

# Oracle® Pricing

User's Guide

Release 11i

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Part No. A88825-01

**ORACLE®**

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Oracle Pricing User's Guide, Release 11i

Part No. A88825-01

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Contributing Authors: Rajeshwari Chellam, Amy Cui, Swati Deshmukh, Sripriya Gopal, Vivek Gulati, Nitin Hase, Leslie Hershey, Jayarama Holla, Jeff Lee, Tony Maxey, Sameer Phatarpekar, Alison Schofield, Renganathan Sreenivasan, Kannan Tarakad, Ravi Tata, Boon Tea, T. Geresh, Maria Viglionese Matheny, Linda Xu

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# Send Us Your Comments

**Oracle Pricing User's Guide, Release 11i**

**Part No. A88825-01**

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this publication. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most about this manual?

If you find any errors or have any other suggestions for improvement, please indicate the chapter, section, and page number (if available). You can send comments to us in the following ways:

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Oracle Pricing Documentation  
500 Oracle Parkway, 30p6  
Redwood Shores, CA 94065  
USA

If you would like a reply, please give your name, address, and telephone number below.

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If you have problems with the software, please contact your local Oracle Support Services.



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# Preface

## Audience for This Guide

Welcome to Release 11*i* of the *Oracle® Pricing Users Guide*.

This users guide is intended for users who will either configure or use Oracle Pricing in day to day operations. This guide also describes *how* to perform common tasks using Oracle Pricing.

## Structure

This manual contains nine chapters and six appendices:

- |           |  |
|-----------|--|
| Chapter 1 | Introduces Oracle Pricing concepts and provides an overview of Oracle Pricing functionality. |
| Chapter 2 | Explains Oracle Pricing setup and configuration.   |
| Chapter 3 | Introduces Oracle Pricing Qualifiers and associated qualifier functionality.                 |
| Chapter 4 | Introduces Oracle Pricing Modifiers and associated modifier functionality.                   |
| Chapter 5 | Introduces Oracle Pricing Formulas and associated formula functionality.                     |
| Chapter 6 | Explains Oracle Price Lists and associated price list usage and functionality                |
| Chapter 7 | Introduces Oracle Pricing Agreements and associated agreement functionality                  |

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Chapter 8	Introduces Oracle Pricing default data sourcing rules and associated functionality
Chapter 9	Listing and definition of Oracle Pricing Reports
Appendix A	Provides a listing of Oracle Qualifier seed data
Appendix B	Provides a listing of Oracle Pricing Attribute seed data
Appendix C	Provides a listing of Oracle Pricing Lookups
Appendix D	Provides Oracle Pricing Modifier usage scenarios
Appendix E	Provides Oracle Pricing Formulas usage scenarios
Appendix F	Provides a listing of Oracle Pricing Navigation Paths

## Related User Guides

Oracle Pricing shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other documents when you set up and use Oracle Pricing.

You can read the guides on-line by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at <http://oraclestore.oracle.com>.

## User Guides Related to All Products

### Oracle Applications User Guide

This guide explains how to navigate the system, enter data, and query information, and introduces other basic features of the GUI available with this release of Oracle Applications. You can also access this document on-line by choosing *Getting Started and Using Oracle Applications* from the Oracle Applications help system.

### Oracle Alert User Guide

Use this guide to define periodic and event alerts that monitor the status of your Oracle Applications data.

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## **Oracle Applications Implementation Wizard User Guide**

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

## **Oracle Applications Developer's Guide**

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards*. It also provides information to help you build your custom Oracle Developer forms so that they integrate with Oracle Applications.

## **Oracle Applications User Interface Standards**

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

# **User Guides Related to This Product**

## **Oracle Applications Demonstration User's Guide**

This guide documents the functional storyline and product flows for Vision Enterprises, a fictional manufacturer of personal computers products and services. As well as including product overviews, the book contains detailed discussions and examples across each of the major product flows. Tables, illustrations, and charts summarize key flows and data elements.

## **Oracle Business Intelligence System Implementation Guide**

This guide provides information about implementing Oracle Business Intelligence (BIS) in your environment.

## **BIS 11i User Guide On-line Help**

This guide is provided as on-line help only from the BIS application and includes information about intelligence reports, Discoverer workbooks, and the Performance Management Framework.

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## Oracle General Ledger Users Guide

This guide explains how to plan and define your chart of accounts, accounting period types and accounting calendar, functional currency, and set of books. It also describes how to define journal entry sources and categories so you can create journal entries for your general ledger.

If you use multiple currencies, use this manual when you define additional rate types, and enter daily rates. This manual also includes complete information on implementing Budgetary Control.

## Oracle HRMS Documentation Set

This documentation set includes the following volumes:

- *Using Oracle HRMS - The Fundamentals*, which explains how to set up organizations and site locations.
- *Managing People Using Oracle HRMS*, which explains how to enter employees and track employee data.
- *Running Your Payroll Using Oracle HRMS*, which explains how to set up payroll, do withholding, run statutory reports, and pay employees.
- *Managing Compensation and Benefits Using Oracle HRMS*, which explains how to set up Total Compensation, including 401(k), health, and insurance plans.
- *Customizing, Reporting, and System Administration in Oracle HRMS*, which explains how to customize the system and design reports.

## Oracle Inventory User's Guide

This guide describes how to define items and item information, perform receiving and inventory transactions, maintain cost control, plan items, perform cycle counting and physical inventories, and set up Oracle Inventory.

## Oracle Order Management

This guide describes how to enter sales orders and returns, copy existing sales orders, schedule orders, release orders, create price lists, and discounts for orders, run processes, and create reports.

## Oracle Payables

This guide describes how accounts payable transactions are created and entered in Oracle Payables. This guide also contains detailed setup information for Oracle Payables.

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## **Oracle Purchasing**

This guide describes how to create and approve purchasing documents, including requisitions, different types of purchase orders, quotations, RFQs, and receipts. This guide also describes how to manage your supply base through agreements, sourcing rules and approved supplier lists. In addition, this guide explains how you can automatically create purchasing documents based on business rules through integration with Oracle Workflow technology, which automates many of the key procurement processes.

## **Oracle Project Manufacturing User's Guide**

This guide describes the unique set of features Oracle Project Manufacturing provides for a project-based manufacturing environment. Oracle Project Manufacturing can be tightly integrated with Oracle Projects. However, in addition to Oracle Projects functionality, Oracle Project Manufacturing provides a comprehensive set of new features to support project sales management, project manufacturing costing, project manufacturing planning, project manufacturing execution and project quality management.

## **Oracle Receivables**

Use this manual to learn how to implement flexible address formats for different countries. You can use flexible address formats in the suppliers, banks, invoices, and payments windows.

## **Oracle Self Service Web Applications User's Guide**

This guide describes how Oracle Self Service Web Applications enable companies to provide a self-service and secure web interface for its employees, customers and suppliers. Employees can change their personal status, submit expense reports or request supplies; customers can check on their orders; and suppliers can share production schedules with their trading partners. This guide is available in HTML only.

## **Oracle Workflow Guide**

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

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## Reference Manuals

### **Oracle Technical Reference Manuals**

Each technical reference manual contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. You can order a technical reference manual for any Oracle Applications product you have licensed.

### **Oracle Manufacturing and Distribution Open Interfaces Manual**

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes open interfaces found in Oracle Manufacturing.

### **Oracle Applications Message Reference Manual**

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

### **Oracle Project Manufacturing Implementation Manual**

This manual describes the setup steps and implementation for Oracle Project Manufacturing.

### **Oracle Self-Service Web Applications Implementation Manual**

This manual describes the setup steps for Oracle Self-Service Web Applications and the Web Applications dictionary.

### **Oracle Applications Flexfields Guide**

This guide provides flexfields planning, setup, and reference information for the Oracle Pricing implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

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# Installation and System Administration Guides

## Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind, and major issues, for Applications-wide features such as Business Intelligence (BI), languages and character sets, and self-service applications.

## Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11i, much of the installation process is handled using Oracle One-Hour Install, which minimizes the time it takes to install Oracle Applications and the Oracle 8i Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle One-Hour Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

## Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11i. This guide describes the upgrade process in general and lists database upgrade and product-specific upgrade tasks. You must be at either Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0 to upgrade to Release 11i. You cannot upgrade to Release 11i directly from releases prior to 10.7.

## Using the AD Utilities

Use this guide to help you run the various AD utilities, such as AutoInstall, AutoPatch, AD Administration, AD Controller, Relink, and others. It contains how-to steps, screen shots, and other information that you need to run the AD utilities.

## Oracle Applications Product Update Notes

Use this guide as a reference if you are responsible for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11i. It includes new

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features and enhancements and changes made to database objects, profile options, and seed data for this interval.

### **Oracle Applications System Administrator's Guide**

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and on-line help, and manage processing.

