PandaDoc®

PROTECT YOUR MARGINS IN 2026

HOW TO DISCOUNT SMARTER WITHOUT SLOWING YOUR SALES TEAM DOWN

Discounting is a necessary part of selling, but without guardrails, it becomes one of the fastest ways to erode your margins.

Revenue leaders know the tension. Reps need flexibility to close. But when there's no structure around pricing approvals, it opens the door to unnecessary discounts, inconsistent pricing, and margin losses that only show up after the deal's closed.

That's why fast-moving revenue teams are building smarter quoting systems. With the right CPQ tools in place, you can keep deals moving while maintaining control.

This playbook walks you through how to do exactly that using PandaDoc CPQ alongside your CRM. In this playbook, we'll be using Salesforce as an example.

Who this playbook is for

We compiled this guide for revenue teams that:

📄 Process tens of quotes monthly with variable pricing.

% Struggle with discount consistency across reps.

⤳ Need approval workflows that don't slow deals down.

🛡 Want better margin protection without micromanaging reps.

This playbook will teach you how to:

✅ Set up templates mapped to Salesforce for consistent pricing and quoting.

✅ Use Advanced Pricing Tables to apply structured discount logic at the product level.

✅ Control what reps can see and select with Conditional Logic tied to deal context.

✅ Trigger automatic approval routing when pricing thresholds are exceeded.

✅ Lock down editable fields and permissions to prevent unauthorized changes.

✅ Maintain visibility into discount activity with synced quote data and approval history.

And the best part?

Once it's configured, it runs in the background — no manual policing required.
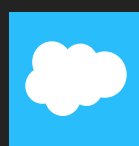
Let's get started.

Your toolkit

Here's what you'll need to implement discounting guardrails:

Essential tools:

Salesforce CRM

your source of truth for deal data, including prospect information

PandaDoc CPQ for Salesforce

for dynamic pricing, templates, approvals, and analytics

Additionally, there are two specific options to connect these two platforms for the configure, price, quote (CPQ) process.

PandaDoc + Salesforce integration

- Native sync
- No middleware

PandaDoc CPQ add-on

- Guided discounting
- Conditional pricing
- Approval routing

What this tech stack offers

Simply put, this tech stack allows reps to use PandaDoc's quoting and discounting tools directly inside Salesforce. That means fewer clicks, no switching tabs, and a quoting process that runs where your team already works.

This native integration auto-fills quotes with opportunity data, while Advanced Pricing Tables and Conditional Logic guide reps toward compliant, deal-ready pricing. And thanks to two-way sync, quote activity — including discounts, approvals, and send status — flows back into Salesforce for full pipeline visibility.

All this provides your sales reps:

A native Salesforce experience

There's no separate platform to learn.

Visual quote building

Reps see exactly what prospects will see.

Instant approval routing

There's no email chains or manual handoffs.

Now, let's break down the build.

QUOTE

PHASE ONE

BUILD YOUR BACKEND GUARDRAILS
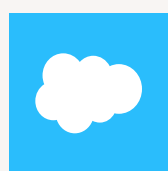
→ **Set up guided discounting**

Once your tech stack is ready, it's time to set up guided discounting in PandaDoc. The full configuration typically takes 60 to 90 minutes — and once it's live, it can help your sales team protect margins, speed up approvals, and deliver accurate quotes to every customer.

Configure your Salesforce-mapped templates

Start by creating PandaDoc templates that map to your Salesforce Opportunity and Product fields. These templates will be used by reps directly from their Opportunity records.

Your templates should include:

- Predefined pricing for each SKU

- Discount fields mapped to Salesforce

- Dynamic variables for product name, unit price, quantity, and total

Use PandaDoc's variable system to ensure each quote reflects real-time pricing pulled from Salesforce. This prevents reps from having to manually enter pricing or discount fields.

Add Advanced Pricing Tables for structured discounts

Advanced Pricing Tables allow you to control how discounts behave at the product level.

Examples of what you can configure in these tables:

- Tiered discount logic (e.g., "Max 10% discount under $5,000")

- Product-specific rules (e.g., "No discounting allowed on Implementation Fees")

- Auto-calculated totals that update based on quantity or pricing inputs

The rules you set here ensure discounts follow your pricing strategy — not guesswork.

When type is

Price

Tier 1

IF   quantity is from   1   to   10

THEN   price per item is   230   USD

Rule 1

IF   quantity is from   11   to   20

THEN   price per item is   220

Use Conditional Logic to guide rep selections

Next, apply Conditional Logic to the templates so reps only see valid options based on the deal context.

You can trigger logic based on:

- Salesforce Opportunity fields (e.g., deal size, stage, region)
- Products selected
- Margin thresholds

This keeps reps within boundaries and reduces the chance of non-compliant quotes.

When
Dropdown1 value is selected

If
Value is equal to

Product

Then
Show these fields

Add items

Set up approval routing based on discount thresholds

PandaDoc's Approval Routing lets you automatically flag quotes that exceed specific criteria — like high discount percentages or low-margin deals — and send them to the appropriate stakeholder for review before the quote can be sent.

