calculation core by CAS Merlin CPQ, comprises all the technical basics of the CPQ + AIA® solution and, above all, manages the huge set of rules in which all the dependencies, feature combinations and modeling data are stored. Merlin Core uses the so-called SAT algorithm for fast rule set calculation. Thereby, any changes to the configuration rules are immediately available.



Quick calculations for your set of rules

Benefit from the powerful performance of the DPLL-based core solving logical satisfiability problems



Custom-fit solutions

Generate custom-fit configurations at optimal cost using the best-fit search algorithm



State-of-the-art technology

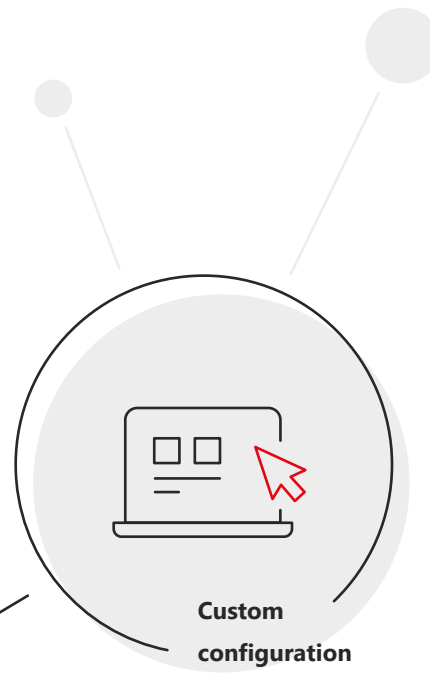
Trust in the efficient algorithms of modern computer science and in the continuous optimizations by experts worldwide

The basis for quick scaling

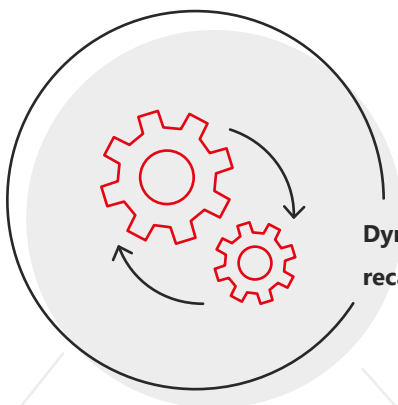
SAT solving

An intelligent DPLL algorithm that dynamically recalculates each configuration without any complex pre-calculations and according to the satisfiability principle is the basis for the SAT solving.

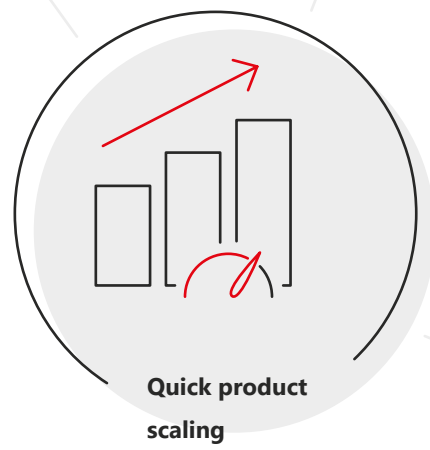
Your benefit: powerful performance when analyzing product configurations and the recommendation of only valid product solutions in a matter of seconds.



Custom configuration



Dynamic recalculation



Quick product scaling

i Background info and benefits

The DPLL algorithm was developed during the 1960s and to this day remains one of the most efficient algorithms of modern computer science. Experts worldwide are continuously optimizing and developing the algorithm.

Thus, the heart of Merlin Core always remains powerful and is the leading configuration technology for your variant-rich products.

AIA® Optimization

Sales 4.0 in practice

AIA® Optimization takes customer requirements into account and configures the perfect quote. In the process, the smart module works based on deep learning and supports guided selling processes. The intelligent assistants enrich user knowledge and contribute to the ideal configuration with comprehensible suggestions. AIA® Optimization supports sales teams no matter how complex the product or how variant-rich the product landscape is.



