



pricefx

May 2025

# SOUTHSIDE 15 RELEASE

[pricefx.com/southside](https://pricefx.com/southside)

V 1.1

# SOUTHSIDE 15

coming on

JUNE 22nd, 2025



# What's Coming with Southside 15

## Overview

### BUSINESS

#### PRICEFX COPILOT ENHANCEMENTS

Get instant insights, utilize recommendations to fix underperformance and update pricing with chat experience

#### COLLABORATION WORKFLOW

Collaborate with your team to create a quote or agreement. General release, including the activity log and other enhancements

#### PRICE CALCULATION BREAKDOWN

Breakdown calculated price per element in the live preview of Formula Designer and Strategy Designer

#### QUOTING, AGREEMENTS, REBATES EVOLUTION

Only new version (React) of Quoting, Agreements, and Rebates capabilities is available now. Ember version is discontinued.

### TECHNICAL / CONFIGURATION

#### IMPORT MANAGER

Add, update and export data, including their validation, with the Excel Client alternative. New support for Price List / LPG data

#### LOW / NO CODE INTEGRATIONS

Manage automated file-based data integrations (uploads / exports) in PlatformManager without advanced technical skills

#### ANNOUNCEMENTS

Utilize mass announcements across the partition users to highlight important events or other information

#### ON-DEMAND DASHBOARDS

Execute complex calculations within insight analytics on-demand outside of the main logic

# Availability and Preconditions

CAPABILITY	PRECONDITIONS (besides Southside 15 release deployment)	LEVEL OF EFFORT (deployment effort varies depending on implementation)
<b>Pricefx Copilot</b>	<ul style="list-style-type: none"> <li>▪ Analytics capability subscribed and in use</li> <li>▪ Sales Insights / Customer Insights / Actionable Insights Accelerators deployed and upgraded to the latest version</li> </ul>	Medium
<b>Collaboration Workflow</b>	<ul style="list-style-type: none"> <li>▪ Quoting and/or Agreements &amp; Promotions in use</li> </ul>	Low
<b>Import Manager</b>	<ul style="list-style-type: none"> <li>▪ No preconditions</li> </ul>	Low
<b>Announcements</b>	<ul style="list-style-type: none"> <li>▪ No preconditions</li> </ul>	Low
<b>No Code Integrations</b>	<ul style="list-style-type: none"> <li>▪ PlatformManager and IntegrationManager in use with the latest version</li> </ul>	Low
<b>Price Calculation Breakdown</b>	<ul style="list-style-type: none"> <li>▪ Agreements &amp; Promotions in use, Agreements Accelerator deployed and configured, and/or</li> <li>▪ Price Setting in use, Price Setting Accelerator deployed and configured</li> </ul>	Medium
<b>On-Demand Dashboards</b>	<ul style="list-style-type: none"> <li>▪ Configuration of the Dashboard required</li> </ul>	Medium



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Copilot

# Pricefx Copilot

## GET INSTANT BUSINESS INSIGHTS

Simply ask questions about performance and get clear, actionable answers

## IDENTIFY & FIX UNDERPERFORMANCE

Detect declining sales, analyze root causes, and receive tailored AI-powered recommendations

## ADJUST PRICES EFFORTLESSLY

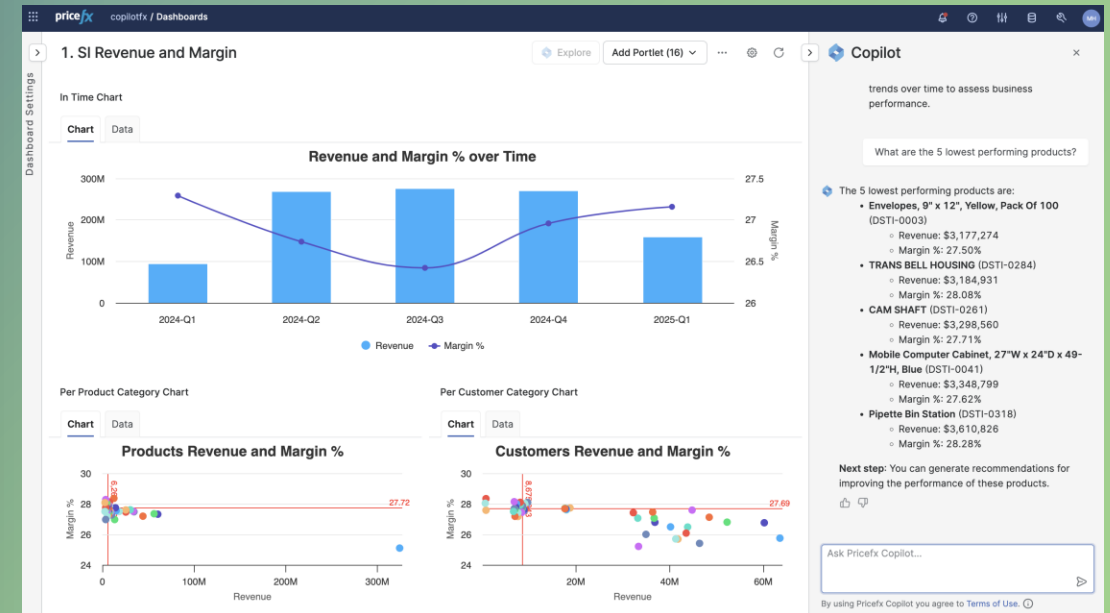
Identify price lists featuring products in your focus and streamline price updates

## EXECUTE & COLLABORATE SEAMLESSLY

Assign tasks, track progress, and ensure smooth implementation

AVAILABLE FOR SALES INSIGHTS

AND CUSTOMER INSIGHTS DASHBOARDS



# The Latest Enhancements

## Effortless Price Updates, Enhanced Actions, Access to Knowledge Base

### EFFORTLESS PRICE UPDATES

- Modify prices in Price Lists and Live Price Grids, with options for absolute or relative changes
- Set specific values or apply relative changes (e. g. *increase the price by 10%*)
- Editing and approval privileges are reflected

### ENHANCED ASSIGNED ACTIONS

- Assign more specific actions related to the price updates to your colleagues and provide them with relevant context

### IMMEDIATE ACCESS TO OUR KNOWLEDGE BASE

- Get immediate advice on how to execute a pricing task through chat interaction

The image displays a sequence of four overlapping screenshots from the Pricefx application, illustrating the workflow for price updates and actions.