### **Oracle Workflow Guide**

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

## **Training and Support**

### **Training**

We offer a complete set of training courses to help you and your staff master Oracle Applications. We can help you develop a training plan that provides thorough training for both your project team and your end users. We will work with you to organize courses appropriate to your job or area of responsibility. Training professionals can show you how to plan your training throughout the implementation process so that the right amount of information is delivered to key people when they need it the most. You can attend courses at any one of our many Educational Centers, or you can arrange for our trainers to teach at your facility. We also offer Net classes, where training is delivered over the Internet, and many multimedia-based courses on CD. In addition, we can tailor standard courses or develop custom courses to meet your needs.

### **Support**

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Pricing working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

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## Conventions

In this manual, we use a number of notational and text conventions to visually identify different kinds of information.

### Text Conventions

The following text conventions are used in this manual:

#### Note

A Note calls attention to an important feature or fact that is related to the contents of the previous paragraph. Here is an example of a Note:

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**Note:** A Note calls attention to an important feature or fact that is related to the contents of the previous paragraph.

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#### Warning

A Warning represents information about a condition that could prevent application or Application Integration from working correctly. Here is an example of a Warning:

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**Warning:** A Warning represents information about a condition that could prevent application or Application Integration from working correctly.

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## Do Not Use Database Tools to Modify Oracle Applications Data

***We STRONGLY RECOMMEND that you never use SQL\*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications tables, unless we tell you to do so in our guides.***

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL\*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data. Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications forms, you might change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving

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erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications forms to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. But, if you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL\*Plus and other database tools do not keep a record of changes.

## About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support and office automation, as well as Oracle Applications. Oracle Applications provides the E-business Suite, a fully integrated suite of more than 70 software modules for financial management, Internet procurement, business intelligence, supply chain management, manufacturing, project systems, human resources and sales and service management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers, and personal digital assistants, enabling organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and application products, along with related consulting, education and support services, in over 145 countries around the world.

# 1

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## Oracle Pricing

This chapter explains Oracle Pricing and includes the topic Overview of Oracle Pricing on page 1-2.

## Overview of Oracle Pricing

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**Note:** Oracle Pricing is licensed as Oracle Advanced Pricing.

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Oracle Pricing supports e-Business applications. Oracle Pricing provides an advanced, highly flexible pricing engine that executes pricing and promotional calculations for Oracle Order Management as well as other Oracle Applications.

Oracle Pricing has the power and flexibility to meet the needs of complex pricing situations found over a wide range of demanding industry business requirements which include:

- Consumer goods, telecommunications, services, high technology, automotive, and aerospace/defense businesses which sell to other businesses.
- Telemarketing, mail order catalog, and web store businesses which sell directly to consumers.

Oracle Pricing delivers pricing capabilities for all applications and more by first allowing you to efficiently set up your pricing information, and then model your complex data relationships that determine the correct price.

With Oracle Pricing, you can perform the following functions:

- Set a list price for an item or item hierarchy
- Set a list price based on volume breaks
- Usage Pricing / counter price - calculate price based on usage brackets
- Point break (all quantity in one bracket)
- Range Break (quantity in each bracket gets the price of that bracket)
- Set a list price/ discounts at multiple levels of flattened hierarchies and use precedence to select the right price/discount.
- Dynamically calculate the price based on simple or a complex formula
- Define a formula to create a price relation (price of item A is Price of Item B + \$20)
- Setup GSA prices
- Define pricing agreements
- Get a price/discount from an external source (my price = competitors price - 5%)

- Set a percent/fixed/lump sum discount or surcharge
- N-Dimensional Pricing (if width between 2-4 and thickness between 1-3 then multiple the price by 0.3)
- Benefit/surcharge based on total volume of multiple order lines of the same order
- Set up deals and promotions
- Buy one get one free
- Coupon issue (Buy over \$1000 and get a coupon of \$100 for future purchase)
- Issue gift-certificates
- Other item discount (Buy A and B get 20% off on C)
- Item Upgrade (For the price of 12 Oz. Shampoo get 16 Oz. Shampoo)
- Terms upgrade (Buy over \$100 and get upgraded to air shipment)
- Set discounts as “to be accrued”
- Setup freight and special charges
- Mark discounts as exclusive or incompatible to each other
- Cascading discounts (discounts to be applied on subtotals)
- Create your own eligibility conditions by grouping the qualifiers
- Define your own qualifier and qualifier sourcing rules (if today = Sunday then give 10%)

Oracle Pricing and its pricing engine work through open, business object oriented APIs. The following Oracle Application suites use the pricing engine:

- Oracle Order Management
- Oracle Customer Relationship Management

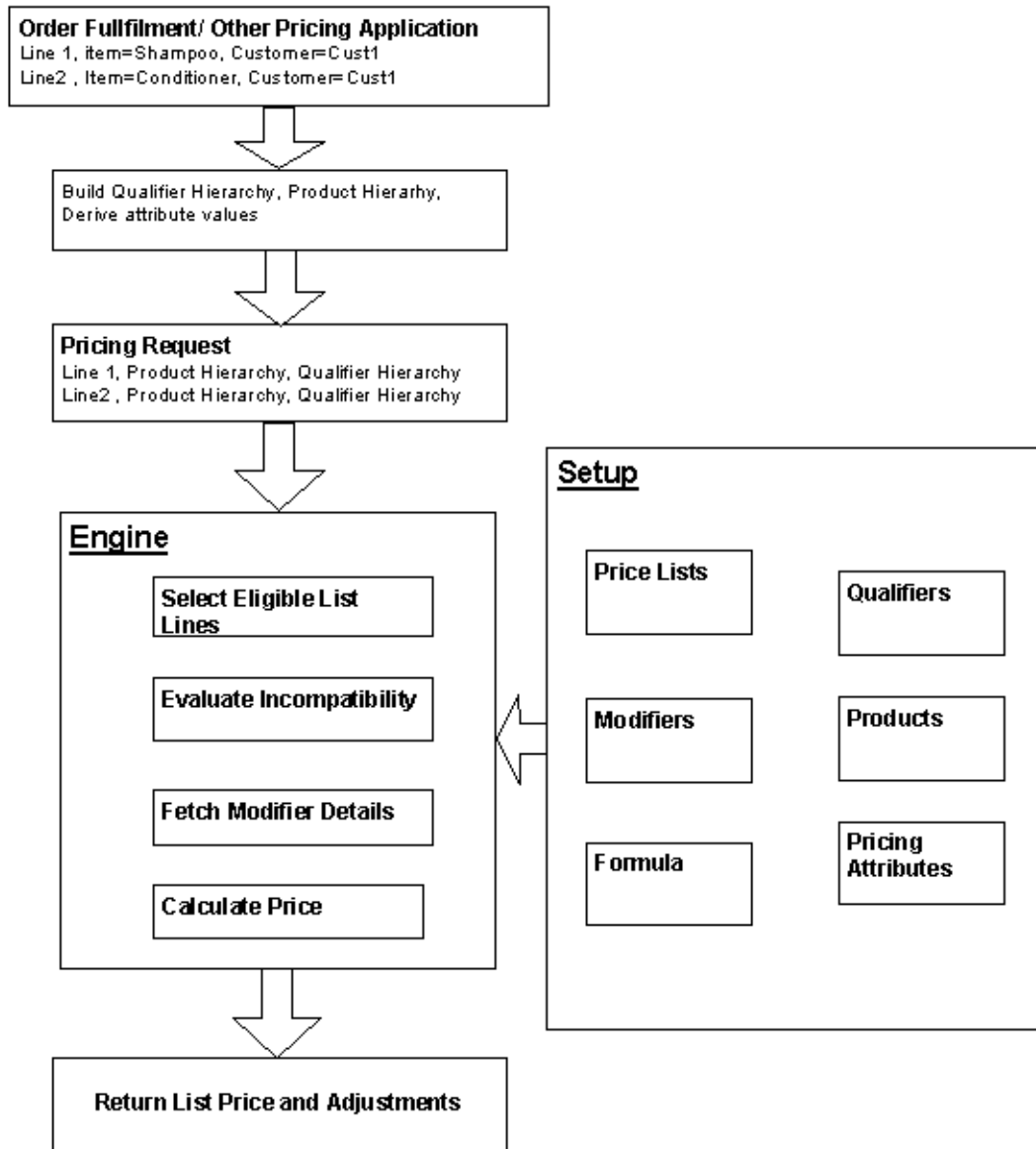
### **The Pricing Concept**

The pricing engine receives transaction information, prepares pricing requests, selects price lists and modifier lists, and applies price adjustments (benefits) to the transaction. Figure 1-1 provides a graphical representation of Oracle Pricing.

The pricing engine answers the following questions as it determines a price:

- Who qualifies for prices and benefits?
- What is the product hierarchy and what pricing attributes pertain to this item or service?
- How should I adjust the order price or order line price?

**Figure 1-1 Pricing Overview**



### **Who Qualifies?**

**Pricing qualifiers** control who is eligible for certain prices (price lists) and benefits (modifiers).

Some example qualifiers are:

- Customer Class = VIP
- Order Type = Special

### **What Is the Product Hierarchy and Pricing Attributes?**

The **product hierarchy** and **pricing attributes** control what is being priced or modified on a price list or modifier list.

An example of a product hierarchy with pricing attributes is All Plastic items of Grade B quality get 50% discount.