[More on AIA® Optimization](#)



AI in sales

Sales are enriched by adding knowledge on the best possible variants



Digital sales 4.0

Define customer wishes as parameters and configure precise quotes



Customer Centricity

Ongoing insights into customers and products ensure excellent service

Elevate your sales processes to a new level

✓ Sales with Vivi, the digital assistant

Not only do the users keep on learning, but assistant Vivi also continuously increases her knowledge through daily engagement: the configuration data provides Vivi with insights into your customers and their requirements. Your sales teams receive valuable insights into real requirements.

✓ Clearly structured dashboards

Which product variant is configured the most? What combination of options is the most economical? Using the charts displayed on the dashboard, you can keep an overview of your configuration data anytime.

✓ Visible sustainability for variant-rich products

GreenConfiguration visualizes the sustainability of variant-rich products and complex services. Thus, your sales teams can configure the ideal and most sustainable product variant while the users can compare the environmental impact of different components.

✓ Customer Centricity with multi-criteria optimization

Use Sales 4.0 to make your customer journeys even more customer-centric. Thanks to multi-criteria optimization, you can customize your products and quotes to meet customer requirements.

The screenshot displays the CAS Merlin CPQ interface. On the left, a 'Price overview' table lists various components and their costs. On the right, a detailed configuration view for a 'Special width conveyor belt' is shown, including a definition, a price approval status, and an engineering approval status.

Name	Material number	Quantity	Material costs	Manuf cc
Total price				
Botling plant	E100000	1		
Filling machine	E200000	1	€48,090.00	€85
Conveyor belt	E500000	1	€2,310.00	€4
Propulsion	E600002	2	€4,800.00	€2
Circulating belt	E700001	1	€930.00	€1
Robotic arm	E300000	2	€41,020.00	€23
Filling nozzle	E310001	4	€2,560.00	
Special width conveyor belt	E000000	1		
Packing station	E400000	1	€4,700.00	€4
Robotic arm	E300000	2	€26,000.00	€15
Grapple	E310002	1	€4,520.00	€2
Summary			€134,930.00	

Special width conveyor belt

Definition

Description*
Special width conveyor belt

Description*
The customer wants the conveyor belt in the width 150cm. The specification can be found in the attached description.
! We need a first cost indication till tomorrow.

Add specification documents to configuration

Price approval*
Approval pending > Rejected > Approved

Engineering approval*
Approval pending > Rejected > Approved

▲ Enhance your sales by providing knowledge on the best possible variants using AI

AIA® Collaboration

Workflow manager for all stakeholders

AIA® Collaboration connects different levels of knowledge, reconciliation results and the needs of many different stakeholders in one tool, so that everyone involved in the quotation process is fully informed and up to date. Whether sales team, technical review, legal department, or end customer - all areas are connected and benefit from digital and interactive communication through individual workflows.



[More on AIA® Collaboration](#)



Preventing knowledge silos

Transparent digital workflow management with all stakeholders



Time-saving & continuous

Reduce the necessity for follow-up actions and the gathering of customer feedback or queries



Interaction with end customers

Interactive quote generation together with the customer - collaborative and fast

Elevate your collaboration to a new level

✓ Collaborative and networked

The great advantage of using AIA® Collaboration is the high transparency and consistency of information flows: all stakeholders involved have access to relevant documents, such as quotes. The various departments work interactively with potential customers on the digital quote.