- Top Screenshot:** Shows a confirmation dialog with the text: "Increase the price of DSTI-0284 by 10% in LPG 235". Below this, a message states: "Please confirm that you want to update the Manual Override field of 'TRANS BELL HOUSING' (DSTI-0284) in LPG 235 from 27.48 to 30.228." It includes "Confirm" and "Cancel" buttons.
- Second Screenshot:** Shows a chat interface with the input field "Ask Pricefx Copilot...". Below the input, it says "By using Pricefx Copilot you agree". To the right, a message confirms: "The Manual Override field of 'TRANS BELL HOUSING' (DSTI-0284) in LPG 235 has been updated from 27.48 to 30.228." It includes a link "LPG 235" and the text "I can now Submit that change for you, or help you with something else." Below this is an "ok, submit" button.
- Third Screenshot:** Shows a confirmation dialog with the text: "Please confirm that you want to submit these items to LPG 235: DSTI-0284". It includes "Confirm" and "Cancel" buttons.
- Bottom Screenshot:** Shows a confirmation dialog with the text: "Please confirm that you want to create an Action assigned to John Doe (johndoe@pricefx.com) for 2023-03-15T14:09:30.934030 with the following summary: Actionable Insights Recommendation from 1. SI Revenue and Margin". It includes "Confirm" and "Cancel" buttons.


# Get Instant Business Insights

Simply ask questions about performance and get clear, actionable answers

- **Instant Insights:** Get immediate, data-driven answers to your performance queries without the wait
- **User-Friendly Interface:** Simply ask your questions in plain language and receive clear, understandable responses
- **Comprehensive Analysis:** Access various performance metrics and trends to make informed decisions
- **Boost Efficiency:** Save time and resources by quickly identifying and addressing performance issues

## Copilot ×

What are the 3 lowest performing products?

-  The three lowest performing products based on revenue are:
- **Envelopes, 9" x 12", Yellow, Pack Of 100** (DSTI-0003)
    - Revenue: \$3,177,274
    - Margin %: 27.50%
  - **TRANS BELL HOUSING** (DSTI-0284)
    - Revenue: \$3,184,931
    - Margin %: 28.08%
  - **CAM SHAFT** (DSTI-0261)
    - Revenue: \$3,298,560
    - Margin %: 27.71%

### Possible next steps:

- You can generate recommendations for improving the performance of these products.



# Identify & Fix Underperformance

Detect declining sales, analyze root causes, get tailored recommendations

- **Early Detection:** Identify sales declines or other issues promptly to mitigate potential revenue losses
- **In-Depth Analysis:** Uncover the underlying causes of declining sales with comprehensive data analysis
- **AI-Powered Insights:** Receive specific, practical advice to enhance your performance tailored to your unique needs
- **Data-Driven Decisions:** Make informed choices with comprehensive insights and actionable data



- Based on the data, I recommend the following to improve the performance of these products:
- **DSTI-0057:** Consider revising the pricing strategy to increase the margin percentage. Analyze the competition and consider adjusting the price to a more competitive level while maintaining a healthy margin.
  - **DSTI-0095:** Review the product's cost structure to identify opportunities to reduce costs and improve the margin percentage. Consider optimizing the supply chain or negotiating better deals with suppliers.
  - **DSTI-0036:** Investigate opportunities to increase the revenue of this product. This could involve optimizing the sales strategy, improving the product's marketing and promotion, or exploring new distribution channels.

It's essential to conduct a thorough analysis and gather more data before making any decisions.



# Make Effortless Price Adjustments

Identify price lists featuring products in focus and streamline price updates

- **User-Friendly Interface:** Simplify the update process with a natural language interface, making it easy for anyone to manage price changes without advanced expertise
- **Efficient Price Updates:** Quickly identify and update price lists for key products, ensuring your pricing strategy remains competitive and up-to-date
- **Streamlined Updates:** Ensure intentional changes with our streamlined update flow, featuring confirmations and leveraging assigned privileges

The screenshot displays the Pricefx Copilot interface. At the top, a header bar reads "Copilot". Below it, a message states: "The products were found in the following LPGs".

A table titled "LPGs containing the produ..." lists the following data:

Result	LPG
DSTI-0284 in LPG 215	215
DSTI-0284 in LPG 218	218
DSTI-0284 in LPG 219	219
DSTI-0284 in LPG 235	235
DSTI-0284 in LPG 262	262

Below the table, it indicates "5 rows".

To the right of the table, a text input field contains the command: "Increase the price of DSTI-0284 by 10% in LPG 235". Below this input, a confirmation prompt appears: "Please confirm that you want to update the Manual Override field of 'TRANS BELL HOUSING' (DSTI-0284) in LPG 235 from 27.48 to 30.228." with "Confirm" and "Cancel" buttons.

Below the confirmation prompt, a text input field contains the command: "Ask Pricefx Copilot...". Below this input, a message states: "By using Pricefx Copilot y".

Below the input field, a message states: "You can update the product data in one of these LPGs.".

At the bottom right, a confirmation prompt appears: "Please confirm that you want to submit these items to LPG 235: DSTI-0284" with "Confirm" and "Cancel" buttons.

At the bottom right, a button labeled "ok, submit" is visible.

# Execute & Collaborate Seamlessly

Assign tasks, track progress, and ensure smooth implementation

- **Streamlined Task Management:** Easily assign tasks to team members, ensuring everyone knows their responsibilities and deadlines
- **Smooth Implementation:** Ensure updates run smoothly from start to finish with organized task management and continuous progress monitoring

The screenshot displays the Pricefx user interface for task management. At the top, a notification box states: "Assign action to John Doe to look at these 3 products". Below this, a confirmation dialog asks: "Please confirm that you want to create an Action assigned to John Doe (johndoe@pricefx.com) for 2023-03-15T14:09:30.934030 with the following summary: Actionable Insights Recommendation from 1. SI Revenue and Margin". The dialog includes "Confirm" and "Cancel" buttons. To the right, another notification box says: "Assign action to John Doe to look at these 3 products". Below that, a message states: "The Action has been created: [Actionable Insights Recommendation from 1. SI Revenue and Margin](#). Let me know if you want to create another action for another user or if you need help with something else."

