



pricefx

November 2024

# CARIBOU LOU 14 RELEASE

V 1.0

[www.pricefx.com/cariboulou](http://www.pricefx.com/cariboulou)

CARIBOU LOU 14  
coming on  
JANUARY 26th, 2025



# What's Coming with Caribou Lou 14

## Overview

### BUSINESS

#### PRICEFX COPILOT (AI ASSISTANT)

Leverage conversational chat-like experience to obtain intelligent pricing insights, actionable recommendations, and prioritized actions

#### AI OPTIMIZATION – FORECASTING

Get revenue and volume/quantity forecast for your assumed pricing steps and assess various options for the final decision

#### REBATES by ENABLE

Utilize productized integration with Rebates solution by Enable to easily model any rebate deal and take control of its business impact

#### COLLABORATION WORKFLOW

Collaborate with your team on a quote or agreement creation. Available as a pre-release

### TECHNICAL / CONFIGURATION

#### PRICE SETTING TYPES

Set generic defaults for how Price Lists or Live Price Grids are created (logics, field mapping, view preferences, ...)

#### VISUAL CONFIGURATION ENHANCEMENTS

Design reusable components / block structures in price strategies in Strategy Designer

#### IMPORT MANAGER

Add, update and export data in Pricefx, including validation, as the Excel Client alternative. New way to manage data

#### PLATFORM MANAGEMENT

Manage Pricefx Platform with the latest improvements related to the Event Workflows and Data Management

# Availability and Preconditions

Capability	Preconditions (besides Caribou Lou 14 release deployment)	Level of Effort (deployment effort varies depending on implementation)
Pricefx Copilot	<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> <li>To leverage the price setting recommendations, Price Setting capability must be subscribed and in use (optional)</li> </ul>	Medium
Revenue Forecast	<ul style="list-style-type: none"> <li>Forecast Accelerator deployed</li> <li>Data mappings and other settings</li> </ul>	Medium
Rebates by Enable	<ul style="list-style-type: none"> <li>Enable solution subscribed</li> <li>Data mappings and other settings</li> </ul>	High
Price Setting Types	<ul style="list-style-type: none"> <li>No preconditions</li> </ul>	Low
Import Manager	<ul style="list-style-type: none"> <li>No preconditions</li> </ul>	Low
Visual Configuration (Reusable Snippets)	<ul style="list-style-type: none"> <li>Price Strategy Designer requires deployment and use of Price Setting Accelerator</li> </ul>	High



A person with dark hair, wearing a headset, is seated at a desk and looking down at a laptop. The entire image is covered with a semi-transparent blue overlay. The 'pricefx' logo is positioned on the left side, and the text 'PRICEFX COPILOT' is on the right side.

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PRICEFX COPILOT

# LEVERAGE CHAT-LIKE EXPERIENCE TO INTERACT WITH PRICEFX SOFTWARE

**Pricefx Copilot allows conversational experience** to interact with Pricefx software

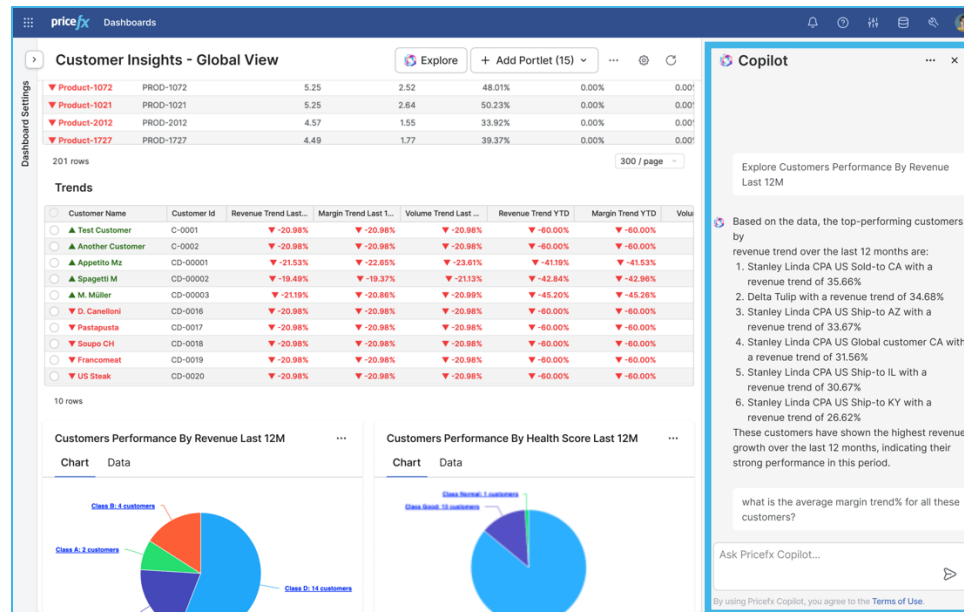
At its first release, it's available within **Sales and Customer Insights Dashboards**

Enables **business conversation** related to the data

**Suggests recommendations** how to act in the **price setting area** and **converts insights into actions**

**Guides a user through the application** to complete a business process

# Conversational Experience to Gain Insights from Dashboards



**Copilot**

Explore Customers Performance By Revenue Last 12M

Based on the data, the top-performing customers by revenue trend over the last 12 months are:

1. Stanley Linda CPA US Sold-to CA with a revenue trend of 35.66%
2. Delta Tulip with a revenue trend of 34.68%
3. Stanley Linda CPA US Ship-to AZ with a revenue trend of 33.67%
4. Stanley Linda CPA US Global customer CA with a revenue trend of 31.56%
5. Stanley Linda CPA US Ship-to IL with a revenue trend of 30.67%
6. Stanley Linda CPA US Ship-to KY with a revenue trend of 26.62%

These customers have shown the highest revenue growth over the last 12 months, indicating their strong performance in this period.

what is the average margin trend% for all these customers?

Ask Pricefx Copilot...

By using Pricefx Copilot, you agree to the [Terms of Use](#).

**Copilot**

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what is the average margin trend% for all these customers?

The average margin trend percentage for all the customers is approximately 20.045%. This indicates that, on average, these customers have experienced a 20.045% change in their margin trend over the last 12 months.

What is the lowest performing customer?

Processing...

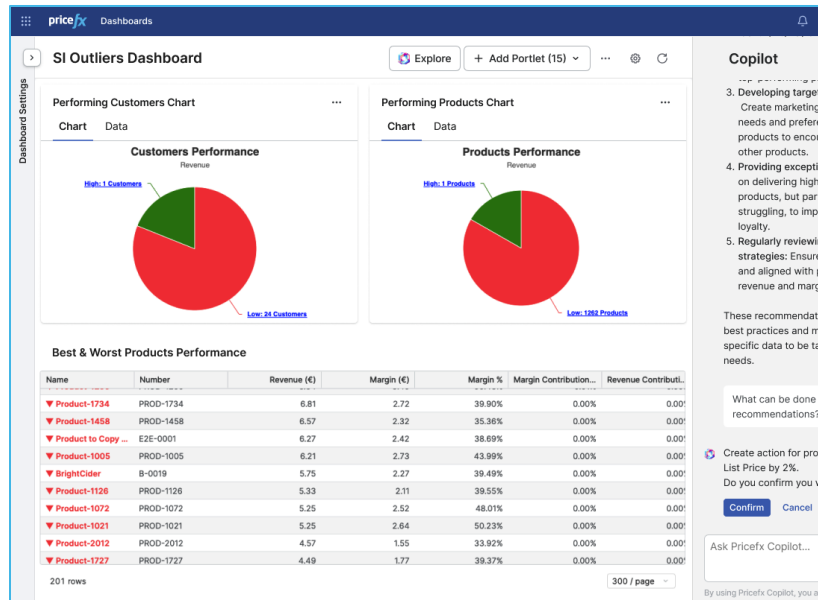
Ask Pricefx Copilot...