### **How Should I Adjust the Price?**

**Pricing modifiers** control how a modifiers affect the final price (selling price).

Some example modifiers are:

- Discount of 2%
- Buy 1 get 1 free
- Get 480 ml shampoo for the same price as 360 ml shampoo
- Get a coupon for 100 currency units if you buy over 1000 currency units

### **The Pricing Engine**

The advanced, flexible pricing engine performs pricing and benefit calculations for Oracle Order Management products and Oracle Customer Relationship Management products through open APIs.

The pricing engine performs the following functions:

- Prepares the price request structure
- Selects applicable price lists and modifier lists
- Determines base list price
- Calculates final selling price
- Applies benefits and surcharges (from modifier lists) to list price to determine selling price

## **Preparing the Price Request Structure**

The calling applications submit price requests. This function configures a pricing request into a pricing request structure. The pricing request structure provides information about all the qualifiers and product pricing attributes.

## **Selecting the Price List or Modifier List**

This function selects which price lists are eligible for the current pricing request. It uses the qualifiers and pricing attributes to select an eligible list of prices or modifiers it can apply to the pricing request lines according to the certain rules.

## **Determining List Price**

This function takes the validated price list lines and applies them to the pricing request lines. You can specify the list price on a price list as unit price, percent price, or formula.

## **Applying Price and Modifier Adjustments**

This function takes the validated modifier list lines and applies them to the pricing request lines.

The modifier function provides price adjustments such as discounts, price breaks, surcharges, coupons, item and term substitutions, and other item discounts. Discount and surcharges modifiers affect the selling price; freight charge modifiers do not affect the selling price.

## **Pricing Components**

### **Qualifiers**

Qualifiers control who receives benefits. They can assign discounts and promotions to:

- Specific customers
- Customer groups
- Order types
- Order amount
- Specific customer or group of customers

## Qualifier Groups

Qualifier groups allow you to group multiple conditions and to assign them to a single benefit. See Oracle Pricing, Qualifier Groups.

## Pricing Attributes

Pricing attributes control what is being priced or modified on a price list or modifier list.

## Price Lists

Price lists contain prices and currencies associated with products and services. Each price list contains basic header information with one or more item lines. Price lists can have:

- Prices for specific products and services or for product groups
- Prices as absolute values, percents of other prices, or as formulas
- Prices applicable to the entire organization or to one operating unit
- Negative prices

For more information, see Oracle Pricing, Price Lists.

## Modifiers

Pricing modifiers control how the pricing engine can modify the pricing requests and pricing request lines. The modifiers are:

- **Discount:** Reduces the price by a fixed amount or percentage or provides a new price.
- **Surcharge:** Increases the price by a fixed amount or percentage or provides a new price.
- **Item upgrade:** Replaces an ordered item with another item for the same price as the original item.
- **Other item discount:** Gives a price adjustment or benefit to a specified item on an order when the customer orders one or more specified items on that same order.
- **Coupon:** Issues a coupon as an offer of discount on other goods and services which is redeemable on a future pricing request.
- **Terms substitution:** Upgrades payment, shipping, and freight terms.

- Freight/Special charges: Charges for shipping and miscellaneous situations, for example, duty, handling charges, and insurance
- Promotional goods: Adds a new item to an order and gives this item a price adjustment or benefit when the customer orders one or more specific items on the same order.
- Price break: Applies a variable discount or surcharge price adjustment to a pricing request based on the break type and condition met. You can use both point- and range-type breaks.

**Table 1–1 Example of Qualifiers, Modifiers, and Pricing Attributes**

Example	Qualifier	Modifier	Product Hierarchy	Pricing attribute
XYZ corporation gets 10% discount on all the products	Customer = XYZ Corporation	10% discount		
If Order_Type = Return and customer class = Retail then apply 15% surcharge for all the "Electronic" items.	Order Type = Return Customer Class = Retail	15% Surcharge	Electronic Items	
Grade B Motor Oil gets \$20 off		\$20.00 discount	Motor Oil	Grade B

For more information, see Oracle Pricing, Modifiers.

## Formulas

Pricing formulas allow the pricing engine to determine item prices based on the following:

- A combination of pricing attributes and factors based on the value of a pricing attribute
- The list price on the price list line to which the formula is attached
- The list price on any specific price list line
- A numeric constant
- A customizable function

You can also attach a formula to a modifier line for the pricing engine to use to calculate discounts.

You can use two types of formulas:

- **Static:** You specify the formula and execute a concurrent process which calculates absolute price values.
- **Dynamic:** You specify the formula and the pricing engine uses the formula in its calculations each time that someone orders the product.

Form more information, see Oracle Pricing, Formulas.

### Pricing Service Items

The pricing engine prices service items in the same way that it prices inventory items. In Oracle Order Management, the parent item is the serviceable item and must be in the install base. Oracle Order Management passes both the serviceable item and the service item to the pricing engine; the pricing engine first prices the serviceable item and then prices the service item.

You can price service items as follows:

- **Unit price:** You set a list price for the service item.
- **Percent price:** You set a percentage; the price of the service item is that percentage of the serviceable item list price. To use this method, select the flag Service Item in the Service tab when you define the item.

When pricing service items, attend to the following order management attributes when pricing service items. They are passed through the pricing engine application program interface (API):

- **Ordered Quantity (API: P\_Line\_Tbl.Line\_Quantity):** The order quantity of the service item expressed in the in the serviceable item unit of measure.
- **Ordered UOM Code (API: P\_Line\_Tbl.Line\_Uom\_Code):** The unit of measure in the time scale.
- **Service Duration and Service Period (API: P\_line\_Tbl.UOM\_Quantity):** The duration of the service being ordered, for example, to order Computer Maintenance for one year, set Service Duration to 1 and Service Period to Year. You set these values in the Service tab when you enter the item in the order. In the API, P\_line\_Tbl.UOM\_Quantity is the service duration expressed in Ordered UOM Code service period.

## Oracle Order Management Service Item Pricing Example

Price list setup for laptop computer:

- Product: Laptop Computer
- Application Method: Unit Price
- UOM Code: EA
- List Price: 1000 currency units

Price list setup for computer service—unit price method:

- Product: Computer Service
- Application Method: Unit Price
- UOM Code: Month
- List Price: 10 currency units

Price list setup for computer service—percent price method:

- Product: Computer Service
- Application Method: Percent Price
- UOM Code: Month
- Percent Price: 2

Order line:

- Product: Computer Service
- Ordered Quantity: 1
- Ordered UOM: Month
- Service Period: Year
- Service Duration: 1
- Serviceable Item: Laptop Computer

List price calculation for computer service:

- Unit price method:  $10 \text{ currency units per month} * 12 \text{ months service period/duration} = 120 \text{ currency units}$
- Percent price method:  $(1000 \text{ currency unit laptop computer} * 2\% \text{ computer service percent price}) * 12 \text{ months service period/duration} = 240 \text{ currency units}$

### **Implementation Planning**

Oracle Pricing is an extremely flexible product. You can best use its powerful features by developing an implementation plan.

For more information on setting up Oracle Pricing, please refer to Oracle Pricing, Setting Up.

Create your plan by visualizing the price bands of an organization. Table 1-2 is a useful tool in mapping the modifiers of an organization to the components of Oracle Pricing, and source pricing data is based upon the following:

Assume that item “Super Wine” has an item category of “Wine”. An order for a quantity 15 was placed on “15-Jun-2000” for a customer “XYZ Corporation”, who belongs to a customer class “VIP”.

**Table 1–2 Common business pricing practices mapped to Oracle Pricing**

Buckets	Pricing Phases	Incompatibility Group	Qualifiers \ Product Attributes (Precedence)	Modifiers / Price List	Discount	Sub Total
Base Price	List Line Base Price	EXCLUSIVE	Customer Class - 'VIP' (310) Item Code - 'Super Wine' (220)	Corporate List - \$1000		
			Item Category - 'Wine' (290)	Preferred Vendors - \$800		
						\$1,000
Bucket 1	List Line Adjustments	Level 1	Item Quantity > 10 (800) Item Code - 'Super Wine' (220)	4 <sup>th</sup> July Promotion 10%	\$100	
			Customer Class - 'VIP' (310)	Summer Promotion 15%		
		Level 2	Customer id - 'XYZ Corp' (260)	VIP discount \$40	\$40	
			Customer id - 'XYZ Corp' (260)	Weekday Discount \$20		
	All Line Adjustments	Level 1	Item Category - 'Wine' (290)	General Discount - \$20	\$10	

**Table 1–2 Common business pricing practices mapped to Oracle Pricing**

<b>Buckets</b>	<b>Pricing Phases</b>	<b>Incompatibility Group</b>	<b>Qualifiers \ Product Attributes (Precedence)</b>	<b>Modifiers / Price List</b>	<b>Discount</b>	<b>Sub Total</b>
		Exclusive	Order Date < '01-Dec-2000' (510)	Seasonal Discount - \$10		
	Header Level Adjustments	Level 1		Preferred Customer 10%	100	
	Line Charges	Level 1		Handling Charge \$20	\$20	
	Header Level Charges					
						\$750
<b>Bucket 2</b>	Adjustments	Level 2		High usage surcharge 2%	(\$15)	
	All Line Adjustments					
	Header Level Adjustments					
	Line Charges					
	Header Level Charges					
	Header Level Charges					
						\$765

- **List price:** Decide whether your prices are at an individual product level or at the product hierarchy or both. Also, determine the precedence levels in your organization. Determine if you base list prices on the volume purchased. Plan the number of price lists. To get a better performance, minimize the number of price lists and price list lines by using a combination of qualifiers, modifiers, pricing attributes, and formulas.

