

Product Case Study

The Transformer: Reinventing How Manufacturers’ Reps Build Quotes

How Rep Order Management’s newest capability eliminates manual data entry, cuts quote build times, and transforms the way rep firms work.

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The Challenge

Manual Data Entry Was Costing Rep Firms Hours Per Quote

For independent manufacturers’ representatives, quoting is the engine of the business. Every proposal represents a window to win or lose a job. Yet for years, the mechanics of building those proposals have remained unnecessarily burdensome.

When a rep produces an equipment configuration using the manufacturer’s selection or pricing software, the rep’s team has to manually transcribe product details. On a complex job, this process could consume several hours. And every manual keystroke is an opportunity for error.

Dynamic pricing compounds the problem further. When manufacturers update pricing frequently, reps face the additional burden of running two or three verification passes per quote to confirm accuracy before it goes out the door. The industry needed a better way.

Introducing The ROM Transformer
Stop Building Quotes by Hand

The Transformer is a capability within the Rep Order Management platform that eliminates manual data entry at its source. The Transformer ingests the direct output from manufacturer selection tools and converts it instantly into ROM’s quoting engine, fully priced, fully structured, and ready for review.

The Transformer Operates Across Three Core Use Cases:

Instant build conversion: Manufacturer outputs are imported directly into ROM, no rekeying, no transcription errors, no wasted time.

Full catalog transformation: Entire manufacturer product catalogs can be converted and structured within the ROM quoting engine, making future quoting faster from the first line.

Legacy quote templating: Existing quotes, even those built before ROM, can be transformed into reusable templates, allowing firms to build on their history and standardize their output from day one.

The result: quote builds that previously required hours of careful data entry and repeated verification are now completed in minutes.



From the Field: WREN Industries

WREN Industries was among the first rep firms to deploy The Transformer in production. Their experience illustrates the scope of the impact.

Before The Transformer, the WREN Industries team built every quote by manually creating a new product entry for each piece of equipment, a process that, on a complex multi-line job, could consume most of a working day.

“The first time we used The Transformer, I was genuinely blown away. A quote that had 30 lines, something that would have taken two to three hours to build, was loaded and priced in under five minutes. It was a completely different way of working.” — Christopher Lomax, Owner, WREN Industries

The accuracy gains proved equally meaningful. Dynamic pricing had long made it difficult for WREN Industries to build reliable budget templates, with pricing fluctuating across manufacturer tools, each quote required multiple verification rounds to ensure every line item was current and correct.

With The Transformer, every line item is priced automatically at the point of import. WREN Industries reduced its per-quote verification passes from two or three down to a single review before applying global multipliers and margins.

The Impact

“The Transformer took a three-hour quote down to five minutes. It’s freed our team from the desk and put us back in front of customers, where we belong.” — Christopher Lomax, Owner, WREN Industries

The operational shift extended beyond individual quotes. With the burden of manual entry and verification removed, the **WREN Industries** team can now move from a manufacturer’s proposal to a customer-ready quote faster than was previously imaginable, changing not just how they work, but how many opportunities they can pursue.

Key Advantages at a Glance

- ✓ Manufacturer outputs flow directly into ROM with no transcription.
- ✓ Substantially fewer errors, pricing is applied at import, reducing verification rounds.
- ✓ Streamlined onboarding, legacy quotes become templates, so new reps and new lines hit the ground running.



14 Manufacturers Integrated, and Growing

At launch, The Transformer supports integrations with 14 leading HVAC, hydronics, and mechanical equipment manufacturers. ROM is adding new manufacturer integrations weekly. The current library is expected to double in the near term as ROM deepens its manufacturer partnerships across the HVAC, hydronics, air distribution, and electrical equipment markets.

Centrotherm	Daikin	Innovent
KCC	Multistack	Power Flame
Rheem	Samsung	Schebler
Superior	Valent	Weishaupt
Wilo		

Ready to Win More Bids?

See why manufacturer’s rep firms across the U.S. and Canada choose ROM to manage their entire sales operation.

Request A Demo →