The main interface shows the "Actionable Insights Recommendation from 1. SI Revenue and Margin" page. It includes a "Description" field with the text: "Review the performance of DSTI-0057, DSTI-0095, and DSTI-0036, and provide recommendations for improvement to increase revenue and margin. Analyze the Live Price Grids where DSTI-0057 is involved and update the product data as necessary." Below the description is a "Calculation Results" section with a table of "Quick Actions".

LPG id	Product ID	Price	Action
235	DSTI-0057	99 €	Update LPG
235	DSTI-0095	36.45 €	Update LPG
235	DSTI-0036	90 €	Update LPG

Below the table, there is a "Recommendations" section with the text: "Review the performance of DSTI-0057, DSTI-0095, and DSTI-0036, and provide recommendations for improvement. Investigate opportunities to increase revenue and margin for these products. Analyze the Live Price Grids where DSTI-0057 is involved and update the product data as necessary."



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# Collaboration Workflow

# Collaboration Workflow

## ENHANCE TEAM COLLABORATION

Streamline the quote or agreement creation process with real-time collaboration among team members

## OPTIMIZE WORKFLOWS

Ideal for scenarios with different team members handling various types of line items within a single quote or agreement

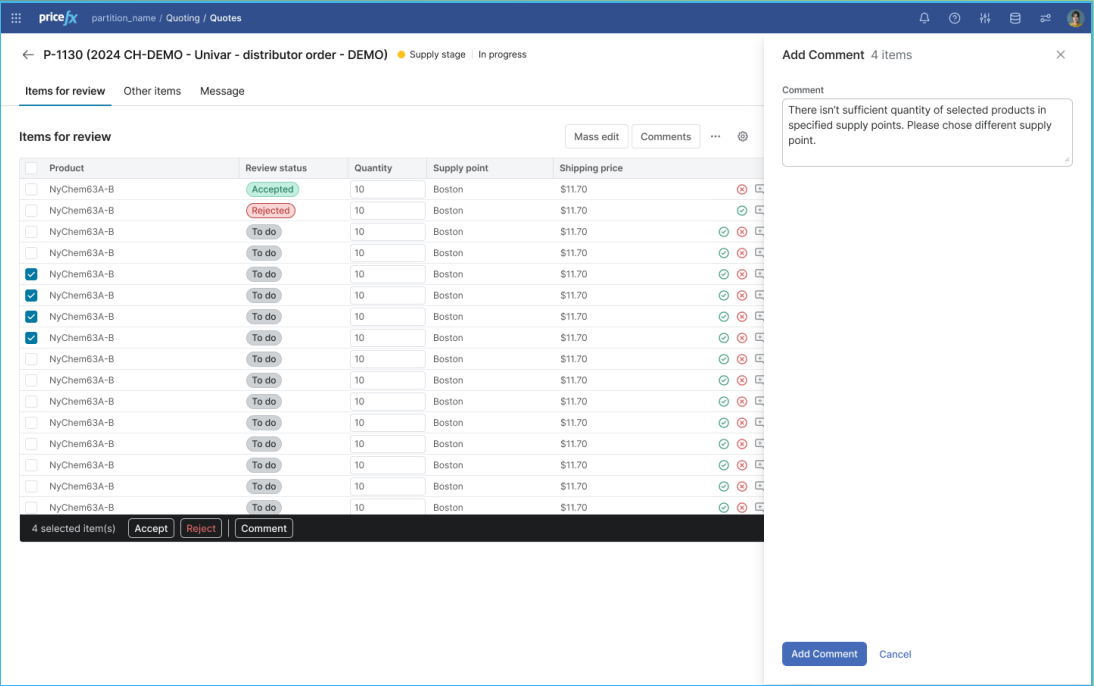
## CUSTOMIZE RESPONSIBILITY

Define specific groups of line items and assign responsible users, allowing for tailored accountability

## COLLABORATE FLEXIBLY

Facilitate parallel or sequential collaboration based on predefined orders, enhancing productivity

# GENERAL RELEASE





## Collaborate on their creation with clearly assigned responsibilities

- [illegible]



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# Import Manager

# Import Manager

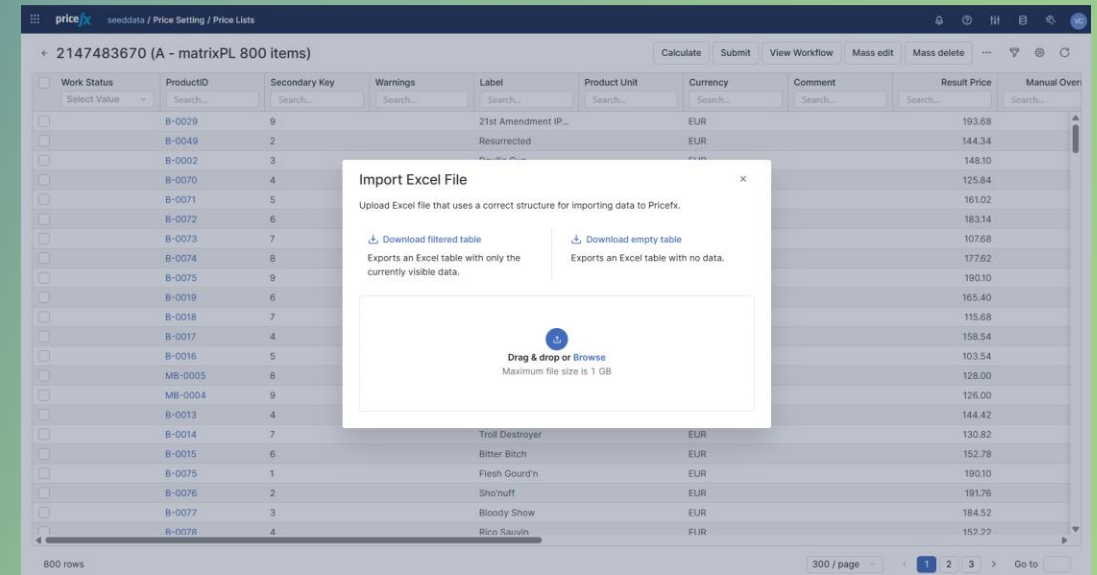
## ENHANCE DATA MANAGEMENT

Benefit from a simpler, more intuitive way to manage data in Pricefx. Export, import, or update directly within the application as an alternative to the Pricefx Excel Client

