










Cheat Sheet: HubSpot Advanced Quoting Rules

Step-by-step walkthroughs for 7 advanced quoting and pricing scenarios you need to solve to run an efficient sales process in HubSpot.

Don't waste time wrestling with complex quoting scenarios. Use this cheatsheet to reference native solutions using [quote•hapily](#) and HubSpot Sales Hub to increase control and consistency across your organization.

-  Create price books for specific teams or regions
-  Apply time-based or seasonal discounts
-  Automatically prevent unauthorized discounting
-  Implement multi-level quote approvals
-  Automatically add one-time fees
-  Automatically calculate (and apply) sales tax
-  Enforce product bundle requirements



“This solves so many different challenges for us internally - specifically rule based quote approvals. It is a great balance of having the core things you need, without being over engineered.”

Brent Werbeck
Director of Revenue Operations at Kisi

Create Price Books For Specific Teams Or Regions

Provide reps with pricing and product access specific to their assigned team or region. This playbook prevents unauthorized quoting while maintaining accurate pricing across different markets and currencies, ensuring clean reporting and streamlined rep workflows.



1

Create a team or region specific price book

- Navigate to price books in [quote+hapily](#)
- Create a new price book for each sales team
- Add descriptive name (e.g. "NA Sales Team Products")
- Add a description explaining usage

The screenshot shows the 'quote+hapily' interface. On the left is a navigation menu with options: Rules, Price Books, Bundles, Collections, Terms Library, Settings, General, Users, and Manage Subscription. The main area is titled 'General Details' and contains the following information:

- Price Book Name:** NA Product Catalog
- Price Book Description:** Products and add-ons for North American market (USD pricing). Standard comm

There is a 'Save' button at the bottom of the form.

2

Associate your existing HubSpot products with price books

- Select the products from your HubSpot library
- Add only products relevant to each specific team

The screenshot shows the 'quote+hapily' interface. On the left is a navigation menu. The main area is titled 'Manage Products & Prices' and contains the following information:

- Price Book Details:** EU Product Catalog. Products and add-ons for European market (EUR pricing). Standard commercial pr
- Manage Products & Prices:** Choose which products will be available in your Price Book. No Products in

There is a '+ Add Products' button. To the right, a table shows the selected products:

NAME	PRICE (USD)
Analytics Package - Premium	\$599.00
Data Sync Basic	\$499.00
Data Sync Enterprise	\$2,499.00
Data Sync Pro	\$999.00
Implementation	\$5,000.00

3

Apply a currency based price override

- For teams who don't use your "standard" pricing in your company currency
- Click "Override All Prices"
- Currency: Specify the currency used by appropriate team for this price book
- Enter Percentage Increase/Decrease: Select the change for this specific team

The screenshot shows the 'quote+hapily' interface. On the left is a navigation menu. The main area is titled 'Manage Products & Prices' and contains the following information:

- Manage Products & Prices:** Choose which products will be available in your Price Book.

A dialog box titled 'Override Multiple Price' is open, showing a warning: 'This will replace any existing overrides.' Below the warning, there are fields for 'Currency' (set to USD) and 'Enter Percent Decrease*' (set to 0). There are 'Override Prices', 'Cancel', and 'Reset Prices' buttons. To the right, a table shows the current prices for the selected products:

NAME	UNIT PRICE (USD)	UNIT PRICE (EUR)
Data Sync Hoodie	\$83.00	
Analytics Package - Premium	\$599.00	€335.00
Data Sync Basic	\$499.00	€292.00
Data Sync Enterprise	\$2,499.00	€2,449.00
Data Sync Pro	\$999.00	€1,059.00
Implementation	\$5,000.00	€3,299.00

4

Create a new quote rule

- Name: Display { region } Price Book for { region } Sales Reps
- Description: Automatically apply discounts for specific pricing tiers in Q4

Rule Name *

Display EU Price Book for EU Sales Reps

Rule Description (Optional)

Automatically select the correct price book on quotes for EU sales reps.