*Based upon the source pricing data, product attribute Item Code - "Super Wine" for "Corporate" price list has a product precedence of 220, where as product attribute "Item Category - Wine" for "Preferred vendors" price list has a product precedence of 290. Pricing picks up a list of lower precedence and hence \$1000 from "Corporate List" is returned. This is because the pricing phase "List line base price" has "Precedence" for resolving the incompatibility.*

- **Modifier types:** Categorize your discounts and promotions into the appropriate modifier types; each modifier type produces different results. For example, the Other Item Discount requires the customer to order the original item as a prerequisite to offering the discount; however, the Promotional Goods discount adds a new line to the order.
- **Buckets:** The pricing engine may calculate different selling prices depending on how you group your discounts into buckets. Plan your cascading discounts so that you can assign discounts to buckets based on the subtotal on which each discount needs to be applied.

*Based upon the source pricing data, "4th July promotion" of 10% defined in Bucket 1 is applied on the list price of \$1000, where as High Usage surcharge of 2% defined in Bucket 2 is applied on the subtotal \$750 from bucket 1.*

- **Phases:** Decide to which event and phase each discounts and promotions belong. For example, Oracle recommends that you place:
  - Line level discounts in the Line Adjustments phase
  - A promotion such as Buy item A and item B and get a discount on Item C in the All Lines phase
  - Modifiers to apply when orders ship in a ship event

Phases are also tied to the order events. To apply a discount only when an order is shipped, assign the modifier to a phase which is executed in SHIP event.

For more information, see Oracle Pricing, Setting Up Phase Events.

- Incompatibility groups and exclusivity: Determine the pricing bands to which the various discounts and promotions belong. Determine which discounts and promotions apply on top of one another, are incompatible, or are exclusive. Analyze all discount schemes and promotions to determine the impact.

*Based upon the source pricing data, the bucket "Bucket 1" and pricing phase "List Line Adjustments" has 2 Incompatibility groups called "Level 1" and "Level 2". "Level 1" has 2 promotions "4th July Promotion" and "Summer Promotion". "4th July Promotion" has a product precedence of 220 and "Summer promotion" has a qualifier precedence of 310. "4th July promotion" is picked from incompatibility group "Level 1" because it has the lower precedence.*

*Incompatibility Group "Level 2" has 2 discounts "VIP discount" and "Weekday Discount", both having a qualifier precedence of 260. Pricing resolve the incompatibility by picking the best discount.*

*Bucket "Bucket 1" and pricing phase "All Line Adjustments" has 2 incompatibility groups "Level 1" and "Exclusive". Although "General Discount" in "Level 1" has a lower product precedence, "Seasonal discount" for \$10 which is in the "Exclusive" bucket is picked up by the engine.*

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**Note:** The pricing engine determines incompatibility and exclusivity within phases.

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- Modifier levels: Categorize the modifiers into line, group line, and order modifiers. How the pricing engine treats a modifier can change depending on your classification.
- Automatic, Override, Asked for, and Accrual flags: It is very important that you understand how the pricing engine operates with these flags so that you can set them to reflect your business needs. Analyze all of your discounts, promotions, and charges in terms of these features.
- Other setups: Precedence preferences, profile options, break types, and pricing attribute control the pricing engine behavior. Determine the values for these settings that reflect your business needs.
- Precedence setups: Evaluate default precedence values for qualifiers and product hierarchy and change them to reflect your business needs.

For a list of seeded precedence numbers, see Oracle Pricing, Appendix B.

- Unit of Measure: Decide the pricing units of measure for each item because:
  - Whether the pricing engine selects a modifier depends on the unit of measure
  - The list price in the order unit of measure overrides the precedence. When it processes a pricing request, the pricing engine first chooses eligible price list lines whose unit of measure matches the calling unit of measure. If there are multiple price list lines with matching unit of measure, the pricing engine chooses the price list line with the better precedence. If there are no price list lines with matching unit of measure, the pricing engine looks for price list lines with selected primary unit of measure flag for that item, then chooses the best precedence price list line.

Determine whether you need to set up new qualifier segments and sourcing rules. While Oracle Pricing has certain qualifier segments and sourcing rules seeded, you may need to define discounts, promotions, and charges based on other a qualifier segments.

For more information. see Oracle Pricing, Default tribute Sourcing Rules.



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## Setting Up

This chapter tells you everything you need to know about setting up Oracle Pricing, as well as other integrated Oracle Applications, including these topics:

- Overview of Setting Up on page 2-2
- Creating Qualifier Contexts and Qualifier attributes on page 2-5
- Creating Pricing Attribute contexts and pricing attributes on page 2-11
- System Sourcing on page 2-25
- Event Phases on page 2-27
- Profile Options on page 2-33

## Overview of Setting Up

This section contains an overview of each step you need to complete to set up Oracle Pricing. For instructions on how to complete each task, see the setup sections indicated in each step below.

Some of the steps below you may not need to perform if you've already performed a common-application setup (setting up multiple Oracle Applications products).

### Oracle Applications Implementation Wizard

If you are implementing more than one Oracle Applications product, it is recommended that you use the Oracle Applications Implementation Wizard (AIW) to coordinate your setup activities. The Wizard guides you through the setup steps for the applications you have installed, suggesting a logical sequence that satisfies cross-product implementation dependencies and reduces redundant setup steps.

You can use the Wizard to see a graphical overview of setup steps, read on-line help for a setup activity, and open the appropriate setup window. You can also document your implementation, for further reference and review, by using the Wizard to record comments for each step.

For additional information, see Oracle Applications Implementation Wizard User's Guide

### Setup Underlying Oracle Applications Technology

The Wizard guides you through the entire Oracle Applications setup, including system administration. However, if you do not use the Implementation Wizard, you need to complete several other setup steps, including:

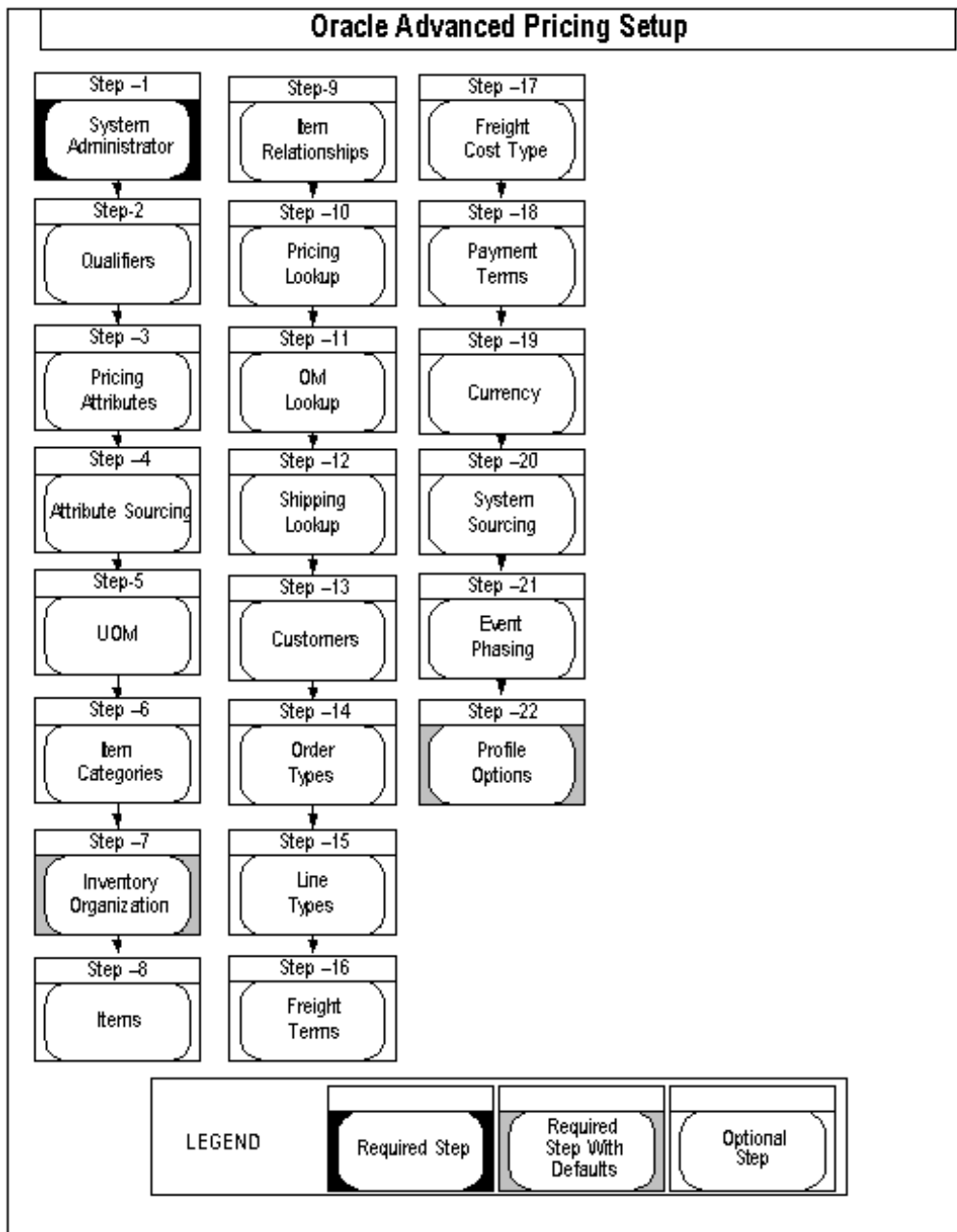
- Performing system-wide setup tasks such as configuring concurrent managers and printers
- Managing data security, which includes setting up responsibilities to allow access to a specific set of business data and complete a specific set of transactions, and assigning individual users to one or more of these responsibilities