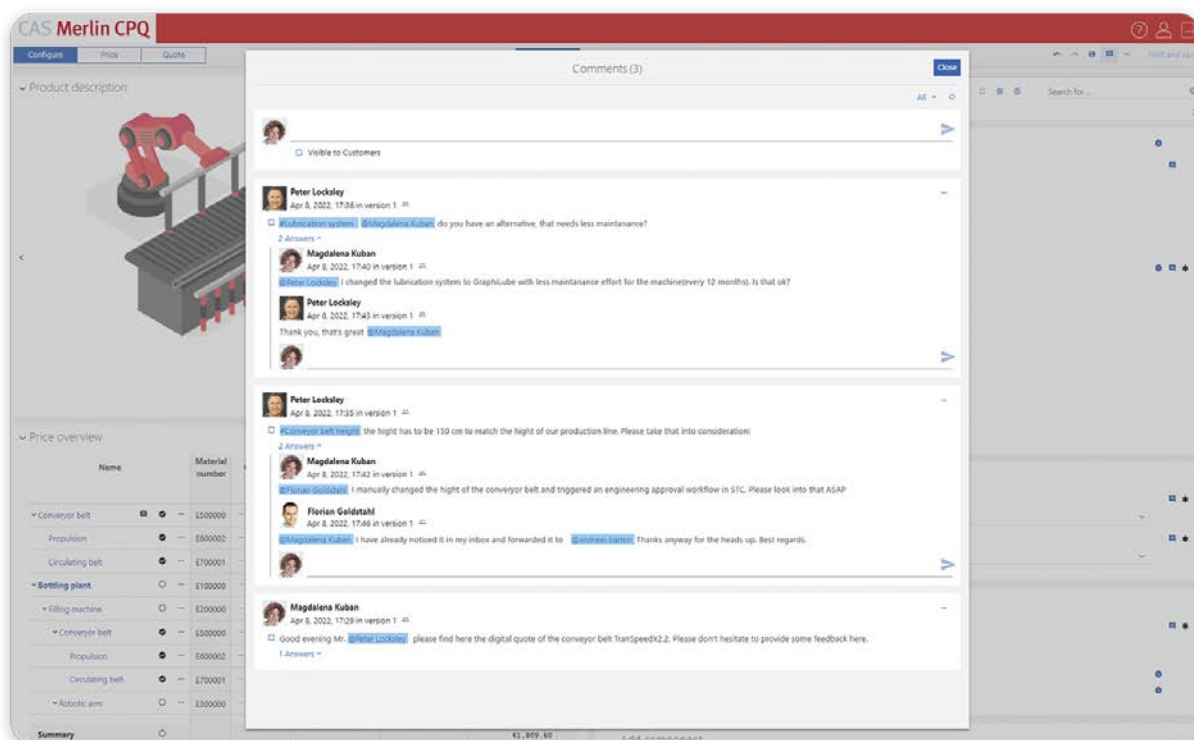
✓ Extended inbox with quote status

In the inbox, your current quotes are clearly listed at a glance. For each quote, current agents and status can be viewed directly.

✓ Transparent workflow management

Small but relevant details can easily be lost during communication processes. This makes it all the more sensible to comment on them visibly for all those involved in the process and to document all workflows digitally.

AIA® Collaboration makes this possible. It also enables you to digitally manage approval, discount, and feasibility workflows.