5

Add conditions to the quote rule

- Any of the conditions below
- “Team” IS “{Region} Sales Team”

💡 Alternatively, use a company property to match the region using:

- Any of the conditions below
- “Company” > “Country/Region” > “Contains” > “United States”

Conditions

Any of the groups below

Any of the conditions below

Teams Is Any Of EU Sales Team

+ Add Condition

Conditions

Any of the groups below

Any of the conditions below

Companies Country/Region Contains United States

+ Add Condition

6

Select quote rule outcome

- Set price book (Choose the Price Book to apply to quotes that trigger this rule.)
- Choose “Price Book Name” eg. “EU Product Catalog”

Outcome*

Set Price Book

Choose the Price Book to apply to quotes that trigger this rule.

Price Book*

EU Product Catalog

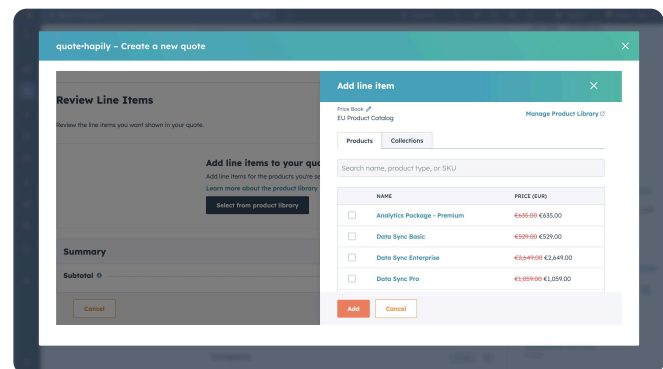
Quote rule priority *

2

7

Verify your price books by creating a test quote

- Create test quote using different companies
- Confirm correct pricing and currencies are visible
- Validate that incorrect products are hidden



💡 Playbook Insights

Multiple teams selling in different regions creates a common challenge in HubSpot. Today you might be creating “hacky” price books for different currencies or teams by duplicating products and changing the price.

Using price books in [quote•hapily](#) allows you to use a single product in HubSpot (and maintain clean reporting) while showing the correct product variation and price for each scenario.

→ Structure your price books to match your sales team organization – whether that’s by region, business unit, or customer segment – while keeping your product catalog unified for accurate reporting.

🔗 Additional Resources

→ [Managing price book membership in HubSpot](#)

→ [Learn more about price books in quote•hapily](#)

Apply Time-Based Or Seasonal Discounts



Set up differentiated pricing for different customer segments (wholesale, retail, tier 1 accounts) without duplicating products. This playbook helps maintain clean reporting while automatically applying the right pricing based on customer type.

1

Create a price book for your promotional pricing

- Create a new price book in [quote.hopily](#)
- Add a descriptive name (e.g., "Q4 Tier 1 Promo Pricing")
- Add a clear description explaining usage

General Details

Price Books allow you to enforce special pricing and define product catalogs that limit the products that can be added to a quote. Use Price Books if you sell different products to different customer segments; maybe distributors vs resellers, or different regions. [Learn more.](#)

Price Book Name *

Q4 Tier 1 Promo Pricing

Price Book Description

Enter Price Book description

Save

2

Add the relevant products to your new price book

- Click "Add Product" and select from your existing HubSpot products to add them to your price book

NAME	PRICE (USD)
<input type="checkbox"/> Data Sync Hoodle	\$80.00
<input type="checkbox"/> Custom Data Integration	\$5,000.00
<input type="checkbox"/> Analytics Package - Premium	\$999.00
<input type="checkbox"/> Data Sync Basic	\$499.00
<input type="checkbox"/> Data Sync Enterprise	\$2,499.00
<input type="checkbox"/> Data Sync Pro	\$999.00
<input type="checkbox"/> Implementation	\$5,000.00

3

Add price overrides to apply discounts

- Click "Override All Prices"
- Override by: "Price Decrease"
- Enter Percentage Decrease: "10%"

💡 You can also select products individually to customize your overrides.

Override Multiple Price

You can override the current price of multiple products below. You can remove or change this override at any time.

Currency: USD

Override By: Percent Decrease

Enter Percent Decrease*: 10

Override Prices Cancel Revert Prices

SKU	UNIT PRICE (USD)
DS-HOOD	\$80.00
DS-ENT	\$5,000.00
DS-ANL-PRE	\$999.00
DS-BASIC	\$499.00
DS-ENT	\$2,499.00

4

Review your overrides

→ You should now see adjusted prices in the price book table based on your overrides.

