

Quote Management

Create, approve, and track quotes with structured workflows, pricing controls, and real-time pipeline visibility.

Specification

SKU	BUS-SLS-QTE
Solution area	Business Operations
Works with	Sales CRM, Proposal Management, Contract Lifecycle Management (CLM), Revenue Operations & Forecasting
Updated	Sep 26, 2026
Datasheet	v1.0

What it is

Quote Management is the process of creating, reviewing, approving, and tracking customer quotes for products and services. It ensures that pricing, discounts, terms, and approvals are managed consistently so sales teams can move deals forward with speed and confidence.

SmartSuite’s Quote Management solution provides a structured, scalable system to create, manage, approve, and track customer quotes across the sales lifecycle. It enables organizations to move from manually assembled spreadsheets, disconnected documents, and inconsistent approval processes to a centralized, workflow-driven quoting system.

With a centralized system of record, sales teams gain full visibility into quote history, pricing decisions, approval status, and deal progression.

Core capabilities

Quote Creation & Management

Create structured quotes for products, services, and bundled offerings.

Pricing & Discount Controls

Manage pricing rules, discount thresholds, and exceptions.

Approval Workflow Automation

Route quotes through finance, sales leadership, or operations for approval.

Quote Versioning & Revision Tracking

Maintain visibility into quote updates and changes over time.

Product & Service Line Item Management

Build quotes with clear line items, quantities, pricing, and terms.

Opportunity & Pipeline Integration

Connect quotes directly to opportunities and deal stages.

Customer-Ready Quote Packages

Prepare standardized, branded quote documents for external delivery.

Real-Time Status Tracking

Track quote progress from draft to approval to customer delivery.

Audit Trails & Documentation

Maintain full traceability for pricing decisions, approvals, and revisions.

The Quote Management Lifecycle

Step 1 Create Quote Build a quote using approved products, services, and pricing structures.	Step 2 Apply Pricing & Terms Define line items, discounts, and commercial details.	Step 3 Route for Internal Approval Send quotes through approval workflows when thresholds or exceptions apply.	Step 4 Deliver Quote to Customer Share approved quotes with prospects or customers.	Step 5 Track Progress & Convert Monitor status, manage revisions, and connect quotes to closed business.
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Who it is for

Sales Teams Create quotes and move deals forward efficiently.	Sales Leaders Oversee pricing discipline and quote approvals.	Revenue Operations Teams Standardize quoting workflows and improve process consistency.
Finance Teams Review pricing, discounts, and financial controls.	Deal Desk / Sales Operations Support quote accuracy, packaging, and approvals.	Executive Leadership Gain visibility into quote activity and commercial performance.

Works with

Sales CRM Provides account, contact, and opportunity data for quote creation.	Proposal Management Supports broader sales packages and customer-facing documents.
Contract Lifecycle Management (CLM) Transitions approved commercial terms into formal agreements.	Revenue Operations & Forecasting Tracks quote impact on pipeline and forecast visibility.

Built differently. Quote Management runs on the same relational platform as every other SmartSuite product, so its records link to the risks, controls, issues and evidence they affect, and every report reflects the current state rather than a copy.

See it working with your data

Ask your SmartSuite account team for a demo of Quote Management configured for your organization, or read the full product entry at smartsuite.com/products/quote-management.

Schedule a demo