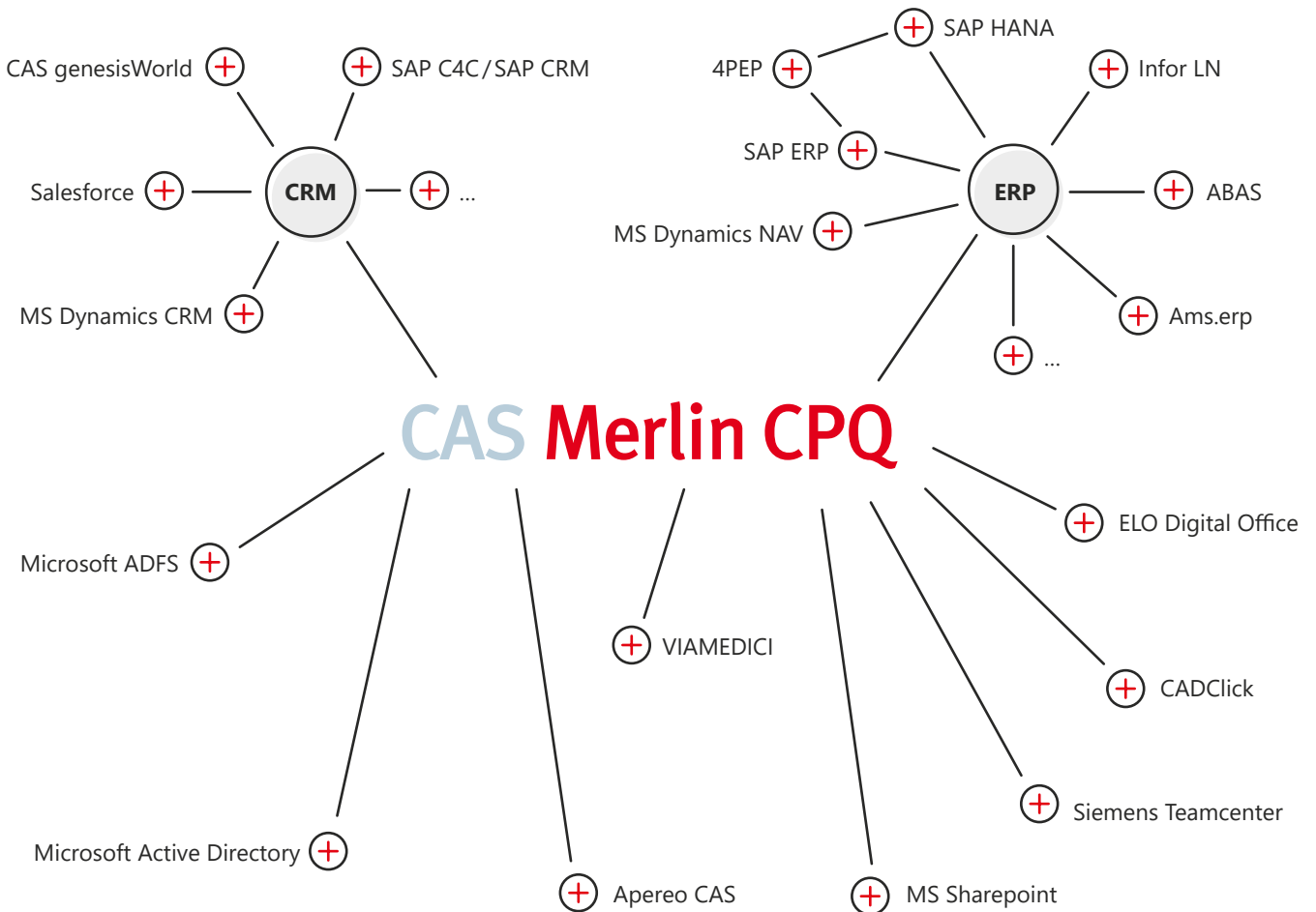
▲ Efficiently comment and document your workflows

CAS Merlin CPQ as the link

for your sector-specific interfaces

You need a powerful CPQ solution as a link between the different IT systems so that master data from, for example, an ERP system can be fed into the configuration, you can easily generate bills of materials, and you can establish seamless after-sales processes.

With its long-term practical application, tried and tested connectors, and an open system architecture, CAS Merlin CPQ can be customized flexibly. You can use our CPQ solution as a stand-alone variant or seamlessly integrate it into your system landscape to efficiently merge the flow of data from different systems. You can easily use and configure the standard interfaces developed with your partners.





JUNGHEINRICH

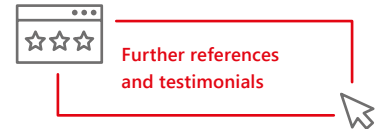
*» AIA® Collaboration is very interesting for us.
In my opinion, this is the logical consequence
of digitalization. «*

Christian Kühl,
Jungheinrich AG

CAS Merlin CPQ

deployed worldwide

From the big corporation to the family-owned business - every day, our CAS Merlin CPQ solution supports companies in efficiently selling complex products and services. In line with the Customer Centricity philosophy, the customer is at the center of all touchpoints, services, and product development decisions. Thereby, your business relationships become strong partnerships and customers become excited fans.





KONICA MINOLTA

"As an innovative corporation, we use modern technologies such as the product configurator to provide our customers with individual and powerful all-round solutions. «

Jörg Bittenbinder,
Product Manager at Konica Minolta GmbH

Your CPQ project in expert hands

The first steps towards a successful project include establishing a cooperative and equal partnership as well as open communication. We focus on your sector- and company-specific requirements and create a CPQ solution that fits your needs for your lasting company success.

