

A governed dealer pricebook

The commercial challenge

The same product can be quoted through direct, dealer, and contract sales under different authorized prices. Duplicate SKUs and emailed spreadsheets create avoidable version conflicts.

What the companion workbook includes

Six sheets: start guide, stable SKU catalog, channel prices with margin formulas, approval register, and rollout QA.

The examples are fictional and are not guaranteed to match QuotePoint import formatting.

Start here

Visit quotepoint.net/resources/dealer-pricebook-template and download the editable Excel workbook.

One SKU. Multiple price contexts.

Identity before price

Maintain a stable product identifier that means the same item across channels. Separate channel prices from catalog identity.

Define tier or contract eligibility and effective dates. Do not expose restricted cost fields to unauthorised dealers.

Govern the exception

Document the commercial thresholds that require review, the responsible approver, and the exact quote evidence needed.

Normal quotes should proceed within policy; exceptions should retain their approval trail.

Pilot a representative product family

Weeks 1 and 2

Select one high-volume equipment family and ten recent real-world quotes. Clean SKU duplication, stale prices, and tier ambiguity.

Document required accessories and commercial exclusions.

Weeks 3 and 4

Run normal and exception quotes in the target workflow. Compare configuration, margin, discount review, document totals and customer context.

Capture baseline quote preparation time and correction frequency.

Data governance

Do not share the master workbook after replacing the fictional values with proprietary costs or negotiated prices.

Make your pricebook defensible

Go-live checklist

Can a seller identify the source SKU, applicable price, authorized channel and effective date?

Does an out-of-policy discount route to the correct owner?

Do approved line items match the customer quote?

Can historical quote and pricing decisions be reconstructed?

Next steps

Pair the editable workbook with the vendor-neutral CPQ requirements checklist and the interactive ROI calculator.

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