For additional information, see Oracle Applications Implementation Wizard User's Guide and also Oracle Applications System Administrator's Guide

### Setup Flow

Some of the steps outlined in this flowchart and setup checklist are Required and some are Optional. Required Step With Defaults refers to setup functionality that comes with pre-seeded, default values in the database; however, you should review those defaults and decide whether to change them to suit your business needs. If you want or need to change

them, you should perform that setup step. You need to perform Optional steps only if you plan to use the related feature or complete certain business functions.



## Setup Steps

### Step 1. Performing System Administration Steps

**Default:** None

You must assign users who will setting up Oracle Pricing to the Oracle Pricing Manager responsibility

See: Oracle System Administrators User Guide, Responsibilities.

**Context:** You need to perform this step for each user you wish to include access to the Oracle Pricing Manager responsibility. You should also perform steps 19-22.

### Step 2.1 Creating Qualifier Contexts

**Default:** Predefined Oracle Pricing Qualifier Contexts.

For a list of predefined Oracle Qualifier Contexts, see Oracle Pricing, Appendix B.

If you skip this step, users will only be able to chose predefined Oracle qualifier contexts and qualifier attributes for price and benefit eligibility.

This step should be performed after you have specified your requirements to take best advantage of the flexibility of Oracle Pricing for managing pricing in your enterprise. Oracle Pricing includes some seeded qualifiers for use with Oracle Order Management. If you are not using Oracle Order Management or you require additional pricing qualifiers you should define these in this step.

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**Note:** Please note that qualifiers are based on flexfields. Oracle Pricing has predefined several basic qualifiers contexts, qualifier attributes, and associated values. Any modifications to these predefined attributes will change the behavior of the system and could potentially corrupt the pricing data. It is highly recommended that you do not make any changes to the predefined qualifier contexts.

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Qualifiers provide a highly configureable and flexible method of defining the rules which your business uses to manage its pricing. Companies frequently set prices and discounts across multiple hierarchies, e.g. customer and geographical, and at different levels in these hierarchies. Each level in these hierarchies at which your business sets its pricing and discounting should be defined as a qualifier. These levels in your pricing hierarchies can then be used in qualifier rules for price lists, discounts and promotions etc. to decide who is eligible to receive which prices, benefits or charges.

In addition, any other element which your business uses to manage pricing eligibility should be setup as a qualifier. For ease of use and management of qualifiers, Oracle Pricing provides a mechanism of grouping qualifiers according to their business use, e.g. customer qualifiers may be placed in a different context to order qualifiers.

Qualifier Contexts (hierarchies) are setup in the Oracle Application Descriptive flexfields Segments window. Descriptive flexfields are a special feature of Oracle Applications. They help you customize applications, by holding particular information your enterprise needs where you need it, and you determine exactly what information to store.

The order in which you sequence segments in a context, and across contexts, determines which Qualifiers have priority over others when the pricing engine is forced to choose between multiple prices, incompatible benefits or charges that are eligible to be applied to a request. With this in mind you should design your Qualifier flexfield such that the sequence number of each segment is unique across the Qualifier descriptive flexfield, with your most specific Qualifiers having the lower segment sequence numbers; in other words the sequence number of each Qualifier segment is used to order your Qualifiers according to priority.

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**Note:** Oracle Pricing uses the term precedence when referring to descriptive flexfield segment sequence numbers for Qualifier contexts.

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**Qualifier Precedence:**

When defining your customer hierarchy, the lowest level in your hierarchy would generally have the lowest flexfield segment sequence number so that if the pricing engine needed to choose between a price for an item negotiated with a specific customer versus a price for the same item which was given to all Customers in a Customer Class, and you wished the engine to select the customer specific price, you would set the customer qualifier to be more specific (i.e. assign a lower sequence number) than the Customer Class Qualifier. In this way you are effectively flattening your pricing hierarchy across the Qualifier Descriptive Flexfield. Each hierarchy may be defined within a context or across contexts depending on how many levels you have in your pricing hierarchies.

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**Note:** When using the segment sequence to determine which prices or modifiers should be applied to a request line, the pricing engine considers all Qualifier segments plus the segments in the Item context within the Pricing Attribute Descriptive flexfield.

Given this, when ordering your segments according to pricing priority, you should ensure that the segment sequence number is unique across all Qualifier contexts, and the Item context within the Pricing Attribute Descriptive flexfield structure.

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**►► To define a new Qualifier context:**

1. Navigate to the Descriptive Flexfields Segments window.

Figure 2–1 Qualifier Contexts

Descriptive Flexfield Segments

Application: **Oracle Pricing** Title: **Qualifier Contexts**

Freeze Flexfield Definition Segment Separator: **Period (. )**

**Context Field**

Prompt: **Context Value**  Value Required

Default Value:   Override Allowed (Display Context)

Reference Field:

**Context Field Values**

Code	Name	Description	Enabled
Global Data Elements	Global Data Elements	Global Data Element Context	<input checked="" type="checkbox"/>
CUSTOMER	Customer	Customer Context	<input checked="" type="checkbox"/>
HZCUSTOMER	HZCUSTOMER	NEW Customer Conext	<input type="checkbox"/>
MODLIST	Modifier List	Modifier List Context	<input checked="" type="checkbox"/>
Market Segment	Market Segment	Market Segment	<input checked="" type="checkbox"/>
ORDER	Order	Order Context	<input checked="" type="checkbox"/>

Buttons: **Compile** **Segments**

---

**Note:** Although the Descriptive flexfield segments window is used to define Qualifier Contexts, do not extend the definition of the entity like the traditional descriptive flexfield.

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**Note:** Since Oracle Pricing does not support it, do not create segments in the Global Data Elements context.

---

2. Select the Oracle Pricing Application, Qualifier Contexts title.
3. In the Context Field Value region, Code field, add a user friendly short code for the context.
4. In the Name field, *optionally* change the user friendly short code to another more meaningful value.
5. In the Description field, enter an *optional* description
6. Save your work.

**Context:** You need to perform this step for each qualifier context you wish to add.

## Step 2.2 Creating Qualifier attributes and defining the domain for these attributes

**Default:** Predefined Oracle Pricing Qualifier Attributes and associated data sources.

For a list of predefined Oracle Qualifier Attributes and default data sources, see Oracle Pricing, Appendix B.

Qualifier attributes are defined using the Oracle Application Descriptive Flexfields Segments window.

### ►► To define a new qualifier attribute:

1. Navigate to the Descriptive Flexfields Segments window.

**Figure 2–2 Qualifier Attributes**

The screenshot shows a window titled "Segments Summary (Qualifier Contexts) - Customer". It contains a table with the following columns: Number, Name, Window Prompt, Column, Value Set, and Enabled. The table lists various qualifier attributes with their corresponding values and checked status in the Enabled column.

Number	Name	Window Prompt	Column	Value Set	Enabled
210	AGREEMENT_NAME	Agreement Name	QUALIFIER_ATTRIBUT		<input checked="" type="checkbox"/>
230	GSA	GSA	QUALIFIER_ATTRIBUT	QP: Yes/No	<input checked="" type="checkbox"/>
240	AGREEMENT_TYPE	Agreement Type	QUALIFIER_ATTRIBUT	QP_AGREEMENT_TYPE	<input checked="" type="checkbox"/>
250	SHIP_TO	Ship To	QUALIFIER_ATTRIBUT	QP_SHIP_TO	<input checked="" type="checkbox"/>
260	SOLD_TO_ORG_ID	Customer Name	QUALIFIER_ATTRIBUT	QP_CUSTOMER_NAME	<input checked="" type="checkbox"/>
270	SITE_ORG_ID	Site Use	QUALIFIER_ATTRIBUT		<input checked="" type="checkbox"/>
280	BILL_TO	Bill To	QUALIFIER_ATTRIBUT		<input checked="" type="checkbox"/>
310	CUSTOMER_CLASS_C	Customer Class	QUALIFIER_ATTRIBUT	QP_CUSTOMER_CLASS	<input checked="" type="checkbox"/>
320	SALES_CHANNEL	Sales Channel	QUALIFIER_ATTRIBUT	QP_SALES_CHANNEL_CC	<input checked="" type="checkbox"/>
340	ACCOUNT_TYPE	Account Type	QUALIFIER_ATTRIBUT	QP_ACCOUNT_TYPE	<input checked="" type="checkbox"/>

At the bottom of the window, there are three buttons: "Value Set", "New", and "Open".