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## Pricefx Copilot enables business conversation related to the data in Sales Insights and Customer Insights Dashboards

- Uncovering trends in the respective area
- Drilling down for details
- Filtering specific items based on described criteria (e. g. low margin products), etc.

# Insights Turning into Suggested Recommendations and Actions



## Copilot

3. Developing targeted marketing strategies: Create marketing campaigns that cater to the needs and preferences of top-performing products to encourage similar behavior from other products.
4. Providing exceptional product support: Focus on delivering high-quality support to all products, but particularly to those that are struggling, to improve overall satisfaction and loyalty.
5. Regularly reviewing and adjusting pricing strategies: Ensure that pricing is competitive and aligned with product value to maximize revenue and margin.

These recommendations are based on general best practices and may require further analysis of specific data to be tailored to your business needs.

What can be done based on these recommendations?

- Create action for product BrightCider to increase List Price by 2%. Do you confirm you want to proceed?

Confirm Cancel

Ask Pricefx Copilot...

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Pricefx Copilot **suggests recommendations in the price setting area** and converts insights into actions, e. g. revise Price List, update Live Price Grid etc. (the range of actions will be extended in the next releases)

The Product Price Increase Recommendation interface shows a risk indicator of 67/100, a recommendation type of 2.1% List Price, and 4 suggested actions. The suggested actions table lists products and their recommended price increases.

LPG Name	ProductID	Quantity	Margin	Action
▼ LPG Global				
✓ BrightCider	B-0019	39000	5.3%	✓
✓ DarkCider	42	23200	3%	✓
▼ LPG Europe				

2 selected item(s) Update Item(s) Clear Selection

**Recommendation**

- Reason for Adjustment: Low-performance insight identified in the Outliers dashboard for specific list of **regularly sold products**.
- Adjustment Amount: Increase the price **by 2%** for the identified low-performing SKUs.
- Target Products: Products flagged as low-performing based on margin and sales velocity in the Outliers dashboard (see attached [Outliers Dashboard](#)).



# Typical User Journey for Pricefx Copilot

A pricing analyst opens a Customer Insights / Sales Insights Dashboard to **gain insights into any underperformance in the product portfolio and identify potential for revenue improvements**

The pricing analyst starts **investigating the root cause of why the identified products are underperforming to create recommendations** for the pricing teams to improve

**A recommendation is created with suggested quick actions** to be handled by the pricing or sales teams in the price setting area

The **suggested action is taken by the pricing or sales teams to adjust the list price in the Live Price Grid** to utilize the potential identified in the analytical Dashboard

Pricing or sales teams **submit changes for all the updated Live Price Grid items** to uncover new prices to be shared with customers

# Pricefx Copilot for Free for 3 Months

- Try Pricefx Copilot **for free for 3 months**
- **Promotion validity:** January – June 2025
- Regular fee for the Pricefx Copilot will be charged after the promo expiry
- Pre-conditions for Copilot use are met

**Activate Pricefx Copilot risk free for three months and experience the value for yourself.**

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AI optimization  
pricefx

REVENUE FORECASTING

# FORECAST YOUR REVENUE USING REAL DATA FOR MORE ACCURATE DECISIONS

Use AI to **forecast revenue or quantity** for the coming months based on your transaction data

Provide forecasts not only **per product**, but use also at **customer level**, thanks to a detailed breakdown to achieve more accurate decisions

Based on forecast, simulate, plan strategy, better analyze trends and **take more accurate decisions**

Available as the Forecast Accelerator



# Unlocking Potential Use Cases

**Rebates** – Estimate the allocation of customer rebates more accurately to get a clear overview of how much you will have to pay by the end of the year

**Price Setting** – Use the revenue forecast instead of past transactions to assess the impact of price changes

**Agreements** – Compare expected revenue for your contracts to last year's results

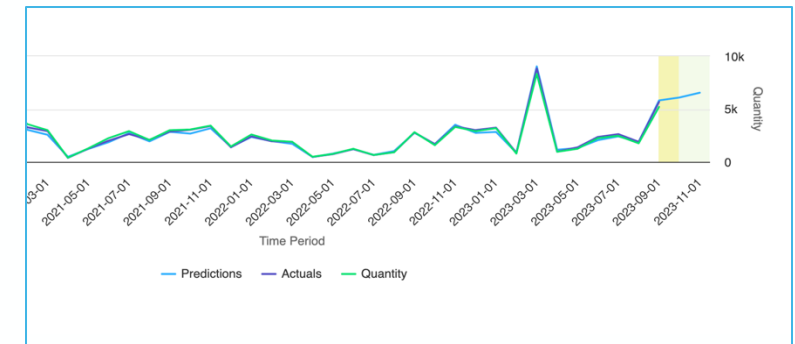
**Quotes** – Estimate expected revenue for a specific customer or a product in quoting

**Actionable Insights** – Monitor discrepancies, such as anticipated changes in customer spending patterns, to proactively address them and take actions throughout the year

← 1091 (Global Pricelist 2024)

▼ Header

Product Id	Product Name	Forecasted Revenue	Forecasted Volume	Forecasted Margin %
Search...	Search...	Search...	Search...	Search...
A9N17581	IDPN - circuit breaker - IDPN N - 3P + N - 13A - B curve	6,305,904.33	34,246	45.46%
BR1000S-JP	APC RS 1000VA Sinewave Battery Backup 100V	6,685,457.80	38,859	59.78%
C2	APC AV C Type 2 Outlet Wall Mount Power Filter, 120V	3,096,230.97	43,509	54.41%
C20B	APC AV C Type 8 Outlet Power Filter, 120V	4,437,470.03	45,077	52.73%
CCTFR6901	Build Your Own Mini Cord Sets	9,035,022.10	34,952	58.40%
MEG5050-0001	Merten - Wisser Home Touch with stand white	8,072,182.85	44,294	57.14%
MEG5220-6035	Rocker for 2-gang push-button module, lotus white, System Design	359,938.39	45,139	41.69%
MEG5220-6036	Rocker for 2-gang push-button module, stainless steel, System Design	475,592.29	46,031	54.51%



# Set the Parameters for Forecasting

Metric Type \*

Revenue

Revenue

Quantity

Revenue \*

GlobalListPrice

LocalAdjustment

LocalListPrice

StandardDiscount

CustomerDiscount

SpotDiscount

Surcharges

InvoicePrice

Select the metric you want to forecast based on and the **depending** on the metric

☒ Add a Customer Dimension

Customer \*

CustomerID

CustomerID

CITY

Country

State

Classification

Account group

Region

Customer type

Customer Categorical Features

Country × Account group × Region ×

Industry × CG Name ×

Define the right customer(s) for which you want to make a forecast

# Configure Forecast Based on Your Needs

**Additional Sources**    Aggregation level

---

**Events Source**

Source  
BankHolidays [DS]

Filter  
[+ Set Filter](#)

Date \*  
Date

Event Names \*

**Events Source**

Date	Holiday Name	LastUpdateDate
12/31/2025	New Year's Eve	9/5/2023 7:10 PM
12/30/2025	After Christmas	9/5/2023 7:10 PM
12/29/2025	After Christmas	9/5/2023 7:10 PM
12/28/2025	After Christmas	9/5/2023 7:10 PM
12/27/2025	After Christmas	9/5/2023 7:10 PM
12/26/2025	After Christmas	9/5/2023 7:10 PM
12/25/2025	Christmas Day	9/5/2023 7:10 PM

Add **additional sources** and assess if needed, such as bank holidays, promotional planning, or future price changes that can affect the forecast

**Aggregation for Forecasting**

Product Aggregation Level \*  
ProductID ×

Customer Aggregation Level \*  
CustomerID × Country × Region ×

**Final Forecasts**

Forecast Export Key Columns \*  
ProductID × CustomerID ×

Forecast at an **aggregated level** and **then drill down** to view detailed insights, allowing precise definition of forecast granularity