You can define approval conditions based on:

- Total document value

- Any individual line item discount

- Custom pricing fields tied to your Salesforce data

Example: "If any line item has a discount greater than 15%, route to the Sales Director for approval."

Once a threshold like this is met, the workflow pauses until the designated approver signs off, keeping oversight in place without slowing down standard deals.

No guesswork. Just clean, enforceable approvals built right into the workflow.
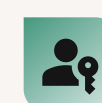
Lock down editable fields and permissions

Once your pricing rules and approval workflows are in place, the final guardrail is controlling who can edit what — and when.

In PandaDoc, you can:

Lock sections of your pricing tables to ensure only pre-approved options can be selected.

Assign roles and permissions to prevent unauthorized changes post-approval or once a document is sent.

Restrict editing access to key pricing fields (like unit price or discount) so reps can't bypass logic by manually adjusting line items.

Ensure that only Sales Managers or Finance can unlock and edit discount fields beyond pre-set thresholds, while reps still must adhere to the approved ranges.

This step closes the loop by preventing tampering and maintaining compliance after logic and routing have been configured. It's the final layer of control that ensures your rules are always enforced.

Start with your most frequent deal types and common objection patterns. I always recommend beginning with 3–5 core products and basic discount tiers. Focus on the 80/20 rule — configure the scenarios that cover 80% of your deals first. You can always layer in complexity once the foundation is working smoothly.
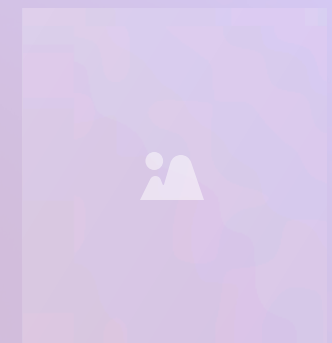
SERVICES QUOTE

INVOICE

$

$

PHASE TWO

THE REP EXPERIENCE

→ **Create quotes**

Now that your discounting guardrails are set up, let's walk through how reps create quotes inside Salesforce. With all the guardrails in place, quoting — even with variable discounts — should only take a few minutes from start to send.

Here's what it looks like.

Reps open an Opportunity in Salesforce

The PandaDoc card appears directly within the Opportunity record. Reps click "Start Quote" to launch the quoting workflow.

Opportunity
VELOVIBE STORE

PandaDoc CPQ   **PandaDoc Documents**

Workflow runs

🔍 Search   **Start workflow**

Name	Status		Created ↓
Pedal Power Proposal	Document	2 of 4	Aug 27, 2025

Discount options populate automatically

Based on the products selected and deal details, the quote template auto-populates with:

- Pre-set pricing
- Available discount fields (if allowed)
- Visual cues for restricted items (e.g., no discount allowed)

Reps don't have to guess what's okay, it's already built into the experience.

Quote

	Price	Quantity	Discount
Base Model	$1,220.00	1	10%
Advanced Model	$3,270.00	1	5%
Custom Racing Model	$1,220.00	1	0%

Discount $285.5

Reps complete the quote and submit

Before finishing a quote, reps can:

- Adjust quantities.
- Select from approved discount tiers.
- Add notes if required by the approval logic.

Then, if everything falls within preset guardrails, the quote can be sent immediately.

Automatic approvals trigger (when needed)

If a rep applies a discount outside the allowed range, PandaDoc will automatically route the quote for approval, no manual tagging or emails required.

Approvers receive a notification, review the quote, and can approve or reject in just a few clicks.

This keeps approvals moving without any unnecessary delay.

The quote is sent — and synced

Once approved, the rep sends the quote to the customer via email or link.

All quote data, including discounts and approvals, syncs back to the Opportunity record in Salesforce for full visibility.

What sales leaders gain

Reduced margin erosion

Built-in rules prevent over-discounting at the source.

Faster approvals

Standard deals fly through the pipeline, no manual reviews needed.

Greater visibility and control

Discount thresholds, quote behavior, and approval triggers are all tracked with no more blind spots.

Automated routing that keeps deals moving

Non-standard quotes escalate instantly to the right approver, so oversight doesn't become a bottleneck.

The biggest win isn't just margin protection, it's rep confidence. When reps know exactly what they can offer without approval, they spend less time second-guessing and more time closing. Track your quote-to-send times before and after implementation to see this impact.

Ready to bring structure to your discounting workflow?

Guided discounting doesn't just protect your margins,
it gives your entire sales org a better quoting experience.

And with PandaDoc CPQ for Salesforce, it's all doable.

✓ WITHOUT CODE

✓ NO HEAVY LIFT

✓ MINIMAL ADMINISTRATIVE OVERSIGHT

See how PandaDoc CPQ for Salesforce can help your team quote faster, protect margins, and automate approvals where it counts.

SCHEDULE A DEMO →

PandaDoc