



Teamcenter Configure & Quote - User Guide

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Leveraging Teamcenter data in Salesforce for product pricing and quote generation

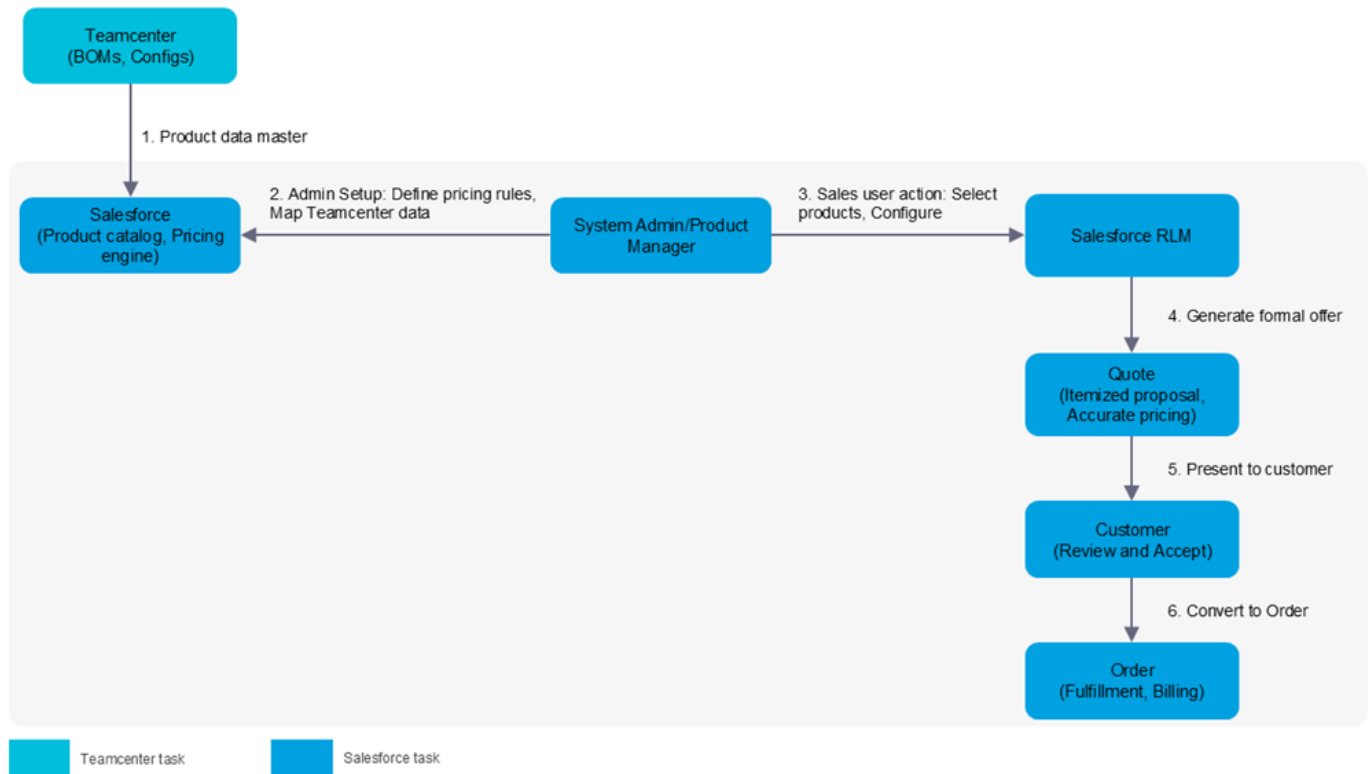
With the Siemens Teamcenter and Salesforce RLM integration, the sales team effortlessly generates accurate quotes for complex products, knowing that the pricing is always up-to-date and reflects the latest engineering data.

Note
Essentially, a quote formally offers a customer the products or services they are interested in, specifying their quantities, proposed prices, and terms and conditions. It clearly outlines exactly what the customer will receive and at what cost.

Teamcenter stores BOMs, product configurations, cost data, engineering changes, and product attributes information, which Salesforce uses when integrated with Teamcenter. Salesforce serves as a quoting engine that centralizes customer data, presents a complete product catalog, and applies pricing rules based on quantity, discounts, customer type, and configuration. With these inputs, Salesforce generates professional quotes and, once accepted, converts them into orders, closing the loop from inquiry to delivery. In short, Teamcenter provides the accurate product data, while Salesforce leverages it to streamline pricing, quoting, and order management.

Role	Activities	Benefits
System Administrator/Product Manager	- Define pricing rules - Configure products and map data - Ensure data integrity - Create quotes (Optional)	Control efficiency and accuracy of pricing and product setup
General Salesforce User (Sales Representatives/Account Managers)	- Create quotes - Configure products within constraints	- Focus on sales - Generate quotes quickly - Avoid pricing complexities

The diagram illustrates the streamlined process from product definition to a customer ready quote.