Price Book Details
Q4 Tier 1 Promo Pricing

General Products & Prices

Manage Products & Prices
Choose which products will be available in your Price Book.

Search name, product type, or SKU Override all prices

<input type="checkbox"/>	NAME	PRODUCT TYPE	SKU	UNIT PRICE (USD)
<input type="checkbox"/>	Data Sync Hoodie	Inventory	DS-HOOD	\$90.00 \$72.00
<input type="checkbox"/>	Custom Data Integration	Service	DS-INT	\$5,000.00 \$4,500.00
<input type="checkbox"/>	Analytics Package - Premium	non_Inventory	DS-ANA-PRE	\$599.00 \$539.10
<input type="checkbox"/>	Data Sync Basic	non_Inventory	DS-BASIC	\$499.00 \$449.10
<input type="checkbox"/>	Data Sync Enterprise	non_Inventory	DS-ENT	\$2,499.00 \$2,249.10
<input type="checkbox"/>	Data Sync Pro	non_Inventory	DS-PRO	\$999.00 \$899.10
<input type="checkbox"/>	Implementation	Service	DS-DMP	\$5,000.00 \$4,500.00

< Prev 1 Next > 25 per page

5

Create a new quote rule

→ Name: Q4 Pricing Promo
→ Description: Automatically apply discounts for specific pricing tiers in Q4.

Rule Name *

Q4 Pricing Promo

Rule Description (Optional)

Automatically apply discounts for specific pricing tiers in Q4

6

Add conditions to the quote rule

→ All of the conditions below
→ “Companies” > “Ideal Customer Profile Tier” > “Is Any Of” > “Tier 1”
→ “Today’s Date” > “Is On or After” > “10/01/2024”
→ “Today’s Date” > “Is On or Before” > “12/31/2024”

Conditions

Any of the groups below

All of the conditions below

Companies Ideal Customer Profile Tier Is Any Of Tier 1

- AND -

Today's Date Is On or After 10/01/2024

- AND -

Today's Date Is On or Before 12/31/2024

+ Add Condition

7

Select a rule outcome

→ Select: Set Price Book
→ Price Book: “Q4 Tier 1 Promo Pricing”
→ Quote rule priority: 1

Outcome*

Set Price Book

Choose the Price Book to apply to quotes that trigger this rule.

Price Book*

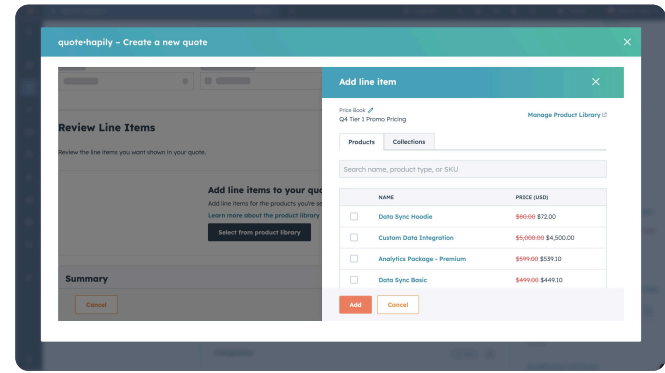
Q4 Tier 1 Promo Pricing

Quote rule priority *

1

Verify your price books by creating a test quote

→ Confirm correct pricing and currencies are visible



Playbook Insights

Time-based pricing strategies are a powerful tool for driving specific business outcomes, but managing them in HubSpot previously meant creating duplicate products or manual price adjustments – both of which create reporting headaches.

Common Use Cases:

- End-of-period pricing promotions
- Seasonal industry-specific discounts (e.g., education customers in August)
- Limited-time product launch pricing
- Customer segment-specific promos

Consider the full lifecycle of deals in your pipeline. Set date ranges to account for quotes should remain valid beyond the promotional period.

Additional Resources

→ [Learn more about discounting in quote•happily](#)

Automatically Prevent Unauthorized Discounting



Implement protective guardrails to prevent unauthorized discounting, out-of-stock sales, and other risky quoting behaviors. This playbook helps maintain pricing consistency and reduce errors across your sales organization through proactive rule enforcement.