## IMPORT DATA IN MORE PLACES WITHIN THE APPLICATION

Available for Price List or Live Price Grid, Customer and Seller Master Data and Extensions, Products and Product Extensions without needing to open additional tools for a better experience

NOW AVAILABLE FOR PRICE LISTS AND LIVE PRICE GRIDS



# Comprehensive Capabilities of Import Manager

## Work with data in a new way

- **In-App Data Management:** Easily export, import, and modify data in the familiar Excel way with the in-app tool
- **Export and Edit with Ease:** Export data, edit it in Excel, and upload it back to Pricefx
- **Controlled Data Manipulation:** Review changes after import to identify mismatched rows before applying. Make bulk changes directly in the app without prior need for configuration
- **Approval Workflow Integration:** Ensure all imports are subject to approval through approval workflows

pricefx seeddata / Master Data / Imports

IM-19 (New Import)

Data for Import to Price List Items for Price List: 2147491029.

Error: 0 | Warning: 0 | New: 0 | Changed: 2 | Deleted: 1 | Unchanged: 7

Work Status	ProductID	Warnings	Label	Product Unit	Currency	Comment	Result Price	Manual Override	Previous
<input type="checkbox"/>	B-0049	▲	Resurrected		EUR		€49.88		
<input type="checkbox"/>	B-0040	▲	Bimini Twist		EUR		€2.97		
<input type="checkbox"/>	B-0043	▲	Passion Fruit Prussia		EUR		€50.71		
<input type="checkbox"/>	B-0046	▲	Reprise Centennial ...		EUR		€5.70	€6.00	
<input type="checkbox"/>	B-0045	▲	Gest-Iron-Oatmeal-B...		EUR		€23.24		
<input type="checkbox"/>	B-0048	▲	Divided Sky		EUR		€22.58	€14.00	
<input type="checkbox"/>	B-0044	▲	Send Help		EUR		€58.56		
<input type="checkbox"/>	B-0042	▲	Rod Bender Red		EUR		€9.65		
<input type="checkbox"/>	B-0047	▲	Alter Ego		EUR		€35.94		
<input type="checkbox"/>	B-0041	▲	Beach Blonde		EUR		€39.33		

10 rows



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# Low / No Code Integrations



# Low / No Code Integrations with Pricefx

## INTEGRATE DATA EFFORTLESSLY

Enable seamless data integrations of Pricefx and other IT systems without advanced technical skills

## AUTOMATE UPLOADS AND EXPORTS

Quickly set up automated file-based uploads or exports in just a few simple steps

## LEVERAGE ADVANCED INTEGRATION OPTIONS

Utilize related options, such as SFTP connection management, data mapping, monitoring, archiving etc.

## DRIVE YOUR SELF-SUFFICIENCY IN PRICEFX

Available in PlatformManager with other options enabling self-service for Pricefx platform management

The screenshot displays the 'Name' field, 'Upload Type' (Manual/Automated), 'Connection From (SFTP)' (default-sftp-connection), 'Connection To (PriceFx)' (Pricefx\_Prod), 'New Connection' button, 'Target Entity' (Customer), and 'Entity Type' (Customer). An 'Upload Overview' summary shows 118 total runs, 106 successful, 7 with errors, and 5 failed. A 'Detailed List' link is also present.

Upload Overview			
Last 24 hours			
Total Runs	Successful	With Error	Failed
118	106	7	5

# Basic Setup of the Integration

Set the source and target destination of the data

- **Streamlined Integration Setup:** Establish automated file-based data integration effortlessly with intuitive settings
- **Versatile SFTP Management:** Quickly reuse or set up new SFTP connections to pinpoint external data locations
- **Data Destination and Purpose:** Accurately define target locations within Pricefx and specify data types (customers, products etc.)

Name \*

Upload Type ?

☐ Manual

☒ Automated

Connection From (SFTP)

default-sftp-connection

↓

Connection To (PriceFx) \*

New Connection

Target Entity

Select one of the Pricefx entities (e.g. Customer, Product, Price Parameters) into which the data should be uploaded.

Entity Type \*

Next

Cancel

# Source File Settings and Data Mapping

Set input / output file parameters and data mapping to Pricefx

- **Fast Data Structure Setup:** Quickly upload sample data file and describe its format using simple settings
- **Automated Mapping Recommendations:** Leverage automated recommendation for mapping source data to Pricefx data structures
- **Data Mapping Customization:** Easily adjust data mappings, add missing elements, or ignore unnecessary attributes

## Data File Template

Please upload a sample data file corresponding to the structure you are going to be using to upload data into the selected entity (Price list).

The structure loaded from this file will be used in the next step to map fields from the file to Pricefx fields.

Uploaded Sample File \*

customer\_list.csv

[Upload Different File](#)

## Parsing options

Separator \*

, (Comma)

Escape Character

\

Date Format

yyyy-MM-dd

## Data Mapping

We automatically mapped the data we were able to match by similar names. Please check the mapping and fill in or remove unmapped fields.

