



pricefx

CAPABILITY OVERVIEW

Pricefx Product Recommendation Optimization



Pricefx Product Recommendation Optimization

Guide sales teams toward the right products at the right time to improve quote outcomes and order value.



Pricefx Product Recommendations helps organizations intelligently recommend relevant products to sales representatives - typically during quote creation - based on customer behavior, product relationships, and strategic objectives. By surfacing meaningful alternatives and add-ons in context, it supports higher quote conversion, larger order sizes, and more effective product promotion.

With Product Recommendations , pricing, sales, and finance teams can:

- ✓ **Recommend relevant products directly within quoting workflows.**
- ✓ **Increase quote conversion by better matching customer needs.**
- ✓ **Grow order value through intelligent cross-sell and up-sell.**
- ✓ **Promote strategic or preferred products, including private labels.**
- ✓ **Leverage transaction data to guide consistent recommendations.**
- ✓ **Pass recommendations seamlessly to ERP, CRM, and other core systems.**
- ✓ **Ensure governance through streamlined approval workflows.**



The result:

More effective quotes, larger deals, and scalable product guidance embedded in everyday sales processes.

THE CHALLENGE

Sales Teams Lack Contextual Product Guidance



When creating quotes, sales representatives are often left to rely on memory, product familiarity, or trial-and-error to suggest alternatives or additional products. This is especially challenging in large catalogs or complex product portfolios.

On the front lines:



Pricing teams

Pricing teams lack a consistent way to guide product recommendations aligned with strategy.



Marketing teams

Marketing teams miss opportunities to increase order size or promote strategic products.



Sales teams

Sales teams struggle to identify relevant alternatives or complementary products during quoting.



The impact:

- Revenue loss from missed upsell opportunities
- Margin degradation caused by discount-driven alternatives instead of value-based options
- Inconsistent deal quality from unguided, salesperson-specific product suggestions
- Margin loss from missed marketing promotions on strategic product

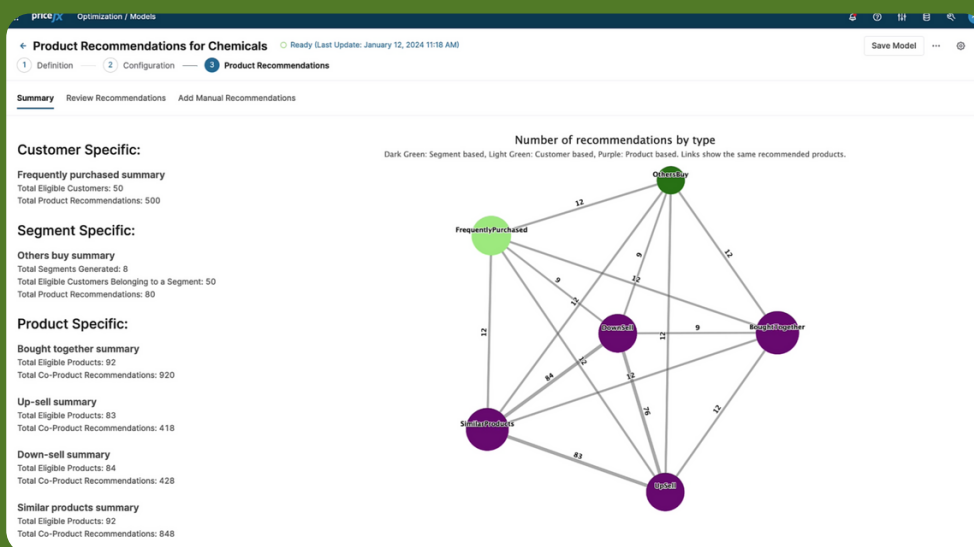
Without data-driven recommendations embedded directly into the quoting process, product suggestions remain inconsistent, reactive, and difficult to scale—limiting both conversion rates and revenue potential.

What Is Pricefx Product Recommendation Optimization?

Pricefx Product Recommendations is an optimization accelerator that computes and delivers product suggestions based on historical transaction patterns, customer similarity, and product relationships. Recommendations are designed to support sales representatives during quote creation by offering relevant alternatives, complementary products, or strategically preferred options.

The accelerator generates recommendations that can be used across the Pricefx platform, with a primary focus on seamless integration into Quoting workflows.