1

1. Create a new quote rule

→ Name: Guardrail: Block Discounts > 25%

Rule Name *

Guardrail: Block Discounts > 25%

Rule Description (Optional)

Prevent quotes being published with discounts greater than 25%

2

Add conditions to the quote rule

→ Any of the conditions below
→ “Line Items” > “Discount Percentage” > “Greater Than Or Equal To” > “25”

Conditions

Any of the groups below

Any of the conditions below

Line Items	Discount Percentage	Greater Than or Equal To	25	
------------	---------------------	--------------------------	----	--

+ Add Line Item Condition Is Absent

+ Add Condition

3

Select a rule outcome

→ Select: Block
→ Message: Discounts over 25% aren't allowed

Outcome*

Block

Block sales reps from sending out quotes that trigger this rule.

Block Message *

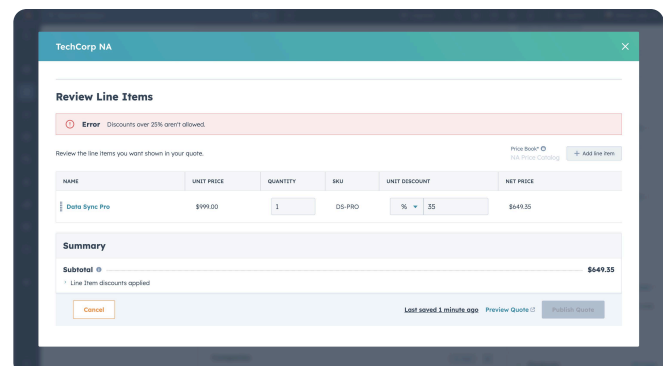
Describe the policy that is blocking this quote.

Discounts over 25% aren't allowed.

4

Verify your quote rules by creating a test quote

→ Create test quote that includes a line item discount of more than 25%
→ Confirm correct pricing and currencies are visible
→ Validate that the quote cannot be published



💡 Playbook Insights

Unconstrained discounting not only impacts margins but creates inconsistency in how your products are valued in the market.

“Today, it’s the wild west and you could do whatever you want in a HubSpot quote...you could go discount anything up to a ridiculous percentage”

Instead of relying on post-quote approvals or manual oversight, automated quote rules prevent unauthorized discounts from being quoted in the first place, saving time and avoiding awkward customer conversations.

Consider creating a tiered approval system (see Playbook #4 below) where smaller discounts can be automatically approved while larger ones trigger your approval workflow.

🔗 Additional Resources

→ [What are quote rules?](#)

Implement Multi-Level Quote Approvals

Create sophisticated approval workflows based on quote characteristics like discount level, deal size, or product mix. This playbook ensures proper oversight while maintaining efficient quote processing through automated approval chains and notifications.



1

Create a new quote rule in quote·happily

→ Name: Guardrails: Require Discount Approval

Rule Name *

Guardrail: Require Discount Approval

Rule Description (Optional)

Require approval on quotes with discounts between 15-25%

2

Add conditions to the quote rule

→ Any of the conditions below
→ “Line Items” > “Discount Percentage” > “Greater Than or Equal To” > “15”
→ “Line Items” > “Discount Percentage” > “Less Than or Equal To” > “25”

Conditions

Any of the groups below

Any of the conditions below

Line Items	Discount Percentage	Greater Than or Equal To	15	🗑️
Line Items	Discount Percentage	Less Than	25	🗑️

+ Add Line Item Condition Is Absent @

+ Add Condition

3

Select a rule outcome

→ Select: Require Approval
→ Message: Quotes with discounts between 15-25% require approval.
→ Checkbox: Check “Add to Approval Queue”
→ Approval Queue: “Sales Approvals”

Require Approval

Sales reps must submit quotes for approval when this rule is triggered.

Message *

Describe the policy that requires approval.

Quotes with discounts between 15-25% require approval.

Add to Approval Queue

Approval Queue*

Sales Approval

Choose the Approval Queue to set for this quote. (optional)

4

Create an automated quote based workflow in HubSpot

- Trigger the workflow when an event occurs
- Has completed: Property value change
- Property name is Quote approval status
- New value: Quote approval status is any of Pending approval

Automatically trigger enrollment when an event occurs (optional)

[Learn more](#) about the different event triggers.