2. Select the Oracle Pricing Application, Qualifier Contexts title.
3. In the Context Field Value region, Code field, select the short code for which you wish to define additional qualifiers.

4. Select Segments.

---

---

**Warning:** Segment 1-30 of each context are reserved for future use. Prefix the contexts and segment names with unique short name to avoid contention with seeded attributes in the future upgrades. All numeric and date qualifier or pricing attributes must have a valid value set attached, otherwise the attribute values will be treated as VARCHAR2

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---

5. In the Number field, enter a numeric value for the dimension. Each segment must have a unique value across all your qualifier contexts and all segments in the Item context within your Pricing Attribute descriptive flexfield.

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**Note:** Each segment number indicates the specificity or *default* precedence number that maybe used when the pricing engine has to choose between multiple prices or incompatible price adjustments, benefits or charges that are eligible to be applied to a request line The pricing engine will select the price or modifier that has qualified with the qualifier attribute that has the lowest precedence, i.e. is the most specific. For a listing of predefined precedence numbers for seeded qualifier contexts, see Oracle Pricing, Appendix B.

- The default precedence number for qualifier attributes can be updated when assigning qualifiers to secondary price lists. See Oracle Pricing, Price Lists.
  - The default precedence number for qualifier attributes can be updated when assigning qualifiers to modifier lists and modifier list lines. See Oracle Pricing, Modifiers.
- 
- 

6. In the Name field, enter a value for the qualifier attribute name.

7. In the Window Prompt field, enter the value you wish to appear when selecting the qualifier name.

8. In the Column field, select a qualifier attribute you wish to map qualifier values to for database storage. Valid values for the Qualifiers context are QUALIFIER\_ATTRIBUTE1 through QUALIFIER\_ATTRIBUTE100.

9. In the Value Set field, enter a predefined value set to establish possible values for selection when entering qualifier values.

---

---

**Note:** When entering Value Sets for the Qualifiers Context, you must enter values sets that use Value Validation of Validation type:

- Independent
  - None
  - Table
- 
- 

#### 10. Save your work.

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**Warning:** You must also create a default sourcing rule for each qualifier attribute that you define since the pricing engine uses sourcing rules to determine attribute values. Ensure that you perform Step 4 for each qualifier attribute you define.

---

---

Context: You need to perform this step for each qualifier attribute you may wish to add.

### Step 3.1 Creating Pricing Contexts

Default: Predefined Oracle Pricing Attribute Contexts.

For a list of predefined Oracle Pricing Contexts, see Oracle Pricing, Appendix A.

If you skip this step, users will only be able to chose predefined Oracle pricing contexts and associated attribute values for benefit options.

Pricing Attributes are a powerful feature of Oracle Pricing which allows you to define what it is that you are pricing. This may include factors which effect the price of the item, additional definition without the need to create an item or managing pricing and discounting at a level higher than item in your product hierarchy. For ease of use and management of pricing attributes, Oracle Pricing provides a mechanism of grouping pricing attributes according to their business use, e.g. service item pricing attributes may be placed in a different context to your serviceable item pricing attributes.

---

---

**Note:** Each level in your product hierarchy at which your business sets it's pricing and discounting should be defined as a pricing attribute in the seeded context, Item. This step should be performed after you have specified your requirements to take best advantage of the flexibility of Oracle Pricing for managing pricing in your enterprise

---

---

Oracle Pricing includes some seeded pricing attributes for use with Oracle Order Management. If you are not using Oracle Order Management or you require additional pricing attributes you should define these in this step.

Pricing Contexts are setup in the Oracle Application Descriptive Flexfields Segments window. Descriptive flexfields are a special feature of Oracle Applications. They help you customize applications, by holding particular information your enterprise needs where you need it, and you determine exactly what information to hold. As with Qualifiers, the order in which you sequence your segments in the seeded item context should reflect the structure of your product pricing hierarchy. When defining your product pricing hierarchy, the lowest level in your hierarchy would generally have the lowest flexfield segment sequence number so that if the pricing engine needed to choose, for example, between a price for a specific item, versus a price for an item category, you would set the item segment to be more specific (i.e., assign a lower sequence number) than the product group segment.

In this way you are effectively flattening your pricing hierarchy in the item context of your Pricing Attribute Descriptive Flexfield, each level in your hierarchy, at which you wish to manage pricing, being represented as a segment

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---

**Note:** When using the segment sequence to determine which prices or modifiers should be applied to a request line, the pricing engine considers all Qualifier segments plus the segments in the item context in the Pricing Attribute Descriptive Flexfield. Given this, when ordering your segments according to pricing priority, you should ensure that the segment sequence number is unique across the Qualifier Flexfield and the item context in the Pricing Attribute Descriptive Flexfield.

---

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## » To define a new Pricing Context:

**Figure 2–3 Pricing Contexts**

The screenshot shows the 'Descriptive Flexfield Segments' window for the 'Oracle Pricing' application. The title is 'Pricing Contexts'. The 'Segment Separator' is set to 'Period (.)'. The 'Context Field' section has a 'Prompt' of 'Context Value', 'Value Required' is unchecked, and 'Override Allowed (Display Context)' is checked. Below is a table of 'Context Field Values'.

Code	Name	Description	Enabled
Dimensions	Dimensions	Item dimensions like width, height	<input checked="" type="checkbox"/>
IColor	icolor	Color for Item	<input checked="" type="checkbox"/>
ITEM	Item	Item Context	<input checked="" type="checkbox"/>
LINEAMT	Line Amount	Line Amount Context	<input type="checkbox"/>
PRICING ATTRIBUTE	Pricing Attribute	Pricing Attribute Context	<input checked="" type="checkbox"/>
VOLUME	Volume	Volume Context	<input checked="" type="checkbox"/>

Buttons for 'Compile' and 'Segments' are located at the bottom right of the window.

---

**Note:** Although the Descriptive flexfield segments form is used to define pricing contexts, pricing contexts do not extend the definition of the entity like the traditional descriptive flexfield.

Pricing attributes are based on flexfields. Oracle Pricing has predefined several basic pricing contexts, pricing attributes, and associated values. Any modifications to these attributes will change the behavior of the system and could potentially corrupt the pricing data. It is highly recommended that you do not make any changes to the predefined pricing attribute contexts.

---

1. Navigate to the Descriptive Flexfields Segments window.

---

---

**Note:** Since Oracle Pricing does not support it, do not create segments in the Global Data Elements context.

---

---

2. Select the Oracle Pricing Application, Attributes Contexts title.
3. In the Context Field Value region, Code field, add a user friendly short code for the new attribute hierarchy.
4. In the Name field, *optionally* change the user friendly short code to another more meaningful value.
5. In the Description field, enter an *optional* description for the attribute context.
6. Save your work.

Context: You need to perform this step for each pricing context you wish to add.

### **Step 3.2.Creating Pricing Attributes and Pricing Attribute values**

Default: Predefined Oracle Pricing Attributes.

For a list of predefined Oracle Pricing Contexts and default data sources, see Oracle Pricing, Appendix A.

If you skip this step, users will only be able to chose predefined Oracle pricing attributes and associated attribute values for benefit options.

Attribute dimensions individual attributes are defined using the Oracle Application Descriptive Flexfields Segments window.

#### **►► To define a new Pricing attribute:**

1. Navigate to the Descriptive Flexfields Segments window.

Figure 2–4 Pricing Attributes

The screenshot shows a window titled "Segments Summary (Pricing Contexts) - Item". It contains a table with the following columns: Number, Name, Window Prompt, Column, Value Set, Displayed, and Enabled. The first two rows are populated with data, and the rest are empty. Below the table are three buttons: "Value Set", "New", and "Open".

Number	Name	Window Prompt	Column	Value Set	Displayed	Enabled
220	INVENTORY_ITEM_ID	Item Number	PRICING_ATTRIBUTE1		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
290	ITEM_CATEGORY	Item Category	PRICING_ATTRIBUTE2		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>

Buttons: Value Set, New, Open

2. Select the Oracle Pricing Application, Pricing Contexts title

---

**Warning:** For customers who are upgrading from Release 11 Oracle Pricing who use item segments of the Item context flexfield, or new customers who are setting up Oracle Pricing 11i, if you plan on utilizing Pricing\_attribute3 to pricing\_attribute23 in the item context of the flexfield Pricing Context, you must perform the following steps.

- Enable the relevant pricing flexfield attributes in the item context.
  - Assign the same value set as of the corresponding item key flexfield segment to these attribute to which that segment has been mapped.
- 

3. In the Context Field Value region, Code field, select the short code for which you wish to define additional attribute.