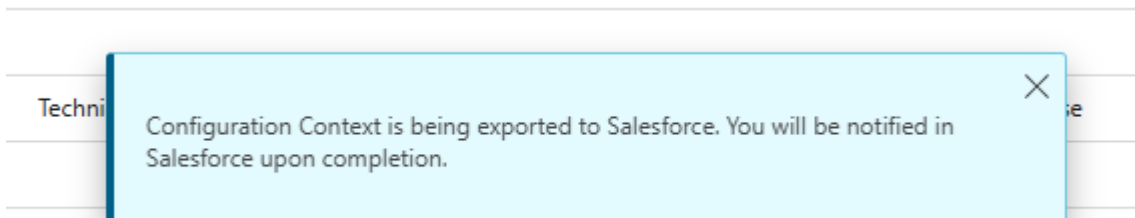


Export Teamcenter data to Salesforce for product pricing

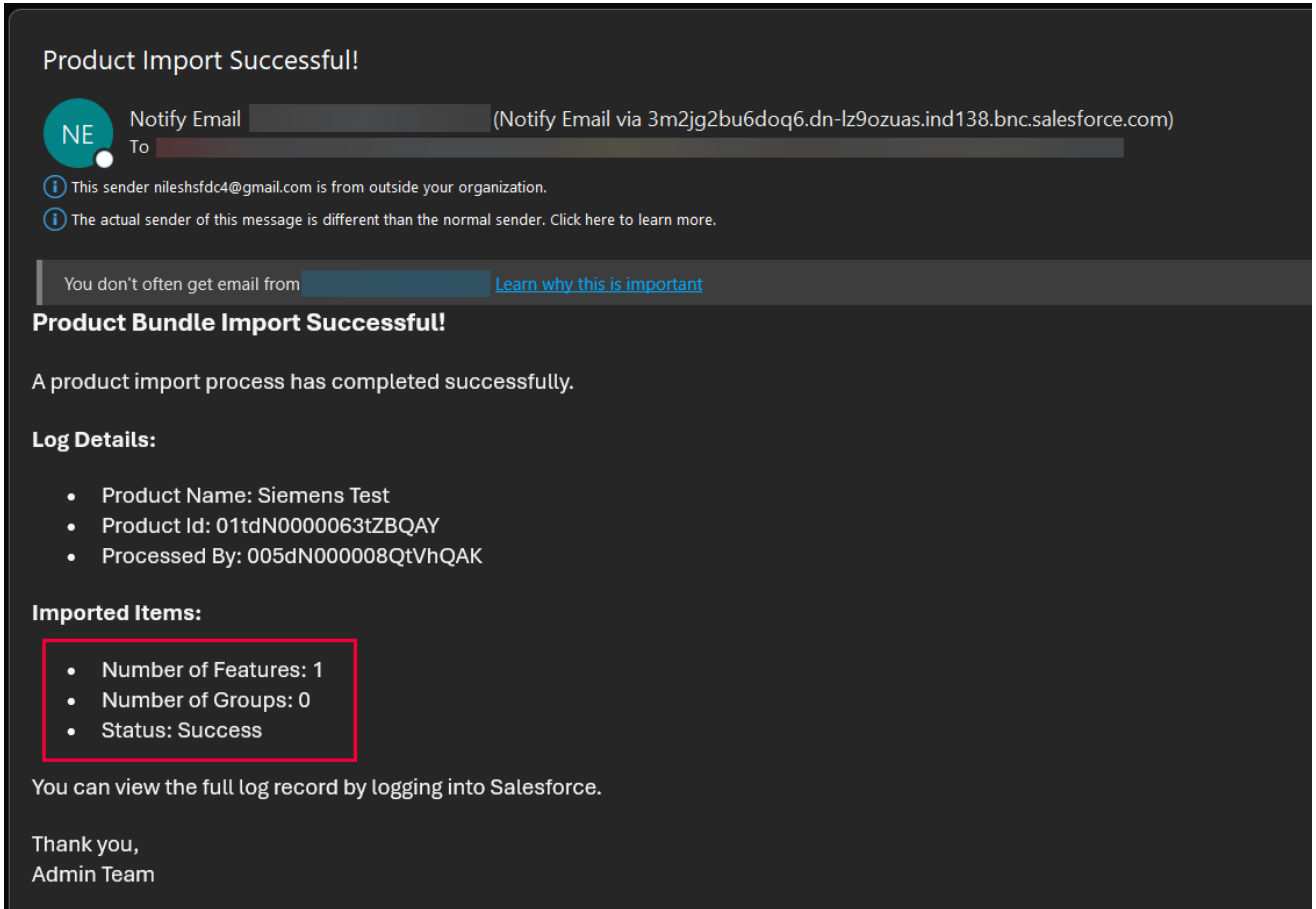
You can now export Teamcenter data to Salesforce to assign pricing for any required product.