[Reset Changes](#) [Detail View](#)

<input type="checkbox"/> Upload File Columns	Conversion	PriceFx Product Fields*
<input type="checkbox"/> ID	String + Add	Customer ID String
<input type="checkbox"/> Company Name	String + Add	<input type="text"/>
<input type="checkbox"/> Segment	String + Add	Segmentation String
<input type="checkbox"/> Currency	String + Add	Currency String
<input type="checkbox"/> Industry	String + Add	Industry String
<input type="checkbox"/> Country	String + Add	Country String
<input type="checkbox"/> City	String + Add	<input type="text"/>
<input type="checkbox"/> Region	String + Add	Region String
<input type="checkbox"/> VAT ID	String + Add	<input type="text"/>

# Frequency Settings and Monitoring

Set the frequency of uploads / exports and monitor the operation

- **Customize Upload / Export Frequency:** Set the frequency of data uploads or exports to match your precise needs
- **Data Archiving:** Request archiving of processed data whenever necessary
- **Real-Time Process Monitoring:** Gain visibility into automated upload and export runs at any time, ensuring transparency and control over data operations
- **Integration Insights:** Monitor successfully processed data and identify any errors

## Upload Schedule

### Run Upload \*

- ☒ Immediately when the file appears in the source location
- ☐ At regular intervals

### File Archiving

☐ Archive processed files ?

### > Advanced Options

Create Back Cancel

### Upload Overview

Last 24 hours ▾

[Detailed List](#)

Total Runs	Successful	With Error	Failed
118	106	7	5

All Last 24 hours (7) Last 7 days (16) Last 30 days (21)

Upload Time	Upload Name	File Name	Status	No. Of Records	Failed Records
Search...	Search...	Search...	Search...	Search...	Search...
> 19/02/2025 13:00:00	Regular-LPG-import	product-import.csv	Processed with errors	110	3
> 19/02/2025 12:00:00	Regular-LPG-import	product-import.csv	Processed with errors	110	3
> 19/02/2025 11:00:00	Regular-LPG-import	product-import.csv	Processed with errors	110	3



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# Announcements



# Announcements

## CENTRALIZE COMMUNICATION

Communicate easily important application-related information directly within the Pricefx application, eliminating the need for multiple channels

## IMPROVE USER AWARENESS

Keep the users always informed with mass notifications and reduce the risk of missed information and unexpected situations

## REDUCE SUPPORT CASES

Decrease the number of support cases by informing users about system unavailability and other updates

**New Feature Available: The new Pricefx Copilot is now ready for use!**

**System Notification: Please be aware that there will be a brief system downtime on Friday,**

Name	Label	Warnings	Claim Type	Customer Name
CL-11	myExcelClaim		Claim Type	Distributor 1
CL-12	myQuoteBasedClaim		Claim Type	Distributor 1
CL-13	mySubmittedClaim		Claim Type	Distributor 2
CL-14	myApprovedClaim		Claim Type	Distributor 2

Name	Label	Start Date	End Date	Workflow Status
C-2	Contract to Copy & ...	1/2/2018	1/2/2018	
C-3	Unity Contract	1/2/2018	1/2/2018	Draft
C-4	New Contract	3/12/2018	3/12/2018	Approved
C-16	Approved Contract ...	4/4/2018	1/1/2019	Approved
C-17	New Contract	4/5/2018	4/5/2018	Approved

Name	Label	Type	Step Label
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# Inform Users Directly within the Application

## Set-up mass notifications regarding the Pricefx application

- **Manage it with ease:** Admins setup up notifications based on predefines parameters, ensuring relevant information reaches the right users at the right time
- **Broad-Spectrum Notifications:** Notify users about scheduled maintenance, product upgrades, important milestones or unexpected situations
- **Different Types of Messages:** Leverage time-bound messages that are displayed only during a define period or select one-time messages. Set-up whether the user can close a notification

The screenshot shows the 'Notifications' configuration page in the Pricefx application. At the top, there's a 'Notifications' header with an 'Active' status indicator and two buttons: 'Update notification' and 'Turn off banner'. Below this is the 'Notifications Banner' section, which includes a description: 'Create a notification banner that will be displayed to all users.' A preview of the banner is shown, featuring the Pricefx logo and the text: 'New Release Announcement: We are excited to announce the release of Pricefx v15, Southside, on June 22, 2025.' Below the preview, there are input fields for 'Title' (containing 'New Release Announcement:'), 'Description' (containing 'We are excited to announce the release of Pricefx v15, Southside, on June 22, 2025.'), and 'Period' (set to '3/27/2025' to '3/28/2025'). At the bottom, there is a toggle switch for 'Users can dismiss a banner', which is currently turned on.



# Price Calculation Breakdown

# Price Calculation Breakdown

## WORK WITH PRICE STRATEGIES AND FORMULAS WITHOUT ANY CODING

Utilize an intuitive drag and drop way within the Formula Designer and Strategy Designer. Reduce reliance on the configuration team

## SHOWCASE COMPONENT VALUES IN DETAIL

See the value of components in a formula or price strategy, enhancing visibility and trust in the accuracy of price calculations for better decision-making

## DEBUG STRATEGIES AND FORMULAS

Understand the impact of logic execution and the values of each block, designed for power users

FOR STRATEGY DESIGNER  
AND FORMULA DESIGNER

The screenshot displays the 'Simple Strategy' interface in the Pricefx Strategy Designer. The main workspace shows a logic flow with the following steps:

- Add variables:** A block to initialize variables.
- set CompetitionPrice to Competition (ver1):** A block to set the competition price.
- set CostPlusMarkup to Markup (ver1) \* 20:** A block to calculate the cost-plus markup.
- Percentage true:** A block to set a percentage value.
- if CompetitionPrice <= 0.95 >= CostPlusMarkup:** A conditional logic block.
- Then CompetitionPrice:** A block to set the price to the competition price if the condition is true.
- Else CostPlusMarkup:** A block to set the price to the cost-plus markup if the condition is false.

The right-hand side of the interface shows the 'Live Preview' section, which includes a 'Preview' tab and a 'Code' tab. The 'Preview' tab displays the following information:

- ProductID:** AK\_0001
- Select a dependency level:** Root
- Target Date:** Today
- Calculate:** A button to trigger the calculation.