# Leverage Your Data for Better Accuracy

Select the product and customer **attributes** that will be **valuable to understanding** underlying trends

**Product categorical features**

PF Name × PG Name × PG ×  
Product Type × Range × Subrange ×  
Format × Product Group ×  
Sub Product Group × Product Line ×  
Competitiveness × Material × Grade ×

**Product numerical features**

Size ×

☒ Add a Customer Dimension

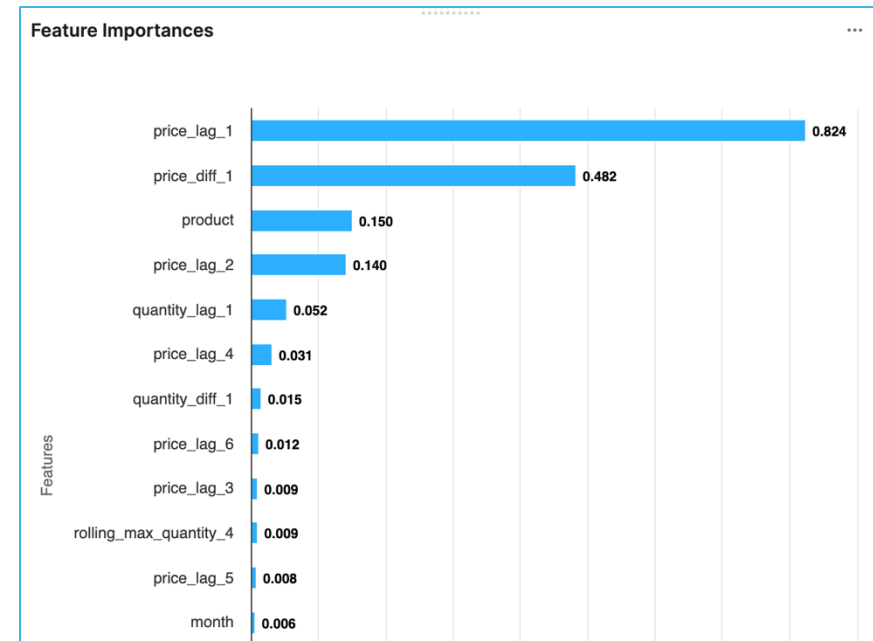
**Customer\***

CustomerID

**Customer Categorical Features**

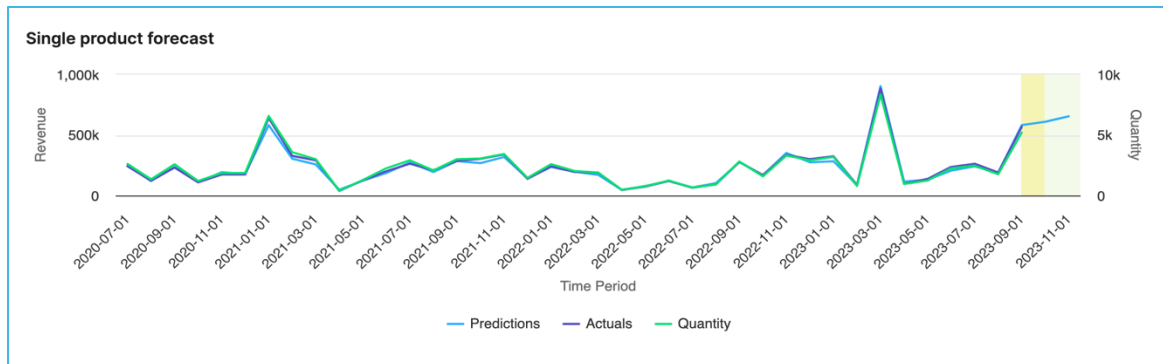
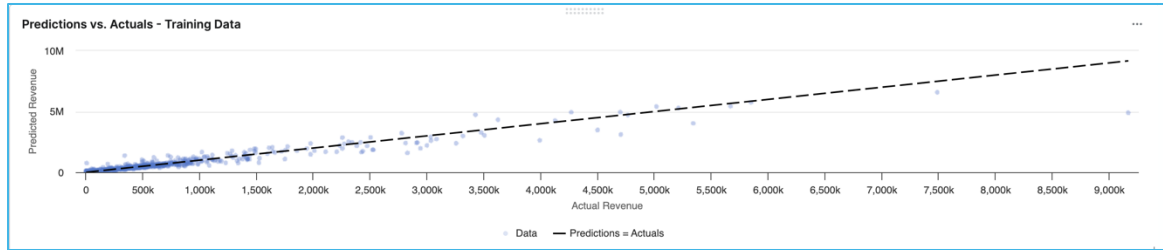
Country × Account group × Region ×  
Industry × CG Name ×

Review the most important **factors impacting** outputs





# Leverage Results for Accurate Decisions



**Final Forecasts**

Forecast Export Key Columns \*

ProductID × CustomerID × Accountgroup × CGName × Country × Industry × Region ×

**Data Source Export**

☒ Create a New DataSource?

Name of Exported DataSource \*

ForecastRevenueMonthlyMJE

**Benchmark the results** against last period and adjust parameters based on metrics to match your business objectives

**Explore the forecast** with the latest data per product, customer and period (daily, weekly, monthly or yearly)

**Export** in a data source with the same structure as transactions for easier use in other process

A person with dark hair, wearing a headset, is shown from the side, looking down at a computer. The image has a strong blue color overlay. The text 'pricefx' is overlaid on the left side, and 'REBATES by ENABLE' is overlaid on the right side.

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REBATES by ENABLE

# UTILIZE PRODUCTIZED INTEGRATION WITH ENABLE REBATES SOLUTION

**Complex rebate programs for customers and suppliers,** managed through **Enable Rebate Management** solution

**Rebate calculations available in Pricefx** at the time of quotation or price list creation

**Seamless contextual navigation** between Pricefx and Enable applications

**One login** for both applications

**Pricefx as single source of truth** – customer integrates with Pricefx only

# Seamless End-to-End Management of Your Rebates Profitability

## Simple Workflows

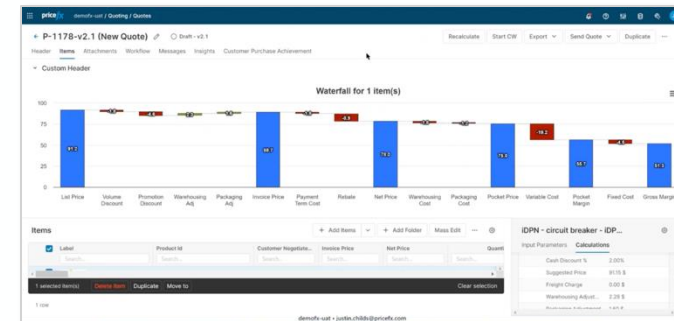
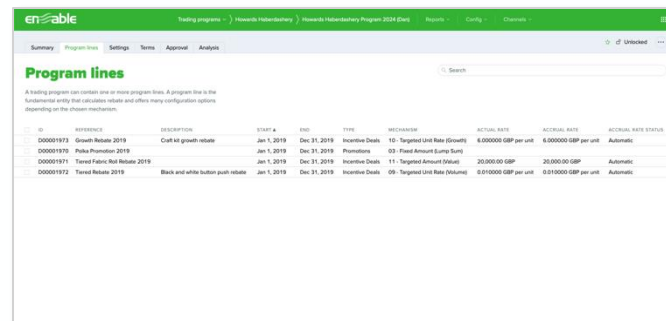
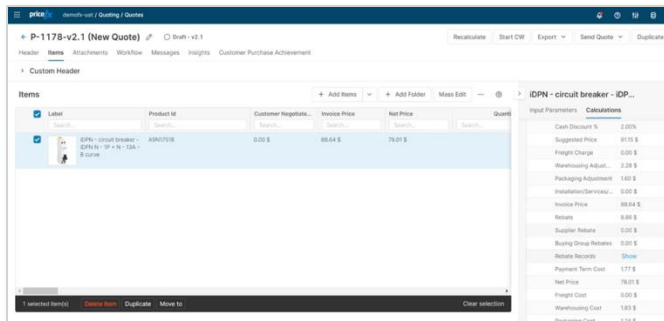
- ✓ One place to create, manage and execute your deals
- ✓ Rebate earnings included at quote and price list creation
- ✓ Seamlessly create quotes directly from your rebate programs

## Automatic Syncing

- ✓ Systematic updates of rebate programs, earnings, and forecasts between Enable and Pricefx
- ✓ Integration with your tech stack - ERP, BI tools, and more!