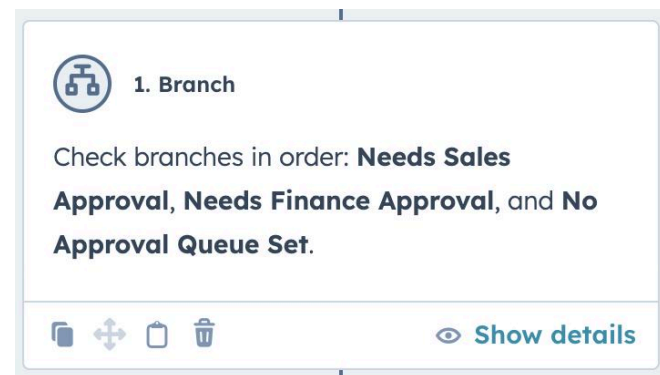
Generate a trigger with AI BETA



5

Create a branch and check branches in order

- Needs Sales Approval: quote•hapily Approval Queue is any of Sales Approval
- Needs Finance Approval: quote•hapily Approval Queue is any of Finance Approval
- No Approval Queue Set: If none of the criteria are met



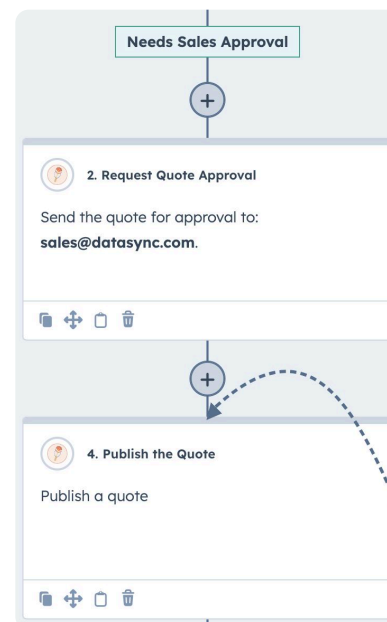
6

Needs Sales Approval Branch

- Action 1: Use the quote•hapily “Request Quote Approval” workflow action to send the quote for approval to your desired sales approver email address.

💡 The “Request Quote Approval” action checks all approvals have been accepted before releasing the quote to the next step in the workflow.

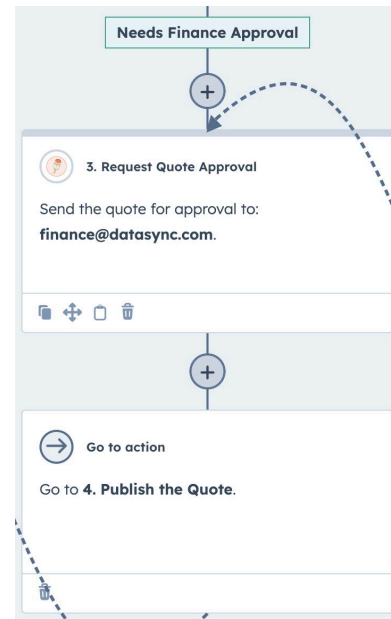
- Action 2: Use the quote•hapily “Publish the Quote” action to publish the quote for prospects.



Needs Finance Approval Branch

→ Action 1: Use the quote•hapiy “Request Quote Approval” workflow action to send the quote for approval to your desired finance approver email address.

→ Action 2: Use the “Go To Action” workflow action to route the workflow to the quote•hapiy “Publish the Quote” action in the first branch.



No Approval Queue Set

→ Action 1: Use the “Go To Action” workflow action to route the workflow to the quote•hapiy “Publish the Quote” action in the first branch.



💡 Playbook Insights

The approval process in quote•hapiy can automatically route quotes based on specific triggers like discount levels or deal size. The system has built in checks for tracking multiple pending approvals and only publishes quotes once all required approvers have signed off, ensuring proper oversight without creating unnecessary delays.

Start with your most common approval scenarios and gradually add complexity as your team adapts to the new process.

🔗 Additional Resources

→ [What are quote rules?](#)

→ [Learn about advanced approvals in quote•hapiy](#)

Automatically Add One-Time Fees To Quotes



Automatically add one-time fees to quotes based on specific triggers like deal value, product mix, or customer attributes. Perfect for adding support fees, shipping charges, processing fees, or any other conditional charges without manual calculation.

1

Create a new quote rule

→ Name: Add One-Time Percentage Support Fee

Rule Name *

Add One-Time 10% Percent Fee

Rule Description (Optional)

Include a handling fee for inventory products.