Below the 'Live Preview' section, the 'Calculation Result' table shows the following data:

	Value	Time
Price	32	284

The 'Variables' section shows the following values:

Name	Value
CompetitionPrice	32
CostPlusMarkup	30

The 'Data Lookups' section shows the following values:

Name	Value
Competition (ver1)	32

The 'Snippets' section shows the following values:

Name	Value
Markup	30

# View Calculation in Real Time

Breakdown calculated price per pricing element

- **Analyze Price Components:** Perform detailed analytics on individual components of the formula or strategy
- **Access Live Preview:** Each building block is displayed in real-time when a formula or strategy is previewed, showing its value and the execution path of the logic

## Calculation Result

		Value	Time		
▼	Price	32	284	👁	
	Step	Value	Time		
	sd0ceefaa24a464f52858bb87728a8f1391736863458733	32	236	👁	↑
	variable["CompetitionPrice"]( <a href="#">32</a> )	32	256	👁	↑
	number	0.95	0	👁	↑
	math_arithmetic/multiply( <a href="#">32</a> , <a href="#">0.95</a> )	30.4	256	👁	↑
	number	20	0	👁	↑
	boolean	true	0	👁	↑
>	snippet["Markup (ver1)"]( <a href="#">Markup = 20</a> , <a href="#">Percentage = true</a> )	30	15	👁	↑
	variable["CostPlusMarkup"]( <a href="#">30</a> )	30	15	👁	↑
	logic_compare/gt( <a href="#">30.4</a> , <a href="#">30</a> )	true	272	👁	↑
	logic_ternary( <a href="#">condition = true</a> , <a href="#">then = 32</a> )	32	284	👁	↑





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# On-Demand Dashboards

# On-Demand Dashboards

## IMPROVE DASHBOARDS PERFORMANCE

Enhance the overall performance of complex logic calculations by moving non-essential calculations out of the main logic. Reduce significantly process time for complex logic calculation using the modal dashboard for inline analytics

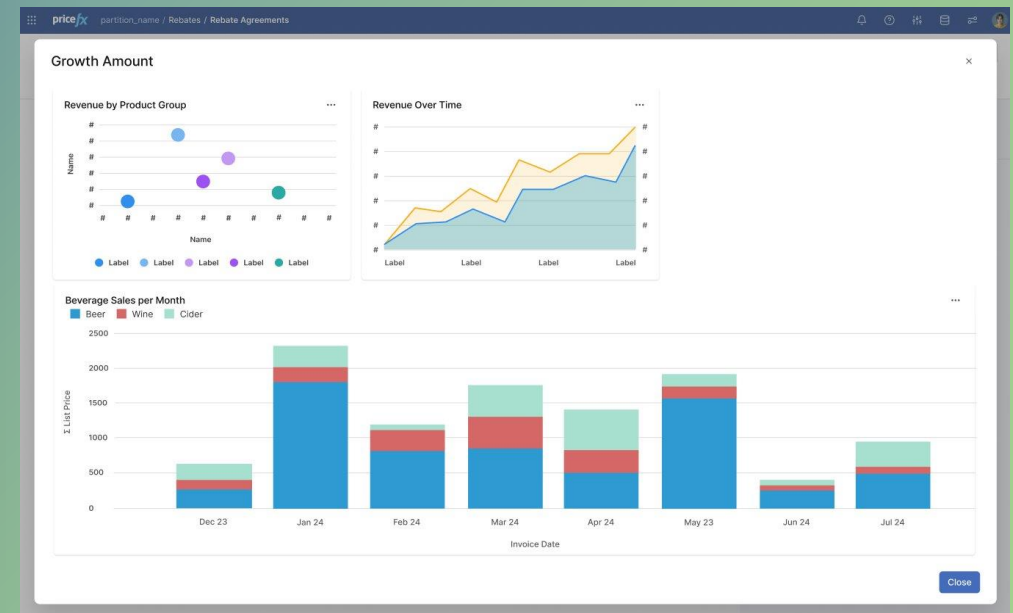
## ENHANCE USABILITY

Access and execute inline dashboard logic calculations in a modal window only when needed. Improve workflow efficiency

## SUPPORT FLEXIBILITY

Create analytics within your existing processes, reconfigure the logic, and at the same time keep existing configurations working without any changes

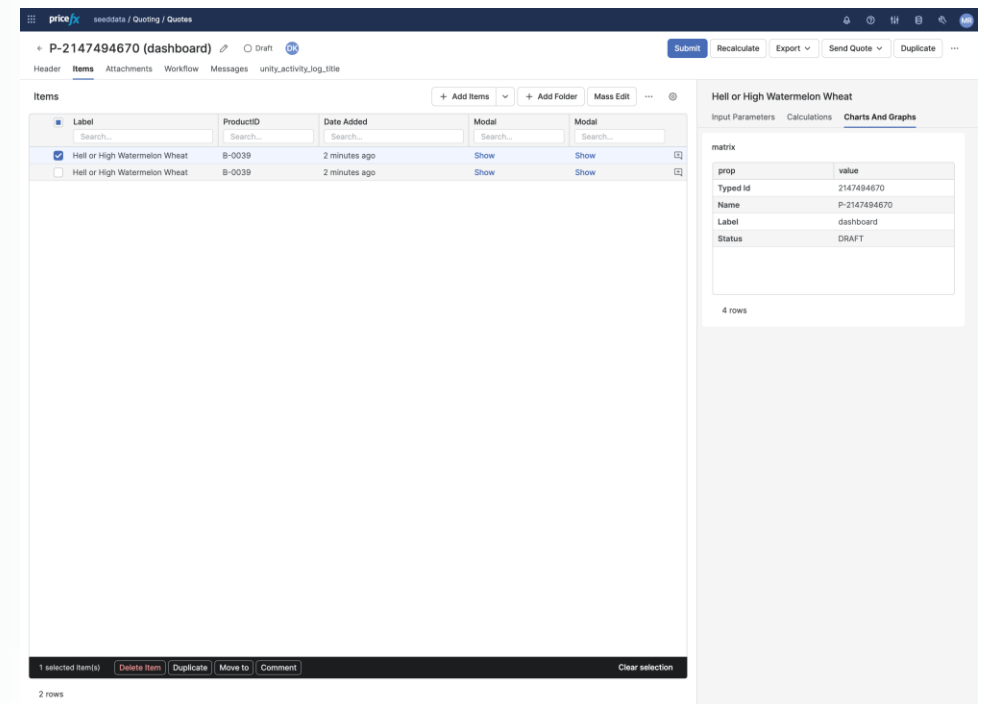
AVAILABLE IN QUOTES, CONTRACTS  
WITHIN AGREEMENTS & PROMOTIONS,  
REBATES AND PRICE SETTING