Procedure

1. Log in to Teamcenter Active Workspace, search for and open the required configuration context, and then navigate to the **Features** tab.
2. In the Page-level toolbar, navigate to **Settings**, click **Import/Export**, and then select **Export to Salesforce**.
3. When the data export begins, you will see the following notification.



4. All Salesforce system administrators receive an email notification when the export is complete. This email contains details of features and groups imported to Salesforce along with the status indicating whether the export was successful or failed.

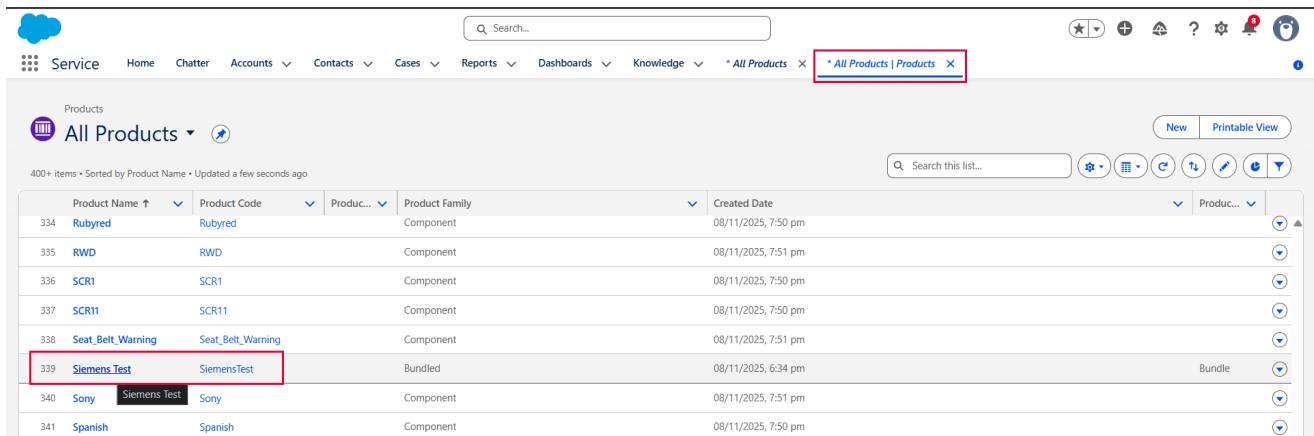


Note

In the event of a data export failure, here are common troubleshooting actions you can take:

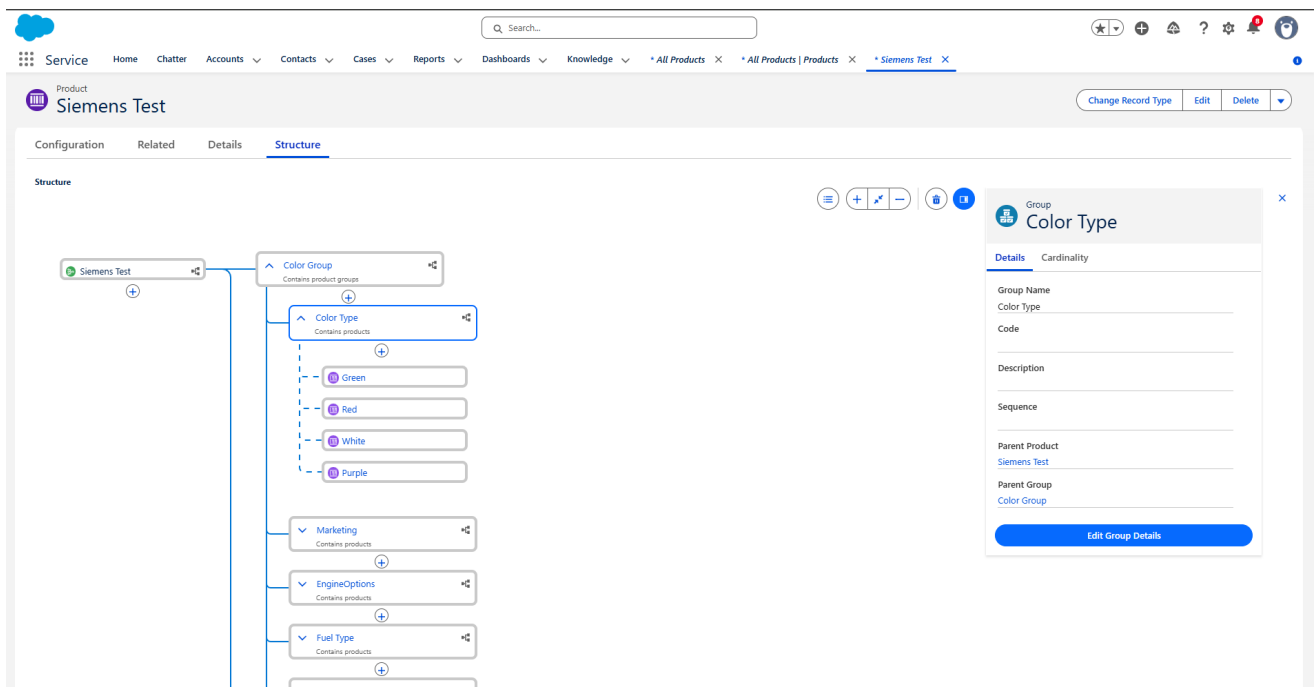
- a. Check your user permissions in both Teamcenter and Salesforce.
- b. Verify the integrity and completeness of the data in Teamcenter.
- c. Contact your IT support or Salesforce administrator for further assistance if the error is unclear or persistent.

