

pricefx



CAPABILITY OVERVIEW

Pricefx Channel Management



Pricefx Channel Management

Automate ship and debit claims handling, validate against agreements, and execute payouts seamlessly through ERP integration.



Pricefx Channel Management enables manufacturers selling through distributors to automate the handling of ship and debit claims, validate them against existing agreements and quotes, and execute pay-outs through seamless ERP integration. It replaces manual, error-prone processes with a centralized, automated system that ensures accuracy and reduces reconciliation effort.

With Channel Management, pricing, finance, and operations teams can:

- ✓ **Automate validation of distributor claims against rebate agreements, special pricing agreements, incentives, and quotes.**
- ✓ **Flag exceptions requiring manual approval while auto-validating claims.**
- ✓ **Define approval workflows with required steps, conditions, and approvers.**
- ✓ **Integrate with ERP systems to issue credit memos and execute pay-outs.**
- ✓ **Forecast accruals on orders or invoices and track program performance.**
- ✓ **Reduce manual reconciliation and the risk of erroneous payouts.**
- ✓ **Gain visibility into program eligibility, validity, and exceptions.**



The result:

Faster claims processing, reduced errors, stronger distributor relationships, and seamless alignment with your ERP and financial systems.

THE CHALLENGE

Manual Claims Processing Drains Resources and Erodes Trust



In many organizations, ship and debit claims from distributors are handled through manual, offline processes—Excel spreadsheets, legacy systems, and disconnected workflows that make validation slow, error-prone, and resource-intensive.

On the front lines:



Pricing and commercial teams

Pricing and commercial teams cannot forecast program success or evaluate the effectiveness of distributor incentives.



Operations teams

Operations teams struggle with prolonged unresolved claims periods and lack of supporting documentation.



Finance teams

Finance teams spend excessive time manually reconciling claims against agreements and quotes.

When claims data is spread across multiple IT tools with no single source of truth, disputes lack proof of sale or invoice details, and pay-out errors become common.



The impact:

- Inaccurate or delayed claim validation leading to distributor dissatisfaction.
- Overpayments or underpayments due to manual errors.
- Inability to forecast accruals and evaluate program ROI.

Without a systematic, automated way to validate claims, control approvals, and execute payouts, organizations risk margin leakage, partner frustration, and operational inefficiency.

CAPABILITY OVERVIEW

What Is Pricefx Channel Management?

Pricefx Channel Management provides a centralized, automated solution to receive, validate, and process ship and debit claims from your distributors.

It matches incoming transactions, point-of-sale data, and claims against your rebate agreements, and ship & debit quotes. The platform auto-validates compliant claims while flagging exceptions that require manual review, ensuring systematic and timely processing.

With configurable approval workflows, you maintain full control over claim disposition—defining steps, conditions, thresholds, and approvers that match your internal policies. Once approved, claim records flow directly to your ERP system to issue credit memos and execute pay-outs.

Channel Management (Claims Validation)

Options

Label
Stanley Linda CPA France Q4 Claim

Claim Type
Claim Logic

Effective Date
10/14/2020

Customer
CID-0011

External Reference

File Name
Upload
Claim NewCo2.xlsx

Overview

Status
Ready

Name
CL-52

Claim Status
Draft

Workflow Status
Draft

Payout ID

CL-52

Recalculate Submit View Workflow

Items

ProductID	CustomerID	Status	Quantity	Total Amount	Validation State
A9N2103			350	350	Auto Rejected
BR1200S-JP			25	25	Validated
C2			75	150	Validated
R9H13602			120	120	Auto Rejected
MEG5220-6033			50	100	Auto Rejected

5 rows

Summary

Label	Items	Total Amount
Automatically Validated	0	0.00
Automatically Rejected	3	570.00
Not Validated	0	0.00
Manually Validated	2	175.00
Manually Rejected	0	0.00

5 rows

Label	Items	Total Amount
Total items in Claim	5	745.00
Total Validated	2	175.00
Total Rejected	3	570.00
Total Paid Out	0	0.00
Total Remaining To Pay	0	0.00

5 rows

BENEFITS

Why Pricing, Operations, and Finance Teams Choose Pricefx Channel Management



Pricefx Channel Management transforms claims processing from a manual, error-prone burden into an automated, controlled workflow. It empowers finance, operations, and commercial teams to process claims faster, reduce errors, and strengthen distributor relationships.

For Pricing & Commercial Teams

- Gain visibility into program eligibility, validity, and exceptions
- Evaluate the success of channel programs and optimize incentive structures



For Operations Teams

- Shorten claims resolution cycles with automated processing
- Maintain complete audit trails with supporting documentation for disputes

For Finance Teams

- Forecast accruals on orders or invoices with greater accuracy
- Reduce pay-out errors through systematic validation and ERP integration



BENEFITS

What Pricefx Channel Management Delivers

Pricefx Channel Management delivers the unique combination of automated ship and debit claims handling with systematic validation against rebate agreements, special pricing, incentives, and quotes. Unlike manual spreadsheets or disconnected legacy systems, Pricefx connects claims directly to your sales and ERP systems, creating a controlled, automated workflow.



1

Automated Claim Handling

- Receive and process ship and debit claims from distributors automatically
- Claims can be submitted via file upload or API integration, with all claim details captured systematically

2

Claim Validation Against Agreements

- Match transactions, POS data, and claims against rebate agreements, and ship & debit quotes
- Auto-validate compliant claims while flagging exceptions

3

Allocation Grid & Visibility

- View related quotes, or agreements, and track how claims match approved quantities or comply with other program requirements
- Access detailed problem reports for dispute resolution

4

Configurable Approval Workflows

- Define approval workflows with flexible steps, conditions, thresholds, and approver assignments
- Support parallel approvals and approval delegation

5

ERP Integration for Pay-outs

- Create claim records automatically for export to your ERP system
- Issue credit memos and execute related pay-outs with reduced manual intervention

6

Analytics & Forecasting

- Forecast accruals on orders or invoices and evaluate the success of channel programs
- Track claim status summaries and monitor pay-out amounts in real time

GETTING STARTED

Transform Your Channel Claims Process

Move from manual, spreadsheet-driven claims processing to a single, automated system that validates claims, controls approvals, and executes pay-outs through your ERP. Pricefx Channel Management gives organizations accuracy, speed, and confidence, delivering stronger distributor relationships and reduced errors.



Request a live demo tailored to your ship and debit processes, distributor network, and system landscape.

See It in Action

Learn More

Explore related resources on the [Channel Management page](#), or see how complementary Pricefx capabilities—such as Quoting, Rebate Management, Price Management, and AI Optimization—help pricing and sales teams make smarter, faster price decisions.