# Execute Complex Calculations On-Demand

Streamline workflow and get insights faster

- **On-Demand Execution:** Execute inline dashboard logic calculations only when needed, reducing unnecessary recalculations
- **Real-Time Insights:** Access data-driven insights instantly without waiting for the entire logic to run
- **Enhanced Workflow:** The ability to open and execute inline dashboard logic calculations in a modal window streamlines the workflow
- **Dashboard Options:** Choose to view dashboards in a full-screen pop-up window or a side panel, providing flexibility in how insights are accessed and visualized



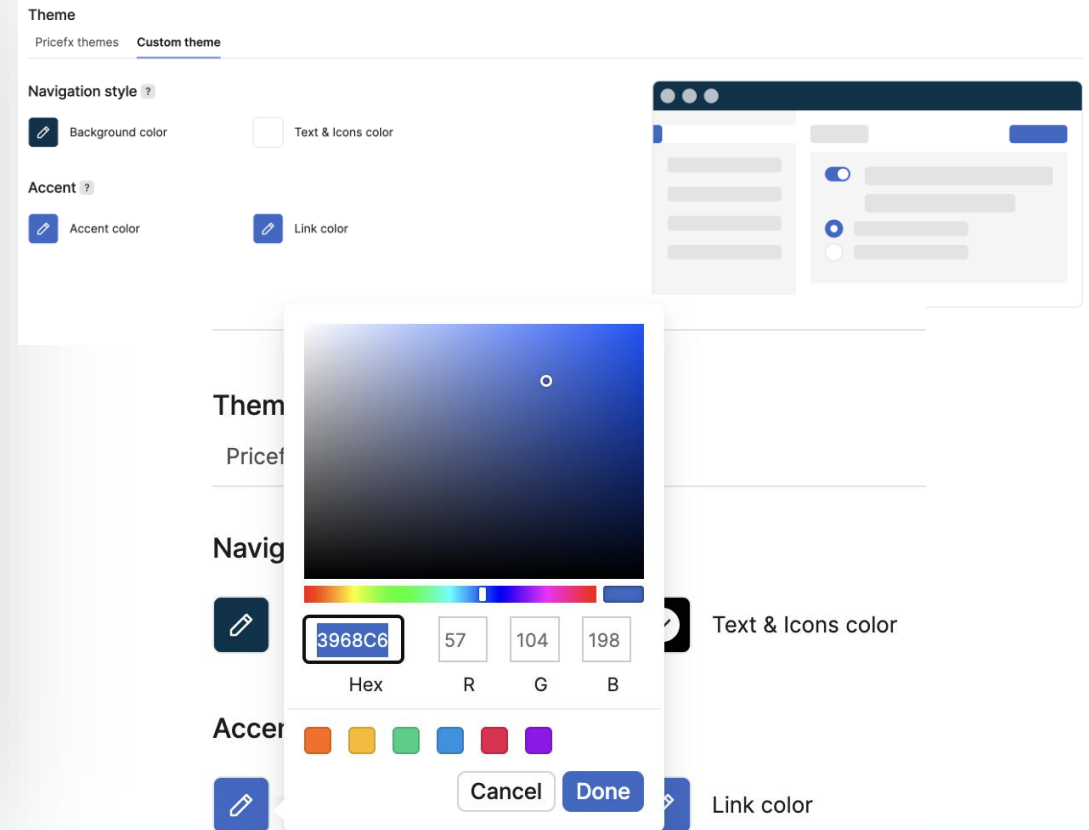


# Other Release Highlights

# Appearance with Custom Colors

## Customize the look of Pricefx application

- **Personalize Your Pricefx Experience:** Tailor the appearance of your Pricefx application to reflect your brand's identity or other rules
- **Flexible Customization Options:** Select unique colors for the top navigation bar, text, icons, and essential UI elements like links, toggles, and buttons
- **Predefined or Custom Colors:** Choose from a palette of predefined colors or set your own custom color to match your needs

