



pricefx

CAPABILITY OVERVIEW

Pricefx Quoting



Pricefx Quoting

Empower sales teams to create profitable, custom quotes in minutes with AI-powered guidance and complete deal transparency.



Pricefx Quoting gives sales teams a fast, intuitive way to configure products, calculate prices, and generate quotes that maximize both win rates and profitability. It replaces slow, manual quoting processes and disconnected tools with an intelligent quoting engine that guides sellers to the right price on every deal.

With Quoting, sales, pricing and finance teams can:

- ✓ **Create tailored quotes quickly based on a product catalogue and support decisions with relevant in-line analytics.**
- ✓ **Price confidently with predefined rules & AI-powered Price guidance.**
- ✓ **Drive deal value with upsell / cross-sell AI-powered recommendations.**
- ✓ **Include all deal elements - list prices, discounts, rebates, freight costs, and more - in a single transparent calculation.**
- ✓ **Accelerate approvals with automated workflows that route quotes to the right decision-makers including complex situations.**
- ✓ **Work seamlessly within CRM systems like Salesforce, SAP Sales Cloud, ...**
- ✓ **Convert approved quotes to deals and push data to ERP for order execution.**



The result:

Faster quote cycles, higher win rates, stronger deal profitability, and seamless integration with ERP / CRM, and other sales systems.

THE CHALLENGE

Slow, Manual Quoting Costs You Deals and Margin



In many organizations, sales teams struggle with fragmented, manual quoting processes that slow down deal cycles and create inconsistent pricing across the sales force. Without the right tools and guidance, every quote becomes a time-consuming exercise in data gathering, spreadsheet building, and internal negotiations.

On the front lines:



Sales teams

Sales teams spend hours configuring products, calculating prices manually, and chasing down approvals across email chains.



Pricing teams

Pricing teams have no visibility into what prices sales is actually quoting, leading to uncontrolled discounting and margin erosion.



Finance teams

Finance teams can't accurately forecast deal profitability because quotes don't capture all cost elements like rebates, freight, and terms.

When customers request quotes, the response time can be painfully slow. Multiple handoffs between sales, pricing, and finance stretch what should be a simple quote into days or weeks - giving competitors time to win the deal.



The impact:

- Lost deals due to slow quote turnaround and unresponsive sales processes
- Inconsistent deal profitability as quotes miss critical cost factors like rebates, freight, and payment terms
- Low win rates from quotes that don't reflect optimal pricing or product mix

Without a unified, intelligent quoting solution, companies either slow down to ensure accuracy or speed up and sacrifice profitability, putting revenue and margin at risk.

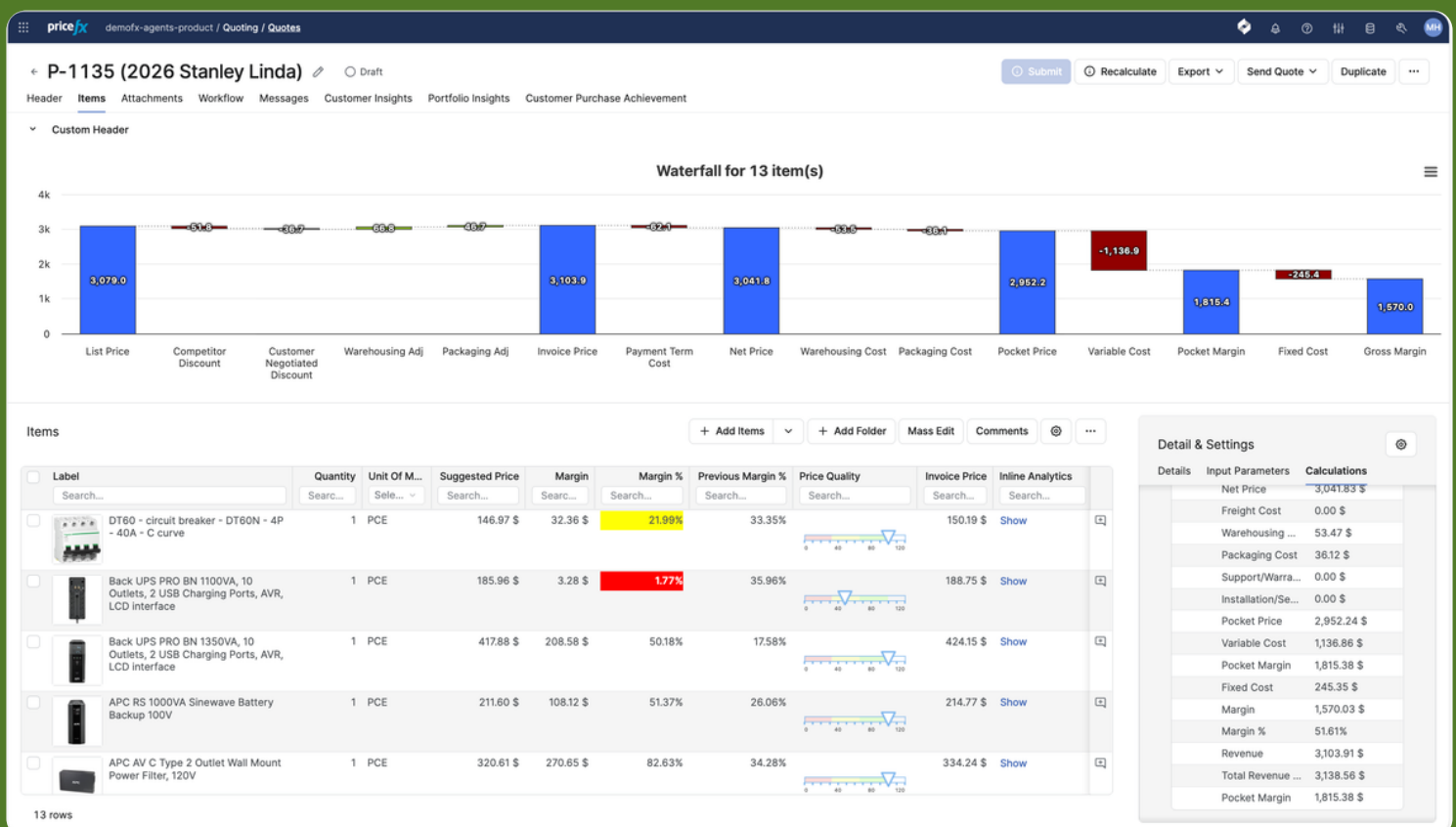
What Is Pricefx Quoting?