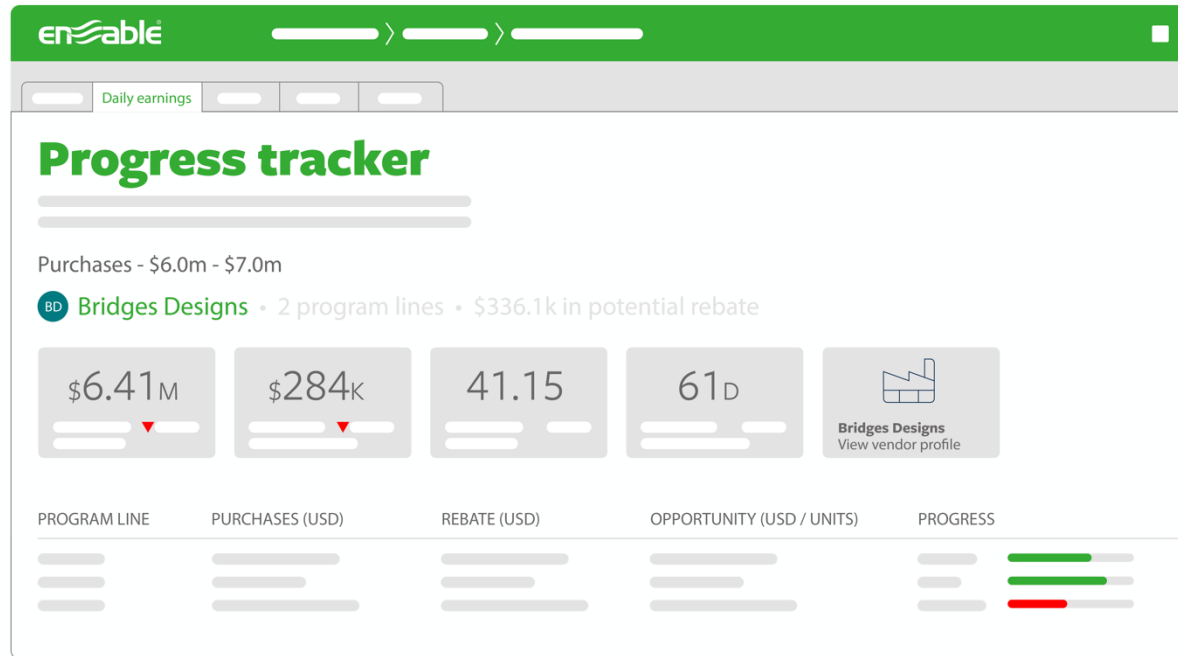
## Strategic Insights

- ✓ Waterfall-based guidance for rebate program creation
- ✓ Rebate earnings included in price analysis
- ✓ Advanced margin and profitability analysis





# Manage All Your Rebate Deals Seamlessly

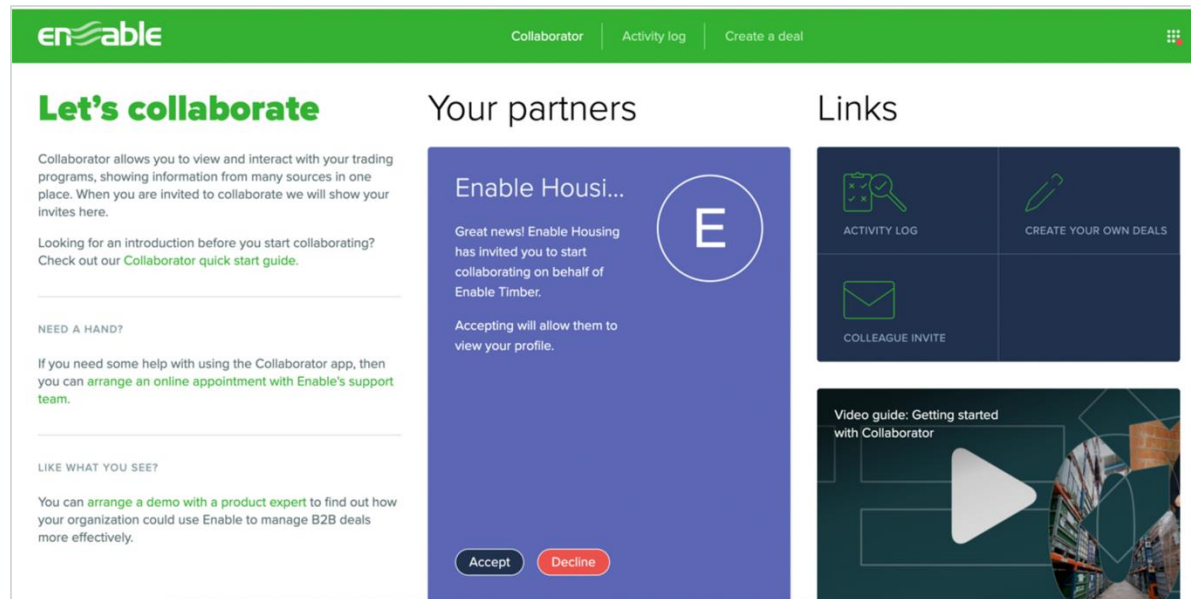


**Automated rebate calculation and collection** - calculate and settle/collect rebates with confidence while reducing errors and increasing efficiency

**Creation and calculation of all rebate types** - leverage incentives, retrospective discounts, volume rebates, co-op funds, promotions, market development funds, lump sums, loyalty schemes, commissions and royalties

**Dynamic forecasting** - review and accept forecast recommendations which consider seasonality and allow you to track, adjust and model projected rebates