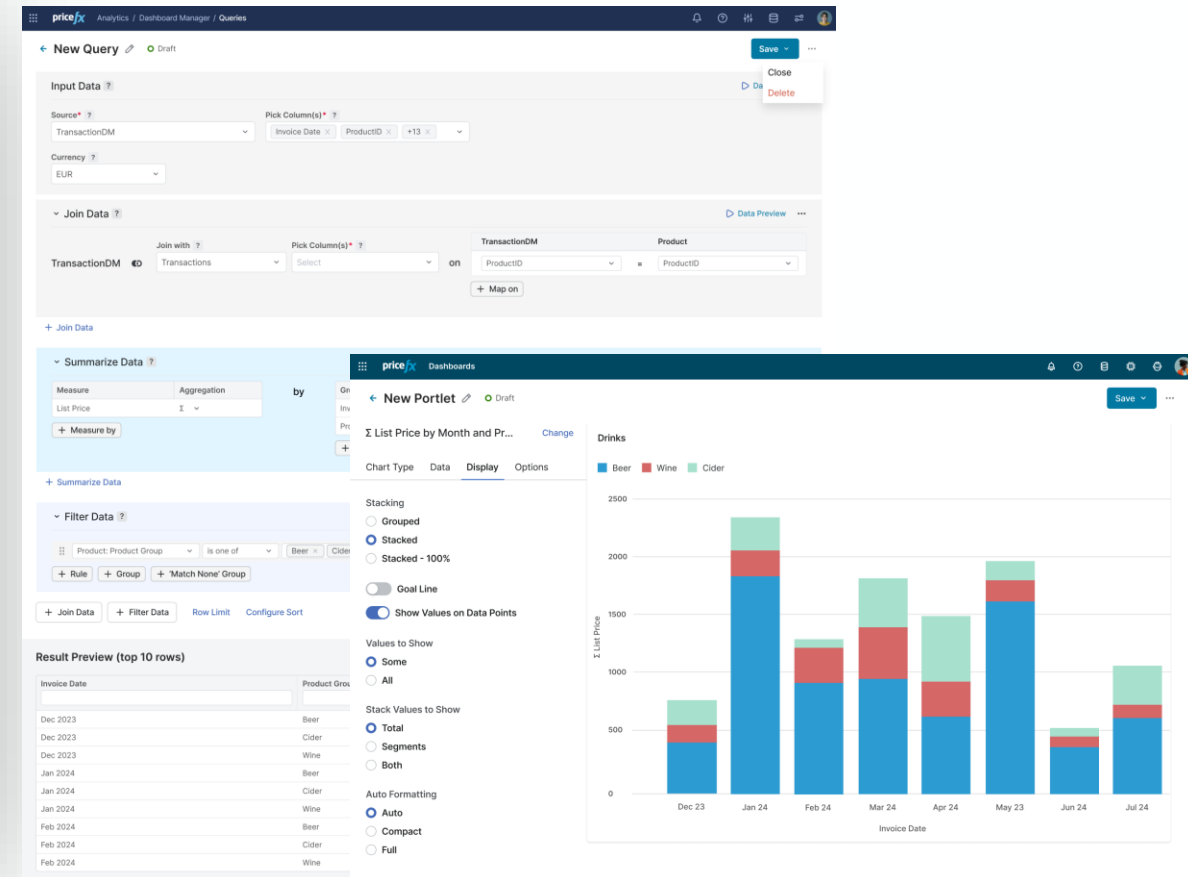




# Self-service Dashboards - Preview

Create your own dashboards without technical skills and coding

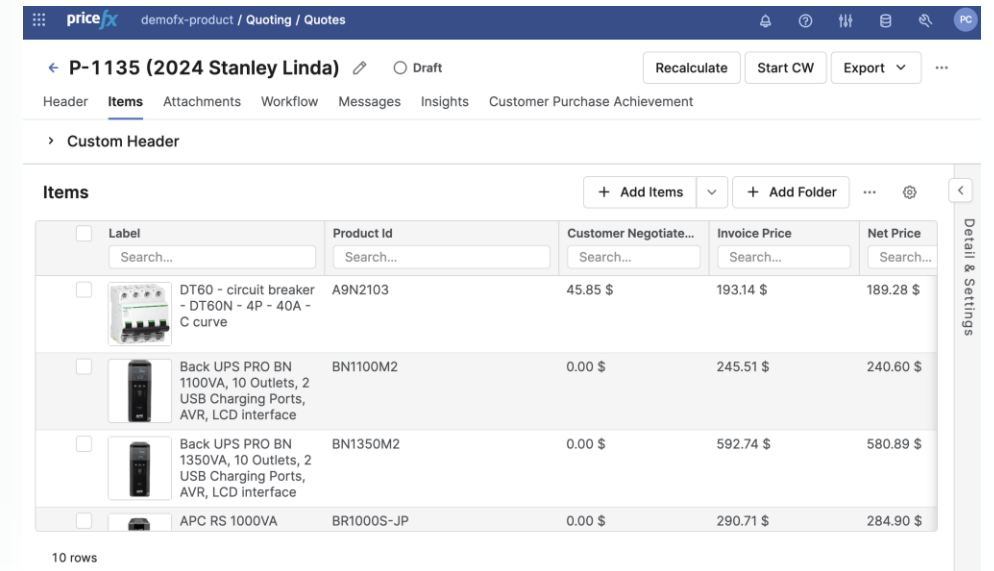
- **Tailored to Your Data Needs:** Create dashboards that perfectly align with your specific data needs
- **No Technical Skills Required:** Achieve self-sufficiency without the need for coding or technical expertise.
- **Effortless Data Queries:** Easily create data queries and visualize results through a variety of chart types
- **Well organized:** Utilize new folders for the better navigation across various dashboards
- **Preview:** In release 15 available for preview, can be enabled through Feature Flags



# Quoting, Agreements, and Rebates Evolution

Only new (React) version available in release 15

- Only new version (React) only of Quoting, Agreements & Promotions, and Rebates capabilities is available now
- Ember version of these capabilities is **discontinued** in release 15
- New version of these capabilities brings many **advantages and enhancements**, such as direct access to insights, support for large documents, auto-save and more
- Learn on all advantages [here](#)







pricefx demo-product / Quoting / Quotes

← P-1135 (2024 Stanley Linda) Draft Recalculate Start CW Export ...

Header Items Attachments Workflow Messages Insights Customer Purchase Achievement

> Custom Header

Items + Add Items + Add Folder ...

<input type="checkbox"/>	Label Search...	Product Id Search...	Customer Negotiate... Search...	Invoice Price Search...	Net Price Search...
<input type="checkbox"/>	 DT60 - circuit breaker - DT60N - 4P - 40A - C curve	A9N2103	45.85 \$	193.14 \$	189.28 \$
<input type="checkbox"/>	 Back UPS PRO BN 1100VA, 10 Outlets, 2 USB Charging Ports, AVR, LCD interface	BN1100M2	0.00 \$	245.51 \$	240.60 \$
<input type="checkbox"/>	 Back UPS PRO BN 1350VA, 10 Outlets, 2 USB Charging Ports, AVR, LCD interface	BN1350M2	0.00 \$	592.74 \$	580.89 \$
<input type="checkbox"/>	 APC RS 1000VA	BR1000S-JP	0.00 \$	290.71 \$	284.90 \$

10 rows

Detail & Settings

# Pricefx N-1 Release Policy

- **Pricefx provides official support for the latest 2 releases.** Currently, **Rampur 13.x** and **Caribou Lou 14.x** releases meet this condition
- Once the **Southside 15** release is made available, all our customers will be required to use either **Southside 15.x** (*N release*) or **Caribou Lou 14.x** (*N-1 release*)
- **If you are on the Rampur 13** release, we encourage you to start planning for the **upgrade to Caribou Lou 14** already now

Information important primarily for Customers hosted in Private cloud environments.  
Customers hosted in Shared environment are upgraded automatically and comply with the policy.