5. After the data imports successfully, log in to Salesforce and open the required product to add pricing details.



Product Name	Product Code	Product Family	Created Date
334 Rubyred	Rubyred	Component	08/11/2025, 7:50 pm
335 RWD	RWD	Component	08/11/2025, 7:51 pm
336 SCR1	SCR1	Component	08/11/2025, 7:50 pm
337 SCR11	SCR11	Component	08/11/2025, 7:50 pm
338 Seat_Belt_Warning	Seat_Belt_Warning	Component	08/11/2025, 7:51 pm
339 Siemens_Test	SiemensTest	Bundled	08/11/2025, 6:34 pm
340 Sony	Sony	Component	08/11/2025, 7:51 pm
341 Spanish	Spanish	Component	08/11/2025, 7:50 pm

- For the selected product, navigate to the **Structure** tab.

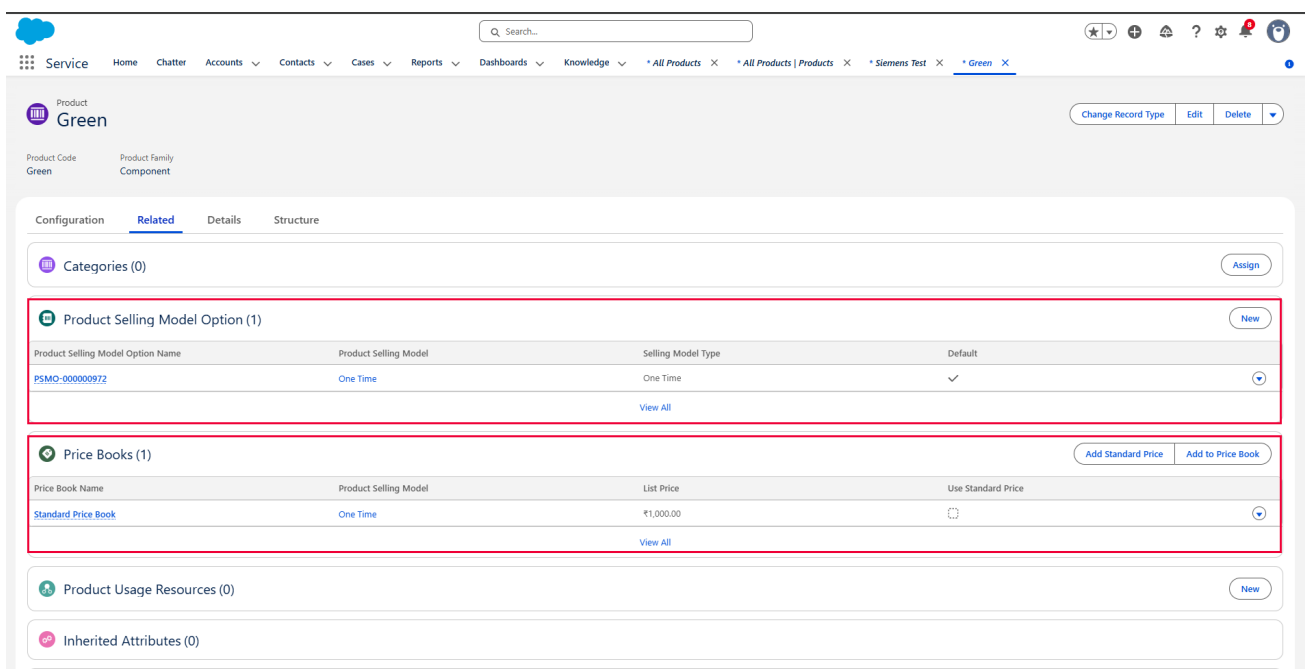


You can see that all the Teamcenter features with **Release Status = TCM Released** are now available in Salesforce.

- To add the selling model and pricing details, click the product, and then navigate to the Related tab. You can also create a catalog, category and assign any required bundled products.

Note

Only Salesforce system administrators can add or update pricing details for the products.