2

Add conditions to the quote rule

→ “Any of the conditions below”
→ “Line Items” > “Product Type” > “Is Any Of” > “Inventory”

Conditions

Any of the groups below

Any of the conditions below

Line Items	Product Type	Is Any Of	Inventory	
------------	--------------	-----------	-----------	--

+ Add Line Item Condition Is Absent ⓘ

+ Add Condition

3

Select a rule outcome

→ Select: Add One-time fee(s)
→ One-Time Fee: 10%

Outcome*

Add One-time Fee(s)

Add One-time Fees to a quote.

One-Time Fee* ⓘ

10



%

10

+ Add another fees

4

Verify your quote rules by creating a test quote

→ Create test quote that includes a line item with the type “Inventory” line item
→ Confirm a one-time fee with the correct percentage has been added
→ Verify the total amount of the quote is correct

NAME	UNIT PRICE	QUANTITY	SKU	UNIT DISCOUNT	NET PRICE
Data Sync Module	\$80.00	1	DS-HOOD	% 0	\$80.00

Summary

Subtotal ⓘ \$80.00

One-time fee* 10 % 10 \$8.00 ⓘ

+ Add discount, fee, or tax +

Total contract value ⓘ \$88.00

Cancel Last saved 1 minute ago Preview Quote Publish Quote

💡 Playbook Insights

HubSpot quoting allows for basic line item pricing but businesses often need more sophisticated fee calculations that respond dynamically to what's being quoted.

Whether it's shipping costs for physical products, processing fees for large deals, or handling charges for specific product combinations, manual calculation of these fees is both time-consuming and error-prone.

Quote rules turn this manual process into an automated one. By automatically calculating and applying fees based on quote conditions, you can eliminate the need for sales reps to remember when and how to add various charges.

🔗 Additional Resources

→ [Explore how the quote builder works in HubSpot](#)

Automatically Calculate (And Apply) Sales Tax



Automatically calculate and apply the correct tax rates to quotes based on product type and customer location, ensuring accurate tax collection without leaving HubSpot.

1

Create a new quote rule

→ Name: Add VAT for UK Customers

Rule Name *

Add VAT for UK Customers

Rule Description (Optional)

Automatically apply VAT to quotes provided to UK based companies.

2

Add conditions to the quote rule

→ “Any of the conditions below”
→ “Companies” > “Country/Region” > “IS” > “United Kingdom”

Conditions

Any of the groups below

Any of the conditions below

Companies	Country/Region	Is	United Kingdom	
-----------	----------------	----	----------------	--

+ Add Condition

3

Select a rule outcome

→ Select: One-time Tax(es)
→ One-Time Tax: “VAT” → Percentage: “20%”

Outcome*

Add One-time Tax(es)

Add One-time Taxes to a quote.

One-Time Tax* ⓘ

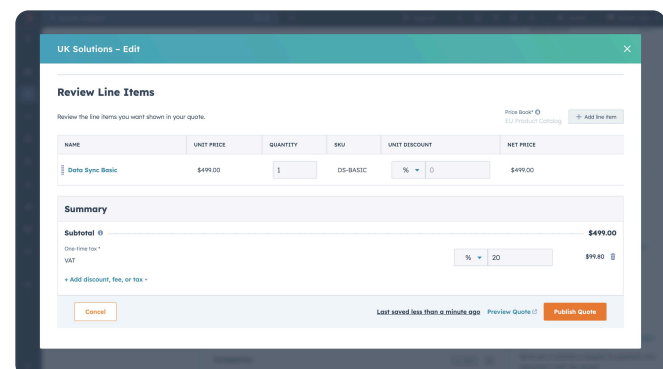
VAT

% 20

4

Verify your quote rules by creating a test quote

→ Create test quote for a company with a “Country/Region” of “United Kingdom”
→ Confirm a one-time tax for 20% has been added
→ Verify the total amount of the quote is correct



💡 Playbook Insights

Tax calculation requires sophisticated handling of multiple jurisdictions, different product types, and varying customer scenarios.