# Collaborate Seamlessly with Every Partner

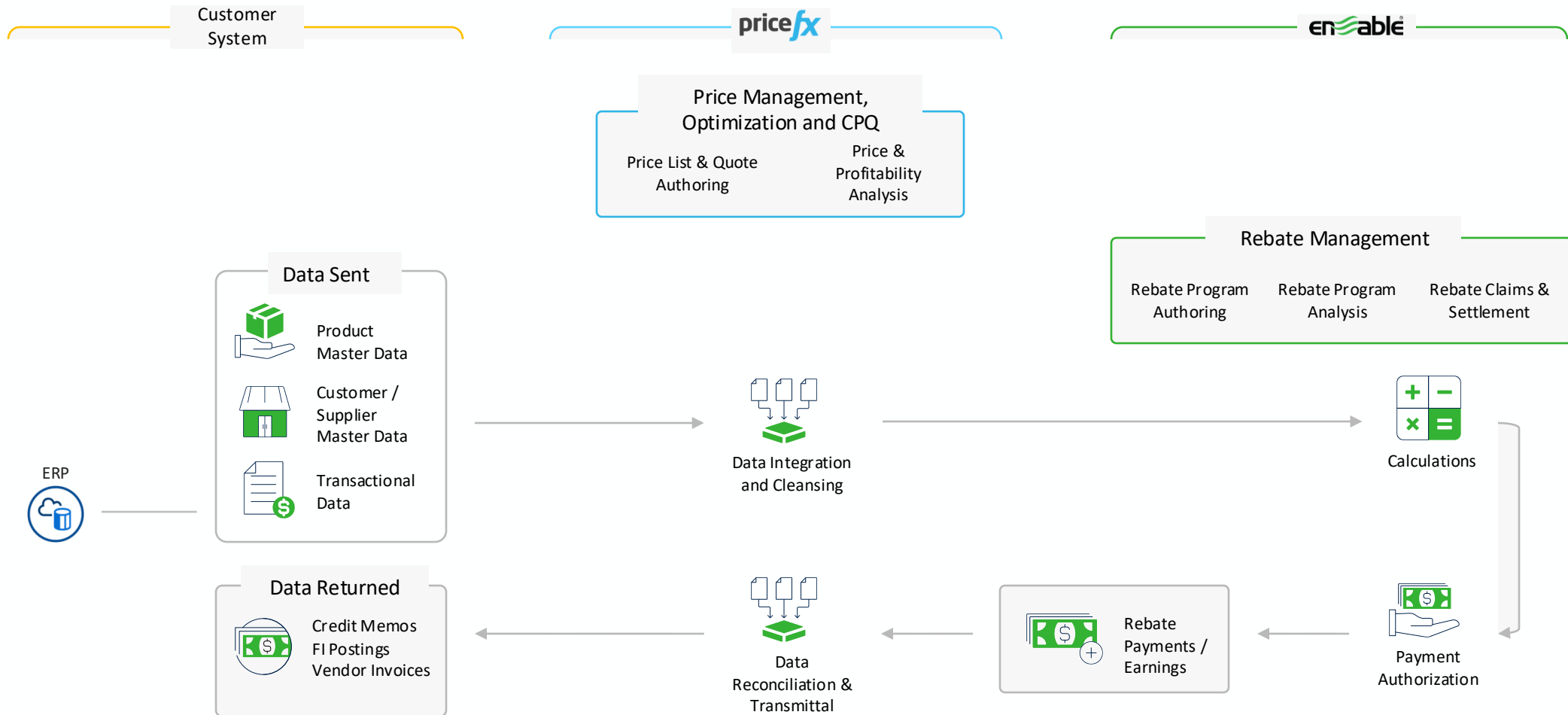


**Deal Sign-Off** - invite trading partners to view, comment on, and approve deal proposals from a single, secure location

**Partner Dashboard** - minimize reporting requests and align on common goals by providing a real-time view of ongoing deal progress

**Activity Log** - review all activity that has been undertaken in the portal including invitation statuses, deal views, and proposal sign-offs

# Integration Overview



# Rebate Calculations in Pricefx Quoting

The screenshot displays the Pricefx Quoting interface for quote P-49 (2024-Aug). The interface is divided into several sections:

- Quote Summary:** Shows a quote value of \$334.49, which is 22% below the target. It also indicates an approval required of 4 hours and a suggested increase of \$33.45.
- Inputs:** Includes fields for Effective Date (19/08/2024) and Expiry Date (19/08/2024).
- Input Parameters:** Includes a Customer dropdown and a Ship To field.
- Calculations & Details:** A sidebar showing various calculations such as Product Revenue (\$396,689.79), Net Margin (\$-0), and Net Margin % (-0.00%). It also lists various programs like Quote Impact Simulation, Program Line Sales Chart, and Earnings.
- Items:** A table listing items with columns for Label, Quantity, Customer List Price, Local Adjustments, and Off Invoice Rebates. The table shows 5 rows of items, including ENGINE LONG BLOCK DSTI-0255, TIMING GEAR DSTI-0253, and Edge Protectors.

**Rebate Calculations** – available directly within Pricefx at the time of a quote creation process with **real-time calculation** based on the respective rebate program rules and the latest data

**Contextual navigation** – options to navigate to Enable application for more details on underlying rebate data or rebate program details, etc.

Similar options available also at **Price List** creation / modification



# Contextual Navigation between Pricefx and Enable Rebates

The image displays two overlapping software interfaces. On the left is the Pricefx application, showing a sidebar menu with 'Rebates' expanded to reveal options like 'Dashboard', 'Trading Programs', 'Program Earnings', and 'Finance - Creditors Report'. On the right is the Enable application, showing a 'Quoting / Quotes' table with columns for 'Label', 'Workflow Status', and 'Created'. Below this, the 'Payment Terms for Rebate' form is visible, with fields for 'Supplier', 'Payment Days', 'Payment Method', and 'Credit Note'. The 'Payment Days' field is set to '30 days from end of rebate period'.

Label	Workflow Status	Created
New Quote	Draft	18/01/2024 16:23
New Quote	Draft	27/05/2024 15:59
Copy of New Quote	Draft	28/05/2024 8:28
Demo	Draft	13/06/2024 17:48
New Quote	Draft	08/07/2024 14:53
New Quote	Draft	11/07/2024 16:28

**Supplier**

Name: Bell Taps & Showers  
Company Number: 12345  
Address:

**Payment Terms for Rebate**

Payment Days: 30 days from end of rebate period  
Payment Method: Credit Note

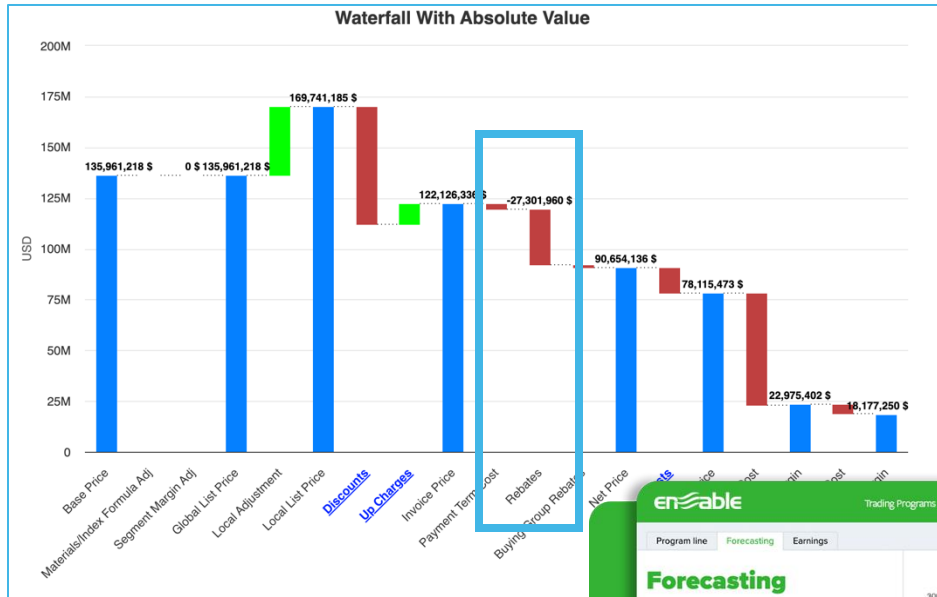
**Documents**

Document 1:  Upload  
Document 2:  Upload  
Document 3:

**Integrated navigation** – contextual links available in both Pricefx and Enable to cross-navigate between them and the specific context

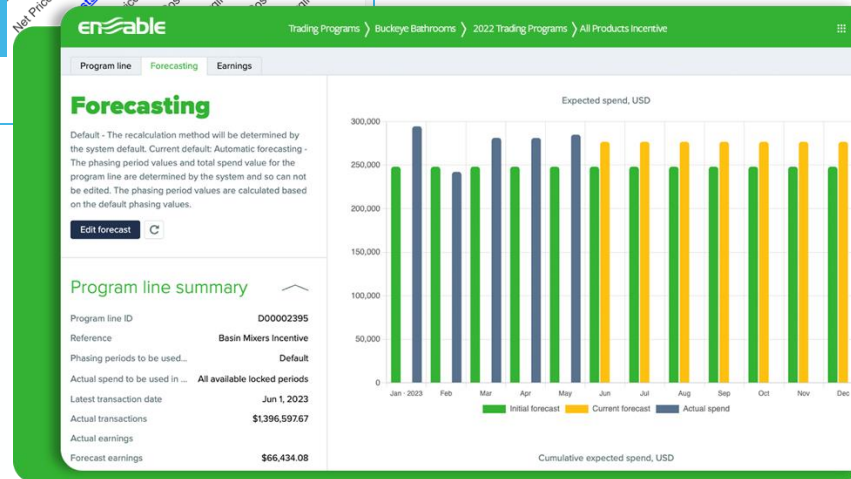
**Rebate program creation** and other advanced tasks available in Enable application, accessible directly from Pricefx menu