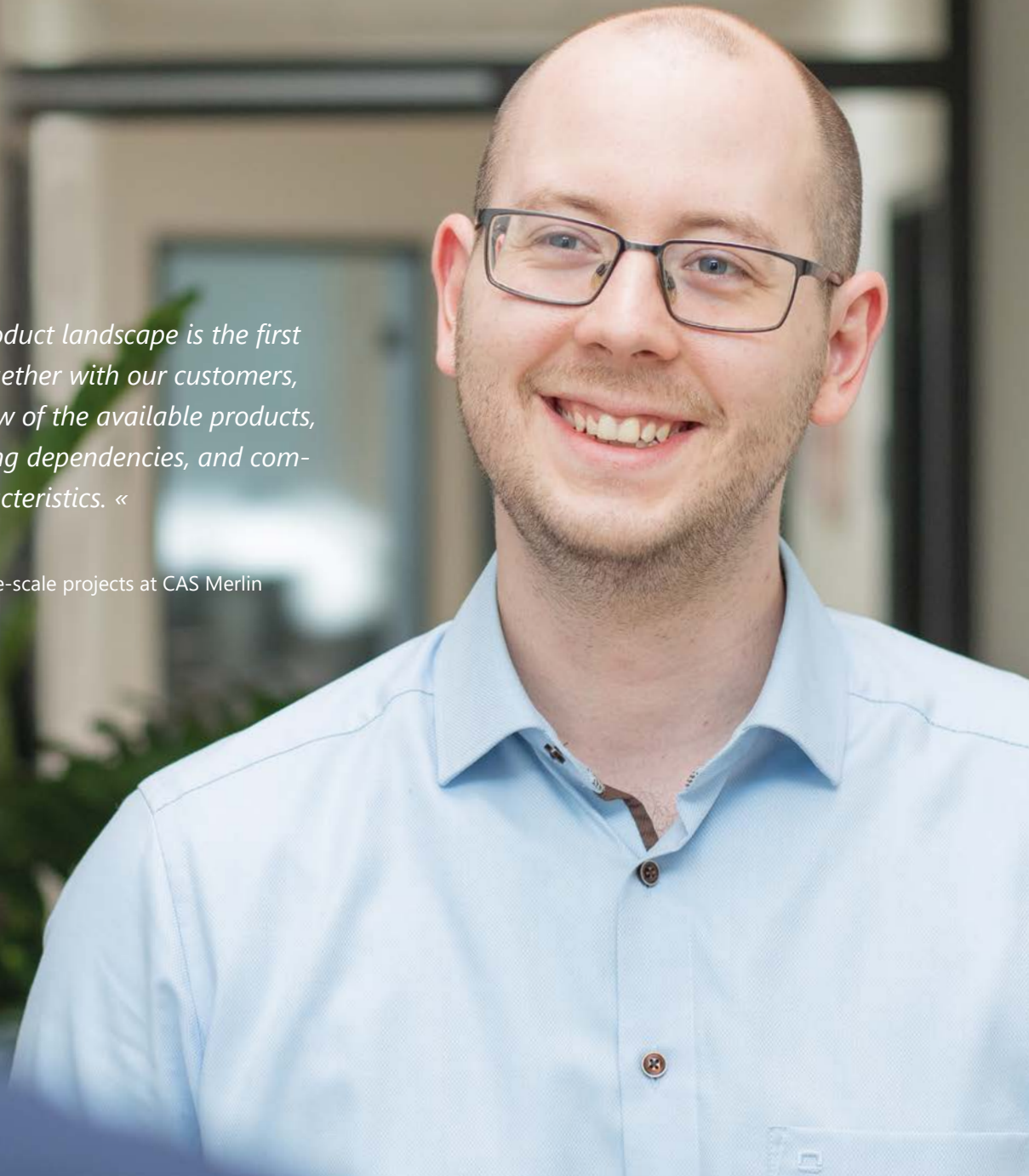
Let's start your CPQ project together with professional consulting based on our extensive experience. We will share our

extensive expertise with your employees to ensure quick and excellent results. And we will keep supporting you after your project has ended with an open ear for your requirements and challenges.