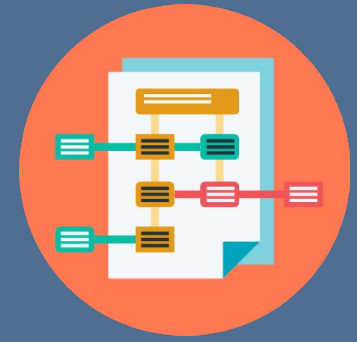
Starting with automation for your most common scenarios can significantly reduce manual work and eliminate costly errors in your quoting process.

Keeping tax calculations in HubSpot helps maintain clean reporting while ensuring consistent tax application across quotes.

🔗 Additional Resources

→ [How does quote•happily automatically calculate US sales tax?](#)

Enforce Product Bundling Requirements



Ensure compliance with product bundling requirements by creating rules that enforce the inclusion of necessary add-on products. Perfect for companies that need to ensure services, support, or additional products are always quoted with specific offerings, preventing incomplete or non-compliant quotes.

1

Create a new “Notify” quote rule

- Name: Guardrail: Require Implementation for Enterprise Plans
- Conditions: “Any of the conditions below”

Rule Name *

Require Implementation for Enterprise Plans

Rule Description (Optional)

Notify reps that an implementation line item is required when adding an enterprise

2

Add conditions to the quote rule

- Any of the conditions below
- “Line Items” > “Name” > “Contains” > “Enterprise”

Conditions

Any of the groups below

Any of the conditions below

Line Items	Name	Contains	Enterprise	🗑️
------------	------	----------	------------	----

+ Add Line Item Condition Is Absent ⓘ

+ Add Condition

3

Select a rule outcome

- Outcome Type: “Notify”
- Notify Message: “You must include implementation when selling an enterprise plan.”

Outcome*

Notify

Display a message to sales reps when this rule is triggered.

Notify Message *

You must include implementation when selling an enterprise plan.

4

Create a new “Block” quote rule

- Name: Guardrail: Block Enterprise Quotes without Implementation
- Conditions: “Any of the conditions below”

Rule Name *

Guardrail: Block Enterprise Quotes without Implementation

Rule Description (Optional)

Prevent quotes with enterprise line-items being published without implementation

5

Add conditions to the quote rule

- Any of the conditions below
- “Line Items” > “Name” > “Contains” > “Enterprise”
- “Line Items” > “Name” > “Is None Of” > “Implementation”

Conditions

Any of the groups below

All of the conditions below

Line Items Name Contains Enterprise

Line Items Name Is None of Implementation

Enter new value

+ Add Line Item Condition Is Absent

+ Add Condition

6

Select a rule outcome

- Outcome: Block
- Notify Message: “Before you can publish a quote you must add implementation for enterprise plans”

Outcome*

Block

Block sales reps from sending out quotes that trigger this rule.

Block Message*

Describe the policy that is blocking this quote.

Before you can publish a quote you must add implementation for enterprise plan:

7

Verify your quote rules by creating a test quote

- Create test quote that includes an “Enterprise” line item
- Confirm correct pricing and currencies are visible
- Validate that the quote cannot be published

quote-hapily - Create a new quote

Review Line Items

Error Before you can publish a quote you must add implementation for enterprise plans

Notice You must include implementation when selling an enterprise plan.

Review the line items you want shown in your quote.

NAME	UNIT PRICE	QUANTITY	SKU	UNIT DISCOUNT	NET PRICE
Data Sync Enterprise	\$2,499.00	1	DS-ENT	% 0	\$2,499.00

Summary

Subtotal **\$2,499.00**

Cancel Last saved less than a minute ago [Preview Quote](#) [Publish Quote](#)

💡 Playbook Insights

When selling complex products, ensuring the right combination of products, services, and support is crucial for customer success. Without automated enforcement, sales teams often forget critical components or struggle to maintain consistency in their quoting process.

By using rules to enforce product combinations, you can eliminate guesswork and ensure every quote includes all necessary components, while maintaining the flexibility to handle exceptions through the approval process.

Build your bundle requirements based on your most successful customer implementations to ensure new customers get the support they need to be successful.

🔗 Additional Resources

→ [What are quote rules?](#)

→ [Learn more about bundling in quote•happily](#)

Thank You For Reading



Want to see how quote•hapily delivers HubSpot native CPQ that brings complex business rules to HubSpot Quotes making them smarter, faster, and completely hassle-free.

[TRY IT FREE](#)

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