

Quote & Solution Engine

\$25,000–\$75,000+

ONE-TIME BUILD

Turn customer requirements into a checked configuration, scoped BOM, and quote your team can approve.

BEST FIT

Telecom and channel sales and engineering teams with repeatable solution types, complex catalogs, or frequent clarification between discovery and quote.

A request for backup connectivity or POTS replacement arrives without all the site, network, or installation details. The engine collects required inputs, applies approved selection and pricing rules, and flags the gaps that need an engineer or commercial reviewer.

— What you receive

Guided intake

Capture requirements, sites, quantities, network needs, existing equipment, and the inputs required for the selected solution type.

Configuration and BOM logic

Apply approved selection, accessory, service, licensing, and dependency rules to create a bill of materials.

Controlled pricing

Calculate approved prices, totals, and internal economics in software using agreed commercial rules.

Verification and review

Check missing data, documented lifecycle constraints, dependencies, and approval thresholds before release.

Customer output and handoff

Generate a branded quote, scope, assumptions, and exclusions. Deliver validation examples and operating instructions.

— A focused starting scope

A focused entry scope uses one approved catalog, one pricing source, one intake flow, one output format, and one approval workflow. The proposal names the solution category and the catalog preparation included.

— Delivery

01

Define the quote contract

Agree required inputs, approved products, calculation rules, and reviewer responsibilities.

02

Build the workflow

Connect intake to configuration, pricing, checks, and internal review.

03

Prove the output

Run known quotes and exception cases, confirm the customer view, and hand over the approved release process.

— What we need from you

Approved catalogs, pricing and margin rules, successful quotes, known failure cases, output templates, solution requirements, and named engineering and commercial reviewers.

— How we confirm it's ready

Known examples reproduce the approved calculation results. Missing required inputs stop or flag the quote as agreed. Customer exports exclude cost, margin, compensation, and internal notes. Release requires the designated approval.

— Scope boundaries

Site suitability, coverage, specialist design, and life-safety requirements need qualified review and supporting evidence. Inventory, ordering, carrier portals, and CRM writes are included only when expressly scoped. The model does not invent prices or product facts.

— Investment and options

Catalog preparation, solution branches, pricing rules, quote formats, permissions, and integrations determine the fee. Complex multi-system builds may fall in the \$75,000–\$150,000+ range after discovery.

MSP Quote & Bundle Preflight, Quote & Design Preflight, Device Selector Lite, and Site Survey-to-BOM are focused entry patterns within this offer. The engine includes the sources and rules needed for its own quoting workflow; a separate Knowledge & Pricing Intelligence System is for sharing that information across research, sales, support, or lifecycle work.

Planning ranges in USD; scope and fees are confirmed in a written proposal. Assessment, implementation, and ongoing care are priced separately unless combined. Third-party software, model usage, hosting, data feeds, travel, and applicable taxes are additional unless included.

Start with a fit call

Bring a completed quote and one that went wrong. I'll scope the first repeatable quote path.

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