# Analytics and Forecasting



**Rebates performance** included within the Pricefx Analytics with the same options and views as for other pricing data

**Detailed views and rebates forecasting** available in Enable application



**enable** Trading Programs > Reports

**Program earnings** | **Daily earnings** | **Transactions** | **Forecast earnings** | **My reports** | **Program earnings**

**Transactions**

VENDOR	VENDOR REFERENCE	TRANSACTION DATE	TOTAL TRANSACTION UNITS	SALES	EFFECTIVE RATE (ACTUAL)	EARNINGS (ACTUAL)	CURRENCY	STATUS
Abel Faucets	5026	Oct 3, 2022	494		3.71 %	1,101.62	USD	✓
Abel Faucets	5026	Oct 4, 2022	506		3.75 %	1,029.25	USD	✓
Abel Faucets	5026	Oct 5, 2022	451	29,765.40	3.72 %	1,108.29	USD	✓
Abel Faucets	5026	Oct 6, 2022	469	27,024.35	3.75 %	1,012.98	USD	✓
Abel Faucets	5026	Oct 7, 2022	454	27,653.05	3.69 %	1,019.44	USD	✓
Abel Faucets	5026	Oct 10, 2022	437	25,526.42	3.72 %	948.81	USD	✓
Abel Faucets	5026	Oct 11, 2022	530	32,042.56	3.68 %	1,178.57	USD	✓
Abel Faucets	5026	Oct 12, 2022	492	27,821.44	3.66 %	1,018.17	USD	✓
Abel Faucets	5026	Oct 13, 2022	507	28,796.78	3.69 %	1,062.45	USD	✓
Abel Faucets	5026	Oct 14, 2022	515	29,905.46	3.69 %	1,102.86	USD	✓
Abel Faucets	5026	Oct 17, 2022	434	26,189.50	3.68 %	963.98	USD	✓
Abel Faucets	5026	Oct 18, 2022	556	30,749.47	3.72 %	1,144.66	USD	✓
Abel Faucets	5026	Oct 19, 2022	473	26,078.67	3.70 %	965.28	USD	✓
Abel Faucets	5026	Oct 20, 2022	518	30,130.79	3.78 %	1,138.74	USD	✓
Abel Faucets	5026	Oct 21, 2022	436	27,604.74	3.70 %	1,020.38	USD	✓
Abel Faucets	5026	Oct 24, 2022	487	30,047.04	3.71 %	1,115.73	USD	✓
Abel Faucets	5026	Oct 25, 2022	420	26,378.84	3.70 %	975.18	USD	✓
Abel Faucets	5026	Oct 26, 2022	558	32,126.26	3.69 %	1,185.66	USD	✓
Abel Faucets	5026	Oct 27, 2022	466	30,543.45	3.70 %	1,131.20	USD	✓
Abel Faucets	5026	Oct 28, 2022	477	28,709.21	3.73 %	1,070.39	USD	✓
Abel Faucets	5026	Oct 31, 2022	405	24,089.83	3.70 %	891.32	USD	✓
<b>Totals</b>			<b>10,085</b>	<b>598,350.71</b>		<b>22,184.95</b>		

[Download](#) [Refresh](#) [Change criteria](#) [Showing all results](#)

A person with dark hair, wearing a headset, is seated at a desk and looking down at a laptop. The image is overlaid with a semi-transparent blue filter. The 'pricefx' logo is positioned on the left side, and the title 'PRICE SETTING TYPES' is on the right.

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# PRICE SETTING TYPES

# REUSE PREDEFINED PRICE SETTING TEMPLATES TO CREATE PRICE LIST OR LIVE PRICE GRIDS

**Price Setting Types** are definable **templates with generic defaults** for how Price Lists or Live Price Grids are created

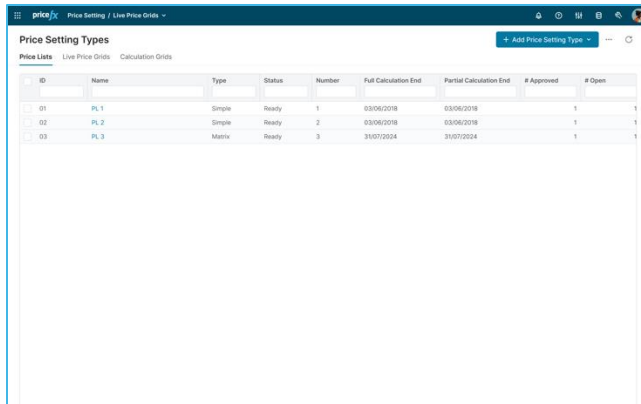
**Simplify creation process** for Price Lists and Live Price Grids **and minimize errors** with the pre-setting of the defaults

**Predefined defaults** include pricing logic, calculation logic inputs, settings of dynamic behavior of Live Price Grids, output columns, etc.

Options to **set which defaults can be overridden** at specific Price List or Live Price Grids

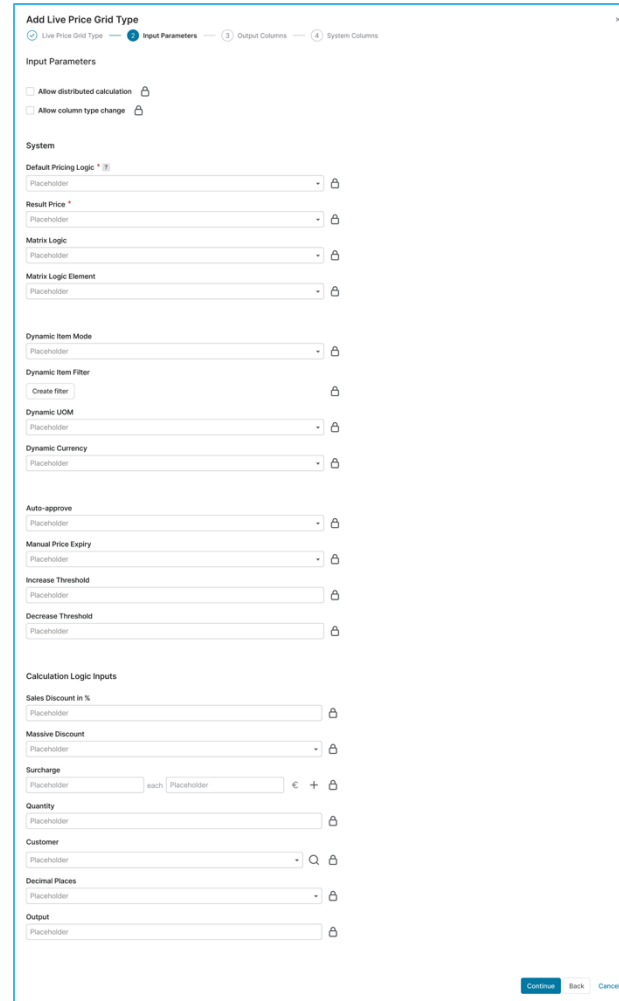
In the future releases, it will be made available also for the **Calculation Grids**

# Define the Price Setting Type



The screenshot shows the 'Price Setting Types' interface with a table listing existing types. The table has columns for ID, Name, Type, Status, Number, Full Calculation End, Partial Calculation End, # Approved, and # Open.