» Analyzing the product landscape is the first important step. Together with our customers, we gain an overview of the available products, components, existing dependencies, and company-specific characteristics. «

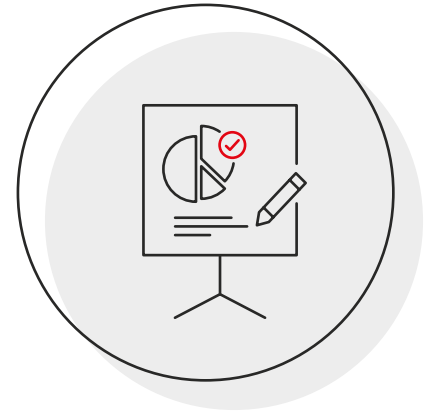
Lukas Platzek,
Project Manager for large-scale projects at CAS Merlin



Our range of services: customer-oriented service on demand

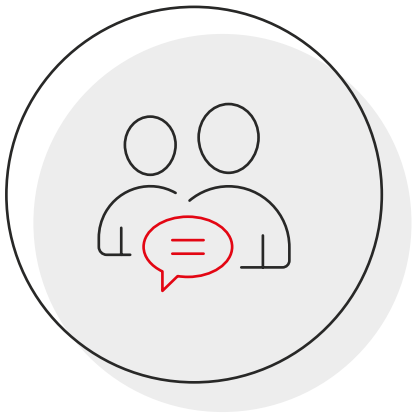
Concept

We support you in the implementation of concept projects, hold vision workshops for you, and help you to unitize your product landscape and digitalization strategy.



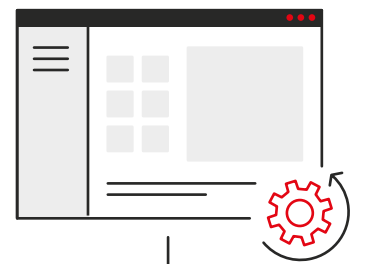
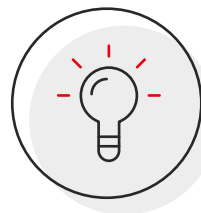
Implementation

We offer a qualified initial training, modeling support on demand, and individual training options. With our expert know-how, we come equipped with extensive knowledge to best meet your requirements.



Live operation

Even after the project has ended, we are here for you: regular reviews of your set of rules as well as software updates ensure the longterm efficiency of your CPQ solution. With our extensive training and workshop program, we offer further training for your employees if required and optimize your custom CAS Merlin CPQ in line with the latest trends. At the same time, your user independence is our top priority.



Innovative spirit for CPQ solutions in touch with the latest trends

We are always on the move and are constantly and continuously developing CAS Merlin CPQ. For this purpose, we utilize innovative technologies and deep learning to support companies worldwide in facing their challenges and search to actively shape the future.

In close collaboration with the CAS Future Labs innovation team, we explore market trends and technologies from various research fields. With passion for the future and in cooperation with various research institutes, universities, and partner companies, we are continuously developing innovations relevant to the market for a powerful CPQ solution.



Innovation fields

Artificial intelligence & machine learning

Proactive recommendations elevate your configuration experience to a new level. Using artificial intelligence and machine learning, we further develop and refine smart configuration forms and recommender systems for efficient product modeling and configuration.

Life-cycle oriented configuration management

Stay proactive and excite your customers even after the sales phase has ended. Using agile processes, we optimize your life-cycle oriented configuration management so that you can announce, for example, relevant product developments at the perfect time.

Mixed reality during product configuration

Create product solutions your customers can experience for themselves. Using augmented reality and virtual reality, you can visualize product knowledge and create an emotional customer experience during the configuration process by connecting to the virtual world.

GreenConfiguration

The information on product sustainability can be recorded in our solutions and here visualized for specific target groups using [GreenConfiguration](#). The newly included ecological perspective enables a comprehensive review of the configured solution and helps to configure the product variant with the least environmental impact.

CAS Merlin

Configuration driven by passion



470+

employees in
the CAS Group



38+

years
of success



25%

of turnover invested in
innovation



100%

equity
independent of
banks



20k

CAS Merlin CPQ users



170+

countries with
CAS Merlin CPQ in use

For more than 38 years, we have been developing successful CPQ solutions for SMEs and larger customers. We specialize in the introduction and customization of CPQ + AIA® solutions so that our software can bring your digital variant management to a new level. We combine powerful technology with emotional relationships. We are passionate about the simplification and digitalization of complex products and services to increase your sustainable success.

We are actively shaping the digital future: more than 470 co-creators of [CAS Software AG](#) develop innovative CPQ and CRM/XRM solutions for successful companies from all sectors across the world on the CAS Campus and at the CAS App Center.





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