8. After you finish adding pricing, sync the pricing from the pricing setup, and you can create quotes based on it.

Note

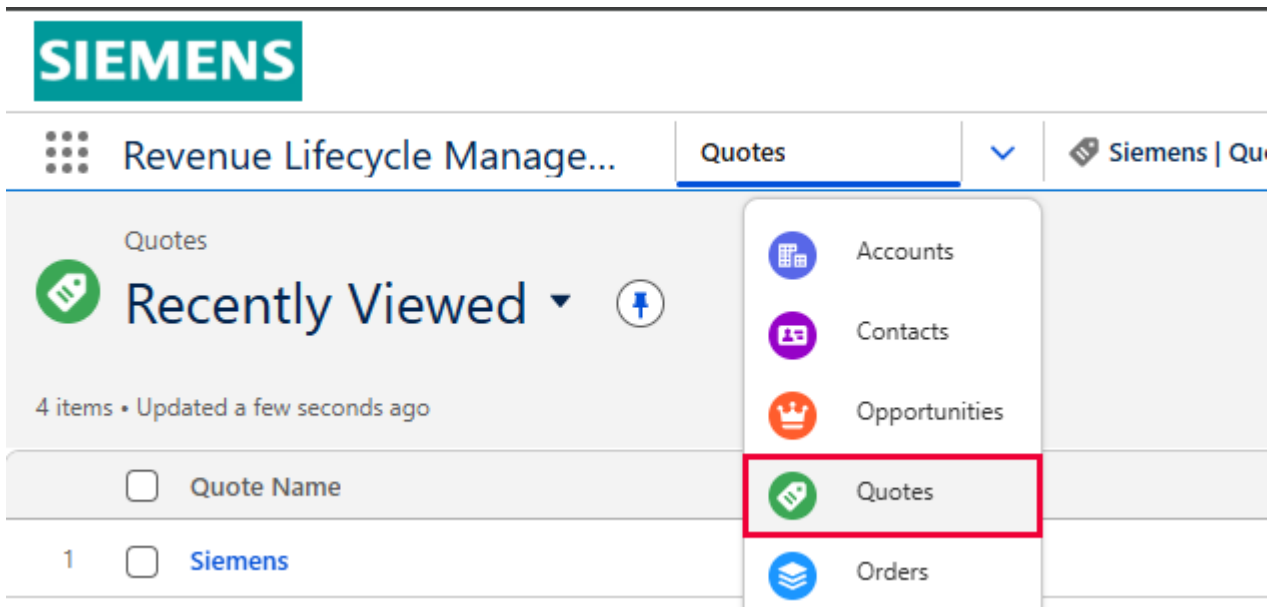
- If you add or update any features or groups in Teamcenter configurations, you need to import the updated configurations to Salesforce.
- If you discontinue any features or groups from Teamcenter configurations, they will be marked as inactive in Salesforce. You cannot add these inactive features or groups to the new Salesforce quotes. However, quotes that are in progress may contain these discontinued features or groups.
- Remember that you can only add products with pricing details to quotes.

Create a new quote

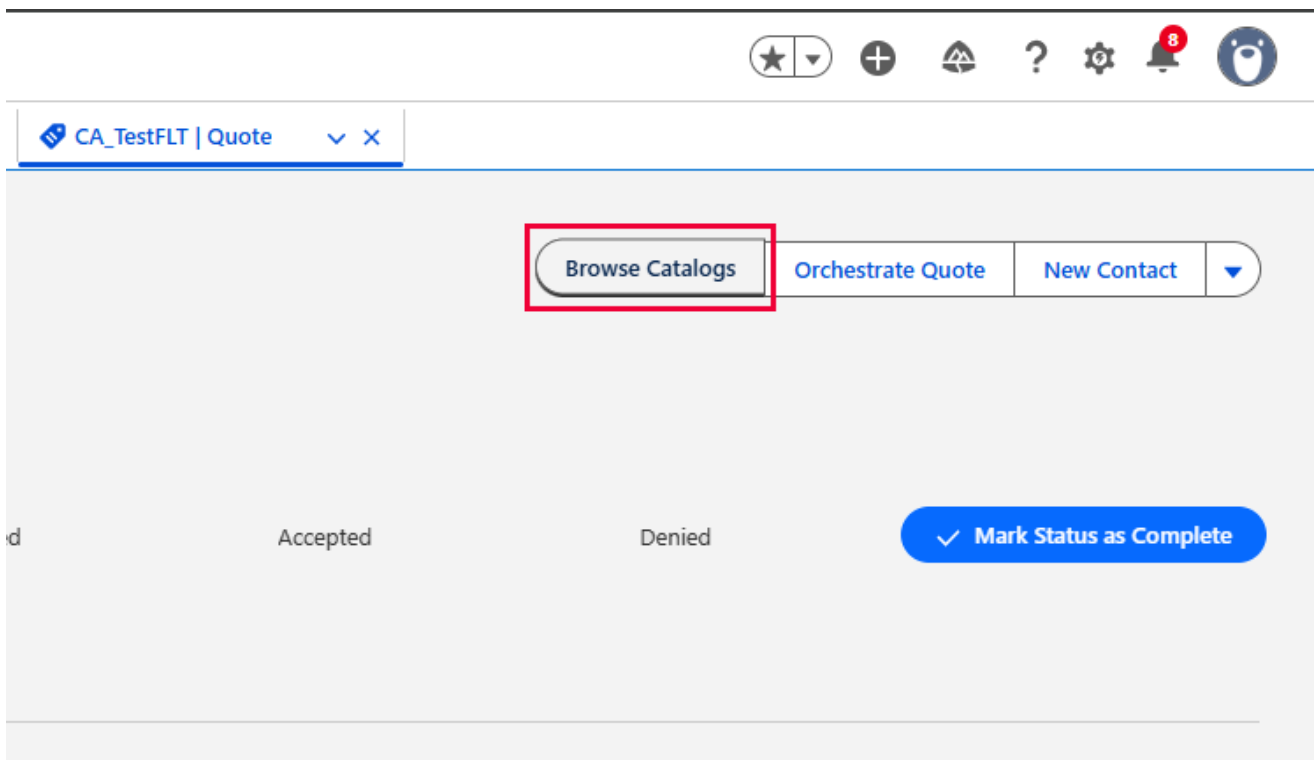
You can create a new quote for products that have pricing details.