ID	Name	Type	Status	Number	Full Calculation End	Partial Calculation End	# Approved	# Open
01	PL 1	Simple	Ready	1	03/06/2019	03/06/2019	1	1
02	PL 2	Simple	Ready	2	03/06/2019	03/06/2019	1	1
03	PL 3	Matrix	Ready	3	31/07/2024	31/07/2024	1	1



The screenshot shows the 'Add Live Price Grid Type' configuration form. It includes sections for Input Parameters, System, Dynamic Item Mode, Dynamic Item Filter, Dynamic UOM, Dynamic Currency, Auto-approve, Manual Price Expiry, Increase Threshold, Decrease Threshold, Calculation Logic Inputs, Sales Discount in %, Massive Discount, Surcharge, Quantity, Customer, Decimal Places, and Output. Each field is a placeholder or dropdown menu.

**Add Live Price Grid Type**

Live Price Grid Type — Input Parameters — Output Columns — System Columns

**Input Parameters**

- ☐ Allow distributed calculation
- ☐ Allow column type change

**System**

Default Pricing Logic \* Placeholder

Result Price \* Placeholder

Matrix Logic Placeholder

Matrix Logic Element Placeholder

**Dynamic Item Mode** Placeholder

**Dynamic Item Filter** Placeholder

Create filter Placeholder

**Dynamic UOM** Placeholder

**Dynamic Currency** Placeholder

**Auto-approve** Placeholder

**Manual Price Expiry** Placeholder

**Increase Threshold** Placeholder

**Decrease Threshold** Placeholder

**Calculation Logic Inputs**

Sales Discount in % Placeholder

Massive Discount Placeholder

Surcharge Placeholder each Placeholder € +

Quantity Placeholder

Customer Placeholder

Decimal Places Placeholder

Output Placeholder

Continue Back Cancel

**Predefine generic defaults** to be applied to a specific Price List or Live Price Grids

Set which **default values can be overridden** during the creation of a specific Price List or Live Price Grid

**Predefined values consist of** pricing logic, calculation logic inputs, settings of dynamic behavior of Live Price Grids, output columns, etc.

# Apply the Price Setting Type

**New Live Price Grid** Customer Net LPG

Define — Products — **Parameters** — Custom Columns — System Columns

### Parameters

**Dynamic Item Mode**  
Add & Remove

**Auto-approve**  
Current Price

▼ From Template

ⓘ **Pre-selected parameters**  
Parameters in this section come from configuration template and can't be edited.

<b>Result Price</b> Final Result Price	<b>Default Pricing Logic</b> Optimized Pricing Logic	<b>Target Currency</b> EUR
<b>Matrix Logic Element</b> Customer Region		

Continue Cancel

**Select and apply Price Setting Type** at Price List or Live Price Grid creation

**Allowed parameters can be overridden**, while locked parameters can't be changed



A man with dark hair, wearing a headset, is focused on his work at a desk. He is looking down at a laptop, with his hands positioned on the keyboard. The entire image is covered with a semi-transparent blue overlay. In the background, a large, faint white 'X' shape is visible. The text 'pricefx' is overlaid on the left side, and 'IMPORT MANAGER' is overlaid on the right side.

pricefx

**IMPORT MANAGER**

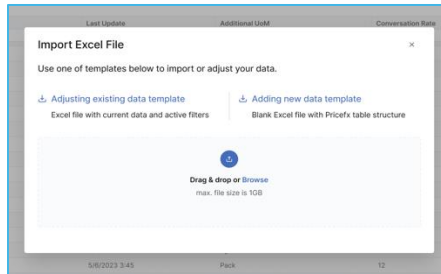
# IMPORT MANAGER ENABLES YOU TO WORK WITH DATA IN A NEW WAY

As an **alternative to the Pricefx Excel Client**, easily export, import and update data in a brand new in-app tool where the data is automatically validated / updated

As an **enhancement of import functionality**, import data in more places within the application for better experience

In both cases, **review the changes** after import, get detailed information on where the rows don't fit and make any necessary adjustments, before they are applied

# Data for Import



Item Type	Validation	Product ID	Last Update	Additional UoM	Conversation Rate
New	Error	Act19 IDPN	5/6/2023 3:45	Pack	12
New	Error	AGN2839	5/6/2023 3:45	Pack	12
New	Warning	AGN2839	5/6/2023 3:45	Pack	12
New	Warning	AGN9893	5/6/2023 4:54	Kg	5
New		AGN2839	5/6/2023 3:45	Pack	12
New		AGN9893	5/6/2023 4:54	Kg	5
New		AGN2839	5/6/2023 3:45	Pack	12
New		AGN9893	5/6/2023 4:54	Kg	5
New		AGN2839	5/6/2023 3:45	Pack	12
New		AGN9893	5/6/2023 4:54	Kg	5
Changed		AGN2839	5/6/2023 3:45	Pack	12
Changed		AGN9893	5/6/2023 4:54	Kg	5
Changed		AGN2839	5/6/2023 3:45	Pack	12
Changed		AGN9893	5/6/2023 4:54	Kg	5
Deleted	Error	AGN2839	5/6/2023 3:45	Pack	12
Unchanged		AGN9893	5/6/2023 4:54	Kg	5
Unchanged		AGN2839	5/6/2023 3:45	Pack	12
Unchanged		AGN9893	5/6/2023 4:54	Kg	5

Import data with the ability to add and update **whenever you need it**, using fewer screens and without needing to open additional tools. Available for Products and Product Extensions in version 14.0

**Export your data**, edit it in Excel or an alternative tool and upload it back to Pricefx for easier data updates

Modify your data **in the Excel way** you are used to, or filter them with the in-app tool, before confirmation

A person with dark hair, wearing a headset, is focused on their work at a desk. They are using a laptop, with their hands positioned on the keyboard. The entire image is covered with a semi-transparent blue overlay. Large, faint, light-blue geometric shapes, resembling stylized 'X' or 'V' characters, are layered in the background. The 'pricefx' logo is prominently displayed in the upper left area.

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VISUAL CONFIGURATION ENHANCEMENTS

**REUSABLE SNIPPETS**

# STREAMLINE YOUR WORK WITH REUSABLE VISUAL SNIPPETS AND KEEP THEM UP-TO- DATE

Use **visual configuration** to design price strategies in an intuitive drag & drop way, now even more efficiently with **reusable snippets**

Effortlessly **reuse selected groups of blocks** within other blocks in several price strategies, eliminating the need for repetitive copying and pasting

**Define snippets once** and see them dynamically adapt across all uses based on the parameters you set

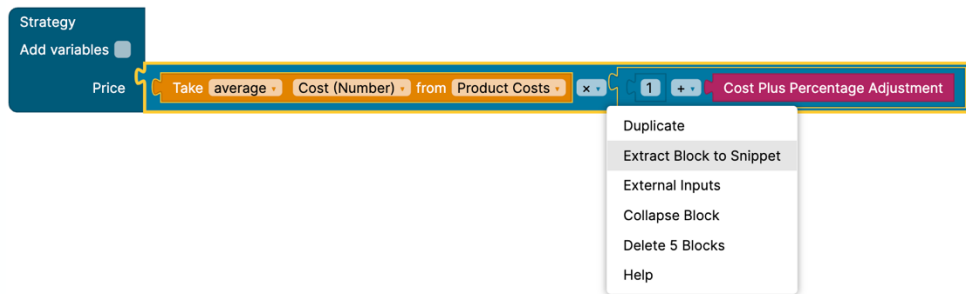
**Update snippets** to a new version, ensuring that these changes are automatically applied to all strategies using them

**Use snippets across multiple price strategies** in Strategy Designer

# Transform Your Blocks into Snippets

1

Select a group of blocks and extract them to a snippet



2

Adjust the snippet if needed



3

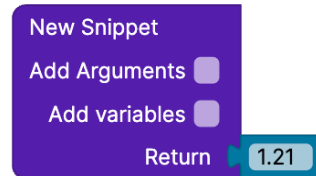
Finally, the snippet replaces the group of blocks in strategy for simpler and more convenient work