Product Recommendations (Setup & Use in Quoting)



Select Products

All Items Recommended

Active Filter: "Pricing Logic" is null Edit Filter Clear Filter

Category Name	Product Name	Product Group	Sub Product Group / Sub Category	Business Unit
☐ Customer	APC RS 1000VA Sinewave Battery Backup 100V	Uninterruptible Power Sup...	Computer and Peripheral	Residential and Small B...
☐ Customer	Back UPS PRO BN 1100VA, 10 Outlets, 2 USB Charging Ports, AVR, LCD int...	Uninterruptible Power Sup...	Computer and Peripheral	Residential and Small B...
☐ Customer	Merten - Wisner Home Touch with wall mount white	Home Automation	Wiser Smart Home	Residential and Small B...
☐ Product history	DT60 - circuit breaker - DT60N - 4P - 40A - C curve	Electrical Protection and C...	Acti9 Miniature Circuit Breakers - MCBs	Residential and Small B...
☐ Product history	Energy Efficiency - ION Setup 3.0	Services	EcoStruxure Energy and Sustainability S...	Residential and Small B...
☐ Product history	Energy Efficiency - Electrical Safety Training	Services	EcoStruxure Energy and Sustainability S...	Residential and Small B...
☐ Product history	Energy Efficiency - Electrical distribution operation and management	Services	EcoStruxure Energy and Sustainability S...	Residential and Small B...
☐ Product history	Rocker for 2-gang push-button module, sahara, System Design	Home Automation	Wiser Smart Home	Residential and Small B...
☐ Product history	Rocker for 2-gang push-button module, lotus white, System Design	Home Automation	Wiser Smart Home	Residential and Small B...
☐ Product history	Rocker for 2-gang push-button module, stainless steel, System Design	Home Automation	Wiser Smart Home	Residential and Small B...
☐ Product history	IDPN - circuit breaker - IDPN N - 1P + N - 13A - B curve	Electrical Protection and C...	Acti9 Miniature Circuit Breakers - MCBs	Residential and Small B...
☐ Product history	Energy Efficiency - Energy and Sustainability Software	Services	EcoStruxure Energy and Sustainability S...	Residential and Small B...
☐ Customer Segment	Multifit Air, apparatus box, 3 gangs, 67x40 mm	Light Switches and Electric...	Boxes and Accessories	Residential and Small B...

Select Add to New Folder Cancel

BENEFITS

Why Teams Choose Pricefx Product Recommendations



Pricefx Product Recommendations transforms product suggestion from an ad hoc activity into a structured, repeatable capability.

For Pricing Teams

- Guide product promotion using data-driven logic
- Support cross-sell, up-sell, and brand strategies
- Improve consistency of recommendations across teams



For Sales & Commercial Teams

- Receive relevant product suggestions during quote creation
- Offer meaningful alternatives when customers push back on price
- Increase confidence when proposing additional or substitute products

For Technical & Operations Teams

- Embed recommendations directly into quoting processes
- Reduce reliance on individual product knowledge
- Support scalable sales execution across large catalogs



FEATURES

What Pricefx Product Recommendations Deliver

Pricefx Product Recommendations provides multiple recommendation types that can be configured based on business needs and available data.



1

Transaction-Based Recommendations

- Frequently Purchased: Products previously bought by the same customer, weighted by purchase frequency
- Others Buy: Products purchased by similar customers within the same segment
- Bought Together: Products commonly purchased together in the same basket or invoice

2

Similarity-Based Recommendations

- Similar Products: Products with similar names, descriptions, or attributes
- Similar from Another Brand: Comparable products from a different brand, often used to promote private labels
- Up-Sell: Higher-margin alternatives to support order value growth
- Down-Sell: Lower-priced alternatives to support quote revisions

3

Flexible Deployment & Integration

- Recommendations are stored in model tables for reuse
- Can be evaluated for a specific scope
- Integrated out of the box with Quoting
- Code examples available for item-level recommendations



GETTING STARTED

Embed Intelligent Product Guidance into Quoting

Move beyond manual product suggestions and inconsistent cross-sell. Pricefx Product Recommendations enables scalable, data-driven recommendations directly within your sales workflows.



Request a live demo tailored to your pricing processes, strategies, approval flows, and system landscape.

See It in Action

Learn More

Explore related resources on the [AI Optimization Page](#), or see how [complementary Pricefx capabilities](#) - such as Agents, Rebates, Channel Management, and Price Setting - help pricing and sales teams make smarter, faster price decisions.