Procedure

1. Log in to Salesforce and open the Teamcenter Configure & Quote app.
2. From the Teamcenter Configure & Quote, select **Quotes** from the drop-down menu.



3. Click **New Quote** to create a quote.
The dialog box for **New Quote** opens.
4. Enter the required details, such as **Quote Name**, **Expiration Date**, **Status**, **Description** and so on, and then click Save.
5. To add product to the quote, click **Browse Catalogs**.



6. Select the required **Price Book** from the drop-down menu and click **Save**.

Choose Price Book

Select a price book for this quote. You can add products only from a single price book. Changing a selected price book will delete all existing products from this quote.

Price Book

Standard Price Book

Cancel
Save

7. Select the required catalog from the **Catalogs** list and click **Next**.
8. To configure the required product, click **Configure**. The **Variant Configuration** window opens.

Variant Configuration

Use Guided CRM Load Variants Apply Configuration Previous Required Next Required

Selection Summary Save Save As Settings Full Screen

Custom Configuration Valid, but Incomplete Configuration

Color Group

Filter

▼ Color Type *

☐ Green ☐ Purple, Test

☐ Red ☐ White

▼ EngineOptions *

☐ Coolant 1.2 ☐ Coolant 1.4

☐ Coolant 1.6 ☐ Coolant 1.8

▼ Fuel Type *

☐ Diesel ☐ Petrol

☐ Petrol & CNG

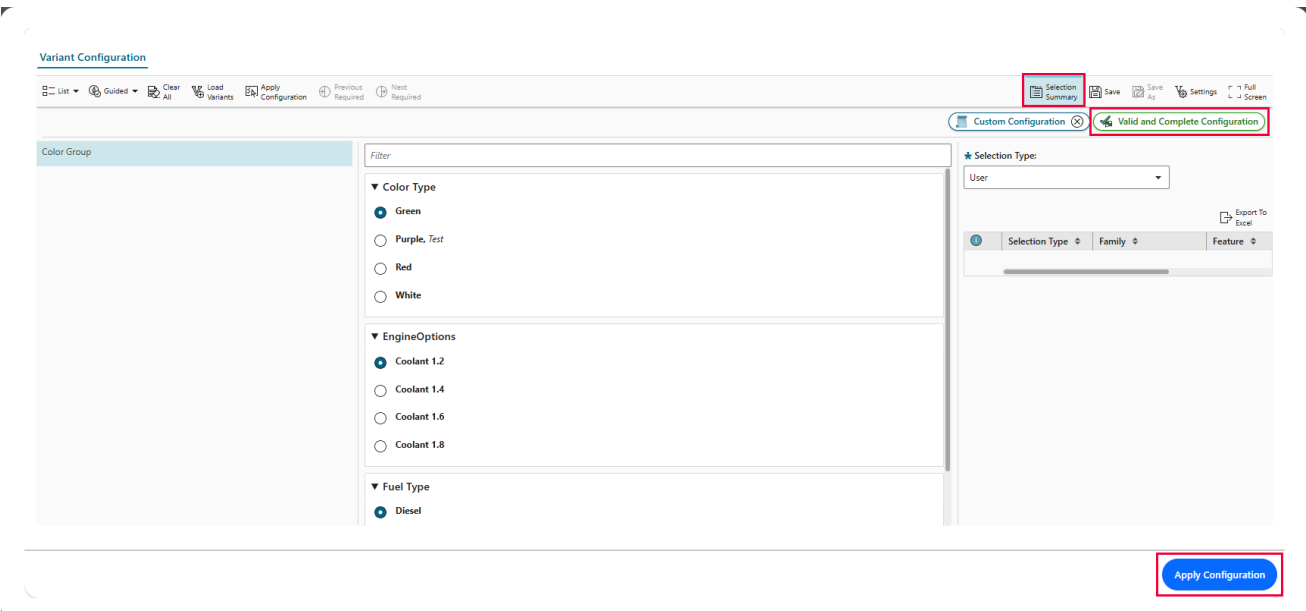
Apply Configuration

9. The window displays all product configurations for the selected catalog within an embedded Teamcenter view.

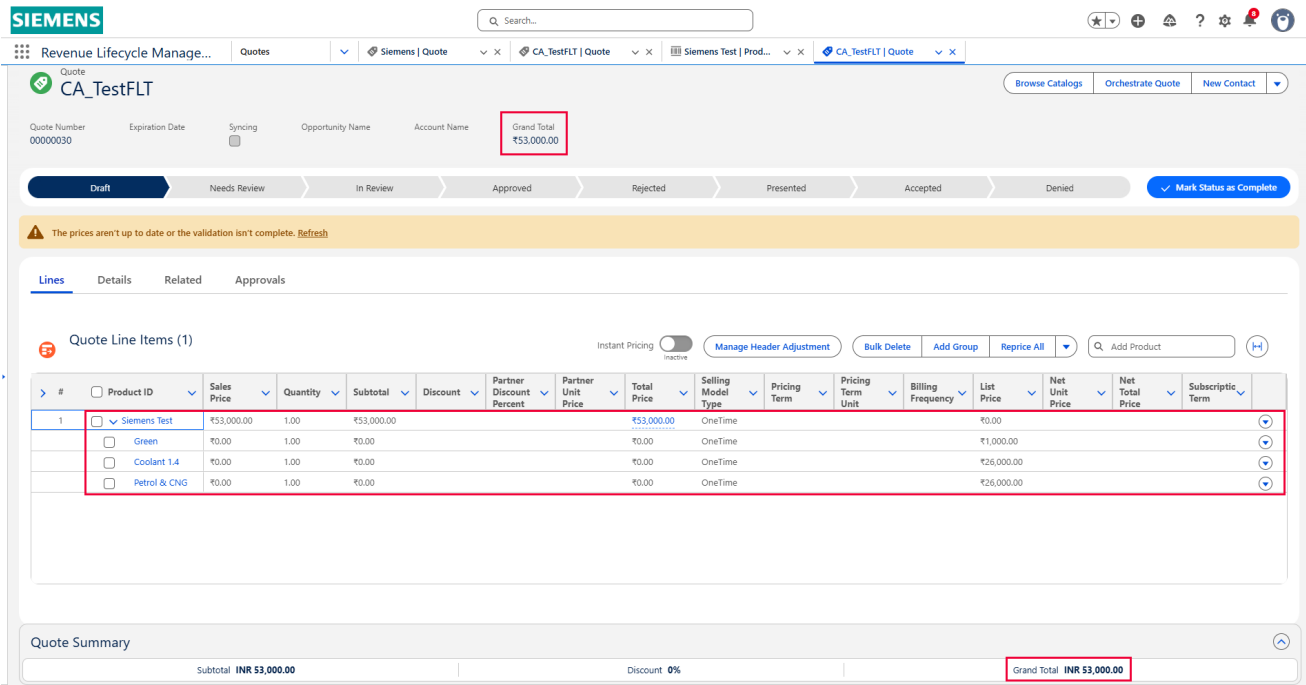
Note

By default, only marketing intent product configurations are available for quote creation. To view different product configurations, use Settings  to change the intent.

10. Select the required configurations to add to the quote. Selected features are automatically validated for completeness based on rules defined in Teamcenter.



- 11. To validate the selected products, click **Selection Summary**.
 - a. If the configuration is incomplete, you can see the message as **Valid, but Incomplete Configuration**.
 - b. If the configuration is complete, you can see the message as **Valid and Complete Configuration**
- 12. In the **Variant Configuration** window, click **Apply Configuration** to add the selected products in the quote.