Pricefx Quoting is a configure-price-quote (CPQ) solution that enables sales representatives to create custom, profitable quotes quickly and intuitively, with full transparency into deal profitability at every step.

It connects to your CRM and ERP, bringing together product catalogs, customer data, pricing rules, and cost information into a single intelligent quoting environment. Sales teams can configure complex products, apply customer-specific agreements, and calculate complete deal pricing - including discounts, rebates, freight charges, and others.

Once quotes are configured and calculated, automated approval workflows route them to the right stakeholders based on customizable rules around discount levels, deal size, and margin thresholds. When deals close, quote data flows automatically to ERP systems as price conditions for sales orders creation, ensuring seamless execution.

Quoting (Optimized pricing and guided selling)



BENEFITS

Why Sales, Pricing & Finance Teams Choose Pricefx Quoting



Pricefx Quoting transforms the quoting process from a slow, manual activity into a fast, guided workflow that drives both win rates and profitability. It empowers sales teams to respond quickly while giving pricing and finance teams complete visibility and control.

For Sales & Commercial Teams

- Create custom quotes in minutes with intuitive product configuration
- Access complete customer insights and purchase history
- Work within familiar CRM tools like Salesforce, SAP Sales Cloud, ...



For Pricing Teams

- Provide sales with clear pricing guidance and guardrails that protect margins while maximizing win rates
- Reduce price variance across the sales force with consistent pricing rules and logic

For Finance & Operations

- Improve forecast accuracy with visibility into deal profitability including all cost factors
- Ensure quotes capture rebates, freight charges, payment terms, and other profitability inputs



BENEFITS

What Pricefx Quoting Delivers

Pricefx Quoting delivers speed, accuracy, and intelligence - empowering sales teams to quote faster while pricing teams maintain control over profitability. Unlike legacy systems that require IT support for every change, Pricefx provides intuitive product configuration, real-time calculations, and AI-powered guidance.



1

Fast, Intuitive Quote Creation

- Support for pricing in all manufacturing processes: make-to-order (MTO), assemble-to-order (ATO), make-to-stock (MTS), and build-to-order (BTO)
- Flexible quote types with configurable templates for different business scenarios across different business units or geographies
- Role-based collaboration workflows allowing pricing, sales, finance, and operational teams to work in parallel on quote pricing before approval

2

Enhanced by Pricefx AI Capabilities

- Price guidance providing optimal prices for every product-customer combination
- Win rate optimization balancing deal win rates with profitability
- Product recommendations identifying relevant cross-sell and upsell opportunities (product substitutes, complements, ...)

3

Complete Deal Transparency

- Visual price waterfall showing all pricing components: list price, discounts, adjustments, costs, and resulting margin
- Inline analytics displaying key business KPIs, customer sales history and other insights along with customer and sales insights

4

Automated Workflows & Approvals

- Workflows with custom steps, conditions, and approvers
- Complete audit trails for compliance

5

Seamless Systems Integration

- Native integration with CRMs such as Salesforce, SAP Sales Cloud, and others
- Automated creation of price records and conditions in ERP systems
- Flexible condition record structures that align with ERP

CUSTOMER STORIES & OUTCOMES

Real Results from Quoting Driven Organizations

Global manufacturers, distributors, and process industry leaders use Pricefx Quoting to accelerate sales cycles, improve win rates, and protect deal profitability.



Global Leader in Packaging

Reduced time to approve quotes by 50%. Sales teams are more agile and responsive, with thousands of quotes created each week.



Global Energy Leader

Unified pricing, quoting, and order-to-cash across units—improving price consistency and cutting quote cycle time by over 30%.



North American Distributor

Integrated Pricefx with SAP Sales Cloud for real-time, omnichannel pricing that boosted quote efficiency and revenue accuracy.



Industrial Technology Manufacturer

Empowered sales teams with AI-powered Price guidance, resulting in higher win rates and 2-3% deal margin improvement.

Across industries, Pricefx Quoting delivers a unified, intelligent solution that helps sales teams quote faster, price smarter, and close more profitable deals.

GETTING STARTED

Transform Quoting into a Competitive Advantage

Move from slow, manual quoting processes to an intelligent solution that guides sales teams to the right price on every deal. Pricefx Quoting gives organizations speed, control, and confidence - delivering higher win rates, stronger margins, and faster sales cycles.



Request a live demo tailored to your quoting workflows, product catalog, and system landscape.

See It in Action

Learn More

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