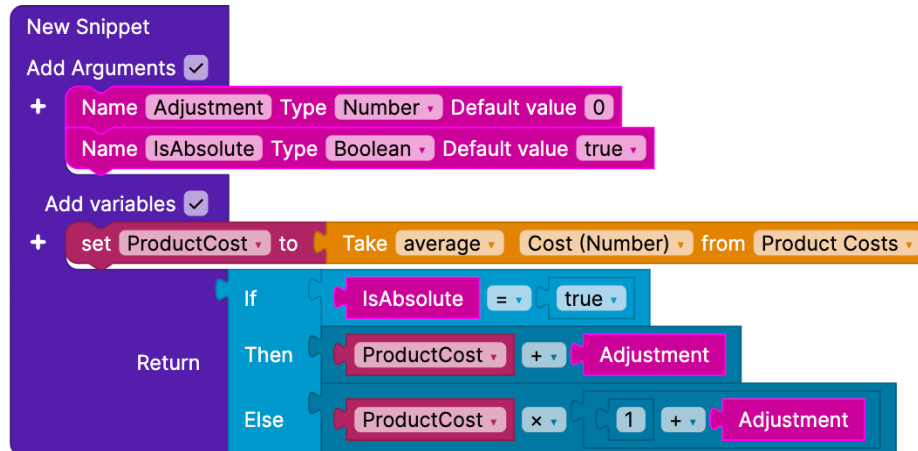
# Visual Snippets Can Be Simple or Advanced

## From Simple Snippets



In the **simplest form**, a Snippet block can only have a static number plugged into its Return output. When used, the output is just number

## To Complex Snippets



Perform **more complex operations**, such as passing arguments to the snippet and using them alongside variables integrated into advanced logical blocks

A person with dark hair, wearing a headset, is focused on their work at a desk. They are using a laptop, with their hands positioned on the keyboard. The entire scene is overlaid with a semi-transparent blue filter. Large, faint, light-blue geometric shapes, resembling stylized 'X' or 'V' marks, are visible in the background.

**pricefx**

# COLLABORATION WORKFLOW

PRE-RELEASE

# COLLABORATE ON QUOTE OR AGREEMENT CREATION WITH YOUR COLLEAGUES

**Team collaboration** is now possible at a **quote or agreement creation process** in Quoting or Agreements & Promotions

Useful in situations when various team members are responsible for **different types of line items** used within one quote or agreement

Definable **groups of line items** and respective **responsible users**

Users can collaborate on the creation **in parallel** or based on a **pre-defined order**

Available now as pre-release for your testing purposes

# Collaborate on Quote or Agreement Creation

The screenshot shows the 'pricefx' interface for 'partition\_name / Quoting / Quotes'. The main heading is 'P-1130 (2024 CH-DEMO - Univar - distributor order - DEMO)' with a 'Supply stage' indicator and 'In progress' status. Below this are tabs for 'Items for review', 'Other items', and 'Message'. The 'Items for review' tab is active, displaying a table with columns: Product, Review status, Quantity, Supply point, and Shipping price. The table lists 15 items, all of which are 'NyChem63A-B' with a quantity of 10 and a shipping price of \$11.70, supplied from 'Boston'. The review status for each item is either 'Accepted', 'Rejected', or 'To do'. A 'Mass edit' button and a 'Comments' button are visible above the table. At the bottom of the table, there is a summary bar indicating '4 selected item(s)' with buttons for 'Accept', 'Reject', and 'Comment'. On the right side, an 'Add Comment' dialog box is open, showing a comment text area with the message: 'There isn't sufficient quantity of selected products in specified supply points. Please chose different supply point.'

Product	Review status	Quantity	Supply point	Shipping price
NyChem63A-B	Accepted	10	Boston	\$11.70
NyChem63A-B	Rejected	10	Boston	\$11.70
NyChem63A-B	To do	10	Boston	\$11.70
NyChem63A-B	To do	10	Boston	\$11.70
NyChem63A-B	To do	10	Boston	\$11.70
NyChem63A-B	To do	10	Boston	\$11.70
NyChem63A-B	To do	10	Boston	\$11.70
NyChem63A-B	To do	10	Boston	\$11.70
NyChem63A-B	To do	10	Boston	\$11.70
NyChem63A-B	To do	10	Boston	\$11.70
NyChem63A-B	To do	10	Boston	\$11.70
NyChem63A-B	To do	10	Boston	\$11.70
NyChem63A-B	To do	10	Boston	\$11.70
NyChem63A-B	To do	10	Boston	\$11.70
NyChem63A-B	To do	10	Boston	\$11.70
NyChem63A-B	To do	10	Boston	\$11.70

- **Accept or Reject** selected line items assigned to a specific user
- Place optional **comments** per line item
- See the **status** of all the line items

A person with dark hair, wearing a headset, is focused on a laptop screen. The image is overlaid with a semi-transparent blue filter. The 'pricefx' logo is positioned on the left side, and the title 'PLATFORM MANAGEMENT ENHANCEMENTS' is on the right.

**pricefx**

# PLATFORM MANAGEMENT ENHANCEMENTS



# Platform Management Enhancements

## Event Workflows

Event Workflows now support the following features:

- Read-only access
- Notifications – receive a Notification for failed or successful workflow executions
- Dynamic Step Skipping – a Workflow Step can be skipped by an Event, allowing for better control over the Workflows
- Generic Scheduler – trigger an action on a Partition or IntegrationManager using a Scheduler, which supports both favorite (Daily, Monthly...) as well as fully custom (Cron) schedules
- Parallel actions triggering –trigger multiple actions from a Workflow
- Manual triggering – when an Event is not published by a Partition or IntegrationManager by an error, it is now possible to resume a Workflow from a stuck step

## Data Management

- PlatformManager now allows the user to download a table from a Partition and either retrieve it from PlatformManager UI or to download it from a selected SFTP server

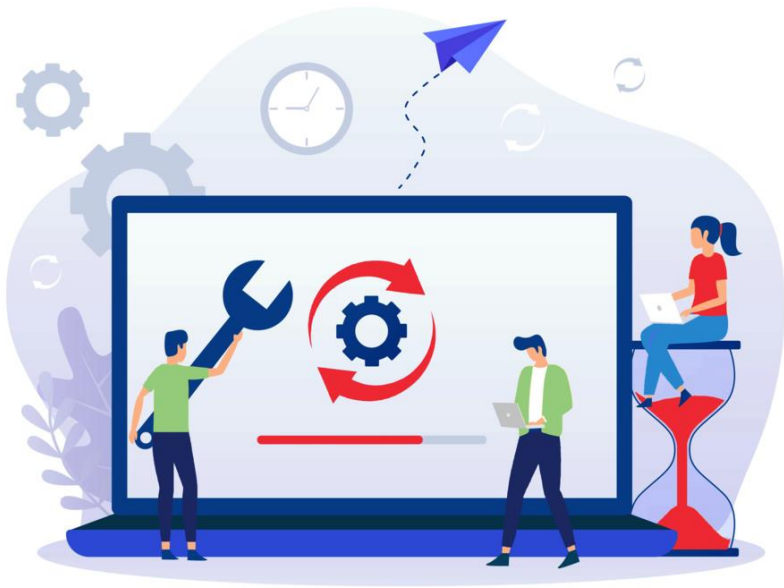


A person with dark hair, wearing a headset, is focused on their work at a desk. They are using a laptop, with their hands positioned on the keyboard. The entire image is covered with a semi-transparent blue overlay. In the background, another person is partially visible, also working. A large, faint white 'X' graphic is centered in the background.

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# **PRICEFX RELEASE POLICY**

# Pricefx N-1 Release Policy



Pricefx provides official support for the latest 2 releases. Currently, **Clover Club 12.x** and **Rampur 13.x** releases meet this condition

Once the **Caribou Lou 14** release is made available, all our customers will be required to use either **Caribou Lou 14.x** (*N release*) or **Rampur 13.x** (*N-1 release*)

If you are on the **Clover Club 12** release, we encourage you to start planning for the **upgrade to Rampur 13 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.