4. Select Segments.

---

---

**Warning:** Segment 1-30 of each context are reserved for future use. Prefix the contexts and segment names with unique short name to avoid contention with seeded attributes in the future upgrades. All numeric and date qualifier or pricing attributes must have a valid value set attached, otherwise the attribute values will be treated as VARCHAR2.

---

---

5. In the Number field, enter a numeric value for the dimension. Each segment must have a unique value within a qualifier hierarchy.

---

---

**Note:** Each segment number number in the item hierarchy, i.e seeded item context, indicates the specificity or *default* precedence number that maybe used when the pricing engine has to choose between multiple prices or incompatible price adjustments, benefits or charges that are eligible to be applied to a request line The pricing engine will select the price or modifier that has qualified with the pricing attribute that has the lowest precedence, i.e. is the most specific. For a listing of predefined precedence numbers for seeded pricing contexts, see Appendix A.

- The default precedence number for pricing attributes can be updated when assigning pricing attributes to price list lines. See Oracle Pricing, Price Lists Chapter.
  - The default precedence number for pricing attributes can be updated when assigning pricing attributes to modifier lists and modifier list lines. See Oracle Pricing, Modifiers Chapter.
- 
- 

6. In the Name field, enter a value for the pricing attribute name.

7. In the Window Prompt field, enter the value you wish to appear when selecting the pricing attribute name.

8. In the Column field, select a pricing attribute you wish to map attribute values to for database storage. Valid values for the pricing attribute context are PRICING\_ATTRIBUTE1 through PRICING\_ATTRIBUTE100.

9. In the Value Set field, enter a predefined value set to establish possible values for selection when entering pricing attribute values.

---

---

**Note:** When entering Value Sets for the Pricing Context, you must enter values sets that use Value Validation of Validation type:

- Independent
  - None
  - Table
- 
- 

10. Save your work.

---

---

**Warning:** You must also create a default sourcing rule for each pricing attribute that you define since the pricing engine uses sourcing rules to pricing attribute values. Ensure that you perform setup Step 4 for each pricing attribute you define.

---

---

Context: You need to perform this step for each pricing attribute you may wish to add.

## Step 4. Attribute Sourcing

Default: Predefined Oracle Pricing Attribute default sourcing rules.

For a listing of predefined pricing attribute contexts, see Appendix A.

For a listing of predefined qualifier contexts, see Appendix B.

This step is required if you have defined any additional qualifiers or pricing attributes in steps 1 and 2, *or* you wish to change the defaulting source that has been seeded for a seeded qualifier or pricing attribute. Oracle provides predefined sourcing rules for attribute mapping, both for qualifiers and pricing contexts, to allow users a list of values when selecting eligibility criteria.

Qualifier and pricing attribute sourcing is required in order to supply a value for a qualifier or non-user enterable pricing attribute before pricing a transaction. A sourcing rule is setup to derive the value for the qualifier or pricing attribute from the transaction itself or from another attribute of the transaction, e.g. customer class can be derived from the customer on the order. In this way, attribute sourcing builds additional information about a transaction that could potentially be used to qualify for or derive a price, benefit or charge for, the transaction. In addition, attribute sourcing includes powerful validation rules which allow you to configure sourcing to conditionally source qualifiers and pricing attributes according to your business needs.

See: Oracle Pricing, Default Attribute Sourcing RulesChapter.

### **Step 5.1 Units Of Measure**

Default: None

You must define units of measure in order to utilize Oracle Pricing. You should define the units of measure in which you supply items.

This step is required if you wish to:

- Price or discount items.  
You must define a unit of measure class and units of measure to represent your non-monetary accruals, for example, Points. The profile option QP: Accrual UOM Class should be set to the unit of measure class that you define.
- Give non-monetary accruals as benefits.  
You must define a unit of measure class and units of measure to represent your non-monetary accruals, for example, Points. The profile option QP: Accrual UOM Class should be set to the unit of measure class that you define.
- Define qualifier rules which include the seeded qualifiers Line Volume or Line Weight.  
You should define the units of measure in which you supply items

**Context:** You may not need to perform this step if you have already installed and set up Oracle Inventory or performed this common-applications setup for another Oracle Product.

See Oracle Inventory Users Guide, Defining Unit of Measure.

### **Step 5.2 Define Unit of Measure Conversions**

**Default:** None

You need to define the conversion rates between the base unit of measure and other units of measure within a UOM class if you want to be able to price and discount an item in units of

measure other than its primary unit of measure. Oracle pricing uses these conversions to automatically convert transaction quantities to the primary pricing unit of measure defined on the price list when pricing cannot find a price in the transaction unit of measure. In addition, all price adjustments, benefits, and charges need to be defined in the same unit of measure as the unit of measure used on the price list.

**Context:** You may not need to perform this step if you have already installed and set up Oracle Inventory or performed this common-applications setup for another Oracle Product.

See Oracle Inventory Users Guide, Defining Unit of Measure Classes.

## **Step 6. Define Item Category sets and Item Categories**

**Default:** Seeded category set Inv.Items, and associated default seeded category code combination MISC.MISC.

You can utilize only the standard predefined Item Categories context flexfield structure defined for the Item Categories Key flexfield within this release of Oracle Pricing. You can, however, change the default category code combination for the seeded Inventory category.

If you do not plan on utilizing Oracle Category functionality for associated price or benefits, you can skip this step.

You must design and define any item categories and category sets that you wish to price and discount by. These categories and category sets should be defined for the standard seeded Item Categories flexfield structure. Oracle Pricing will not consider any new structures that you setup for your Item Categories Flexfield.

See Oracle Inventory Users Guide, Defining Category Sets and Categories.

See also Oracle Application Flexfields Users Guide, Key Flexfields in Oracle Applications, Item Categories Flexfield

**Context:** You may not need to perform this step if you have already installed and set up Oracle Inventory or performed this common-applications setup for another Oracle Product. If you do not plan on utilizing Oracle Category functionality for associated price or benefits, you can skip this step.

## **Step 7. Inventory Organization Setup**

**Default:** None

You must define at least one item validation organization in Oracle Inventory. This is the organization that items are validated and viewed against when entering items in the Price List and Modifier Setup forms.

See: Oracle Inventory Users Guide, Setting Up Oracle Inventory.

**Context:** You may not need to perform this step if you have already installed and set up Oracle Inventory or performed a common-applications setup.

### **Step 8. Defining Item Information**

Default: None

Only items that have been defined to Oracle will be considered eligible for price or benefits.

Define the items that you wish to price and discount and assign them to the validation organization/s defined in step 7. You may not need to perform this step if you have already installed and set up Oracle Inventory or performed a common-applications setup. If you wish to define qualifier rules which include the seeded qualifiers Line Volume or Line Weight you must set the volume and/or weight attributes of each item as this is used by attribute sourcing to derive the transaction line weight or volume.

See Oracle Inventory Users Guide, Items

**Context:** You may not need to perform this step if you have already installed and set up Oracle Inventory or performed this common-applications setup for another Oracle Product.

### **Step 9. Create Item Relationships**

Default: None

This step is required if you wish to give item upgrade benefits. You must define a Promotional Upgrade item relationship from the ordered item to the item you wish to give as an upgrade. You should define your item relationships for the item validation organization.

Set up promotional upgrade items as follows:

- The ordered item and the promotional item need to have the same base unit of measure and unit of measure conversions.
- The modifier unit of measure and the pricing unit of measure on the order line need to be the same.

If those entities are not the same, the substitution can fail

### **Step 10. Define Pricing Lookups**

Default: Lookup Type Dependent

Lookup Codes supply many of the lists of values in Oracle Pricing. For a listing of predefined Lookup Types and associated lookup values, see Oracle Pricing, Appendix C.

You only need to define additional values for these types if required. Lookup Code Values are the valid entries that appear in the list of values. They make choosing information quick

and easy, and they ensure that users enter only valid data into Oracle Pricing. You can add new Lookup Value at any time. You can set the Enable Flag for a Value to No, so that it will no longer appear in the list of values, or you can use the Start and End Dates to control when a value will appear in a list.

Suggestion: You should use Start and End Dates to control when values appear in a list

**Table 2–1 Pricing Lookups**

<b>Lookup Type</b>	<b>Lookup Description</b>
Define Incompatibility Groups	Add additional Incompatibility Groups if you require greater than three levels of incompatibility in a pricing phase. Note: only the seeded EXCL - Exclusive group is treated as incompatible with All.
Define Pricing Group Sequences (Pricing Buckets)	Add additional pricing group sequences / buckets if you require further subtotals or cascading of modifiers. Pricing Group Sequence "0" is reserved for base price calculation.
Define Agreement Types	Add additional Agreement Types according to your business needs for categorization of agreements.
Define Request Types	You will need to define a new Request Type to identify your transaction application if you are integrating Oracle Pricing with an application other than Oracle Order Management.
Define Source System Code	You should define a new Source System Code if the source of the pricing data is any application other than Oracle Pricing. This Source System Code will be used to identify the origin of the data, and can be used to control pricing.