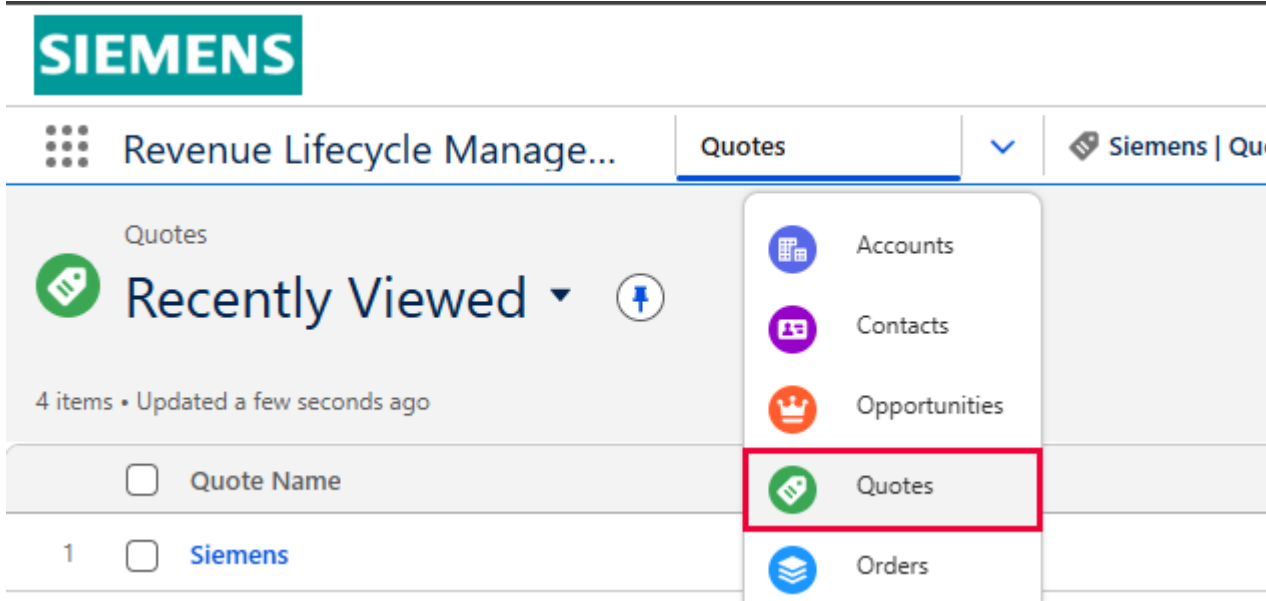
All selected products are added to the quote along with their prices and the **Grand Total**.

13. You can also add multiple products to the quote. To do this, repeat the steps starting from **Browse Catalogs**.

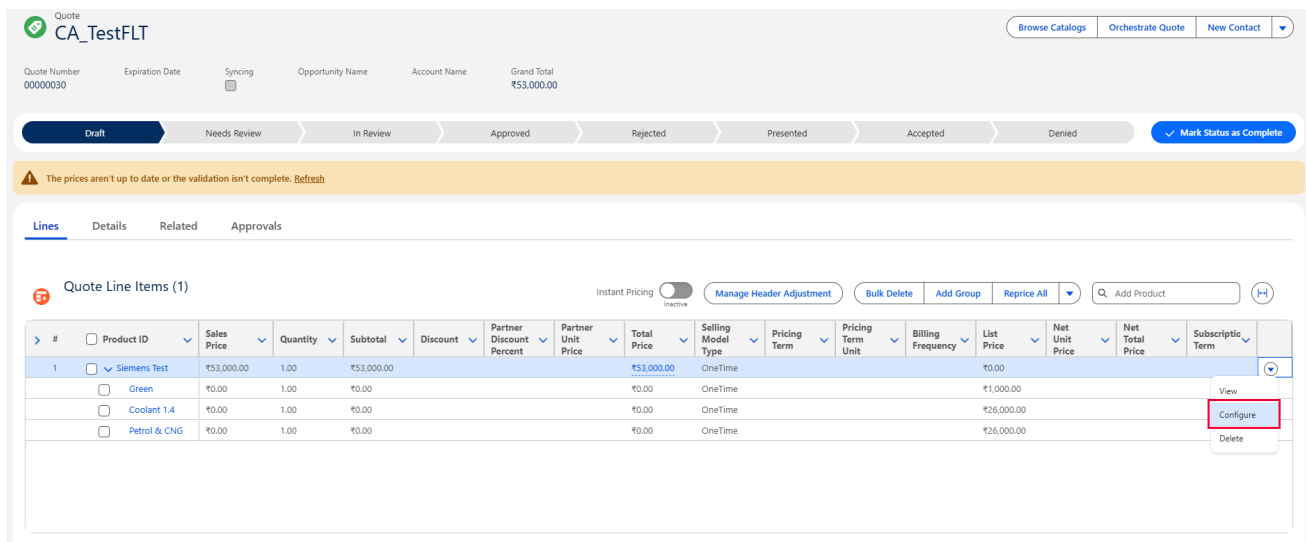
How to update a quote

Procedure

1. Log in to Salesforce and open the Teamcenter Configure & Quote app.
2. From the Teamcenter Configure & Quote app, select **Quotes** from the drop-down menu



3. Open the specific quote you want to update.
4. To add or remove products from the root quote line items, click **Configure** from the drop-down menu.



5. The **Variant Configuration** window displays all product configurations for the selected catalog within an embedded Teamcenter view.
6. Select the required product configurations or clear any that are no longer needed, then click **Apply Configuration** in the **Variant Configuration** window.
The quote updates with these new changes, including updated prices and the **Grand Total**.