## Step 11. Order Management Lookups

Default: Lookup type Dependent

For a list of valid default values for these lookups please refer to Oracle Order Management Users Guide, Appendix Lookups.

**Table 2–2 Order Management Lookups**

Lookup Type	Lookup Description
Define Sales Channel	Required if you price, give benefits or charge by Sales Channel
Define Order Categories	Required if you price, give benefits or charge by Order Category
Define Line Categories	Required if you price, give benefits or charge by Order Line Category.
Define Order Sources	Required if you price, give benefits or charge by Order Line Category.
Define Shipment Priorities	Required if you price, give benefits or charge by Shipment Priority
Define Ship methods	Required if you price, give benefits, including upgrading the Shipping Method, or charge by Shipment Method

**Context:** You may not need to perform this step if you have already installed and set up Oracle Order Management or performed a common-applications setup.

## Step 12. Shipping Lookups

Default: Lookup type Dependent

For a list of valid default values for these lookups please refer to Oracle Shipping Users Guide

**Context:** You may not need to perform this step if you have already installed and set up Oracle Order Management or performed a common-applications setup.

### **Step 13.1 Setup Customer Class**

**Default:** None

Required if you price, give benefits or charge by Customer Class

See: Oracle Receivables, Defining Lookups

**Context:** You may not need to perform this step if you have already installed and set up Oracle Receivables or performed a common-applications setup.

### **Step 13.2 Setup Profile Classes**

**Default:** None

Required if you price, give benefits or charge by Customer Account Type.

See: Oracle Receivables, Profile Classes

**Context:** You may not need to perform this step if you have already installed and set up Oracle Receivables or performed a common-applications setup.

### **Step 13.3 Define Customers**

**Default:** None

Required if you price, give benefits or charge by Customer.

See: Oracle Receivables, Defining Customers

**Context:** You may not need to perform this step if you have already installed and set up Oracle Receivables or performed a common-applications setup.

### **Step 13.4 Define Customer Sites**

**Default:** None

Required if you price, give benefits or charge by Customer Site.

See: Oracle Receivables, Defining Customer Sites

**Context:** You may not need to perform this step if you have already installed and set up Oracle Receivables or performed a common-applications setup.

## **Step 14. Order Types**

**Default:** None

Required if you price, give benefits or charge by Order Type.

See: Oracle Order Management, Defining Order Types

**Context:** You may not need to perform this step if you have already installed and set up Oracle Order Management or performed a common-applications setup.

## **Step 15. Line Types**

**Default:** None

Required if you price, give benefits, or charge by Order Line Type.

See: Oracle Order Management, Defining Order Line Types

**Context:** You may not need to perform this step if you have already installed and set up Oracle Order Management or performed a common-applications setup.

## **Step 16. Freight Terms**

**Default:** None

Required if you price, give benefits, including upgrading Freight Terms, or charge by Freight Terms.

See: Oracle Order Management, Defining Freight Terms

**Context:** You may not need to perform this step if you have already installed and set up Oracle Order Management or performed a common-applications setup.

## **Step 17. Freight Cost Types**

**Default:** None

Required if you price, give benefits or calculate charges using Freight Cost Types.

See: Oracle Order Management, Freight Cost Types

**Context:** You may not need to perform this step if you have already installed and set up Oracle Receivables or performed a common-applications setup.

## Step 18. Payment Terms

**Default:** None

Required if you price, give benefits (including upgrading Payment Terms), or charge by Payment Terms.

See: Oracle Receivables, Defining Payment Terms.

**Context:** You may not need to perform this step if you have already installed and set up Oracle Receivables or performed a common-applications setup.

## Step 19. Enable Currencies

**Default:** All major currencies predefined with Oracle Applications

This is a task for your System Administrator. The codes used are the ISO standard codes for currencies. However, you must enable the specific currencies you want to use on your price and modifier lists.

See: Oracle General Ledger, Currencies.

**Context:** You may not need to perform this step if you have already installed and set up Oracle General Ledger or performed a common-applications setup.

## Step 20. System Sourcing

**Default:** Predefined Oracle Pricing record.

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---

**Warning:** Please note that changes in system source code - Request type mapping can affect the behavior of pricing engine severely if done improperly.

---

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This step is required if either of the following exists:

- Your pricing data application source is anything other than Oracle Pricing
- You are integrating Oracle Pricing with an application other than Oracle Order Management.

The pricing engine uses the request type to source system mapping you define to determine the source or sources of pricing data that should be used to price a particular type of transaction. The request type is used to identify the type of transaction being priced, e.g. a contract. Whenever the pricing engine prices a request the request must be stamped with the request type so the pricing engine can identify the type of transaction. The source system is recorded on all price and modifier lists and is used to identify which application created this pricing data, e.g. iMarketing.

Use the Source System mapping form to control which pricing data is used to price which type of transactions.

---

---

**Note:** When pricing a contract, look at price and modifier Lists created by the contracts application. In this case the Request Type Contract would be mapped to the Source System Oracle Contracts.

When pricing an order, look at pricing data created through Oracle Pricing and my legacy system System XYZ. In this case the Request Type ONT: Oracle Order Management would be mapped to Source

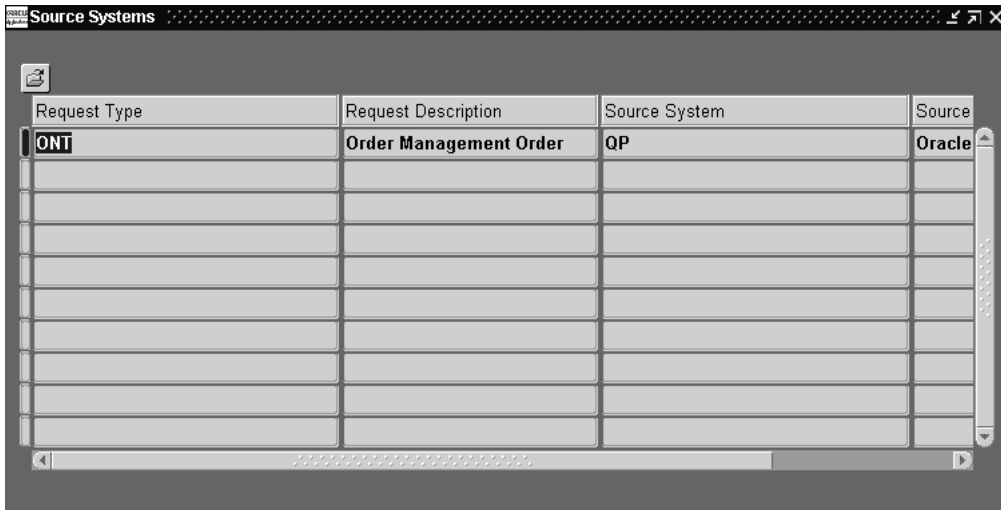
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**Context:** You need to perform this step for each Source System you wish to map to a Request Type.

## » To define a new Source System mapping:

**Figure 2–5 Source Systems**



Request Type	Request Description	Source System	Source
ONT	Order Management Order	QP	Oracle

1. Navigate to the Source Systems window.
2. In the Request Type field, select a previously defined Request Type.
3. In the Source Systems field, select a previously defined Source System code.
4. Save your work.

## Step 21. Event Phases

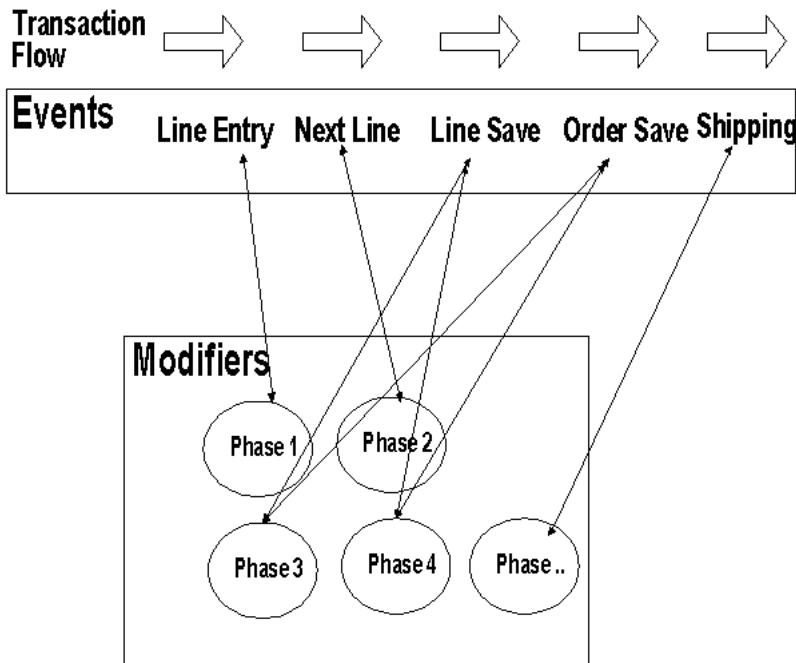
**Default:** Seeded Oracle Pricing Phases

This step is required if you need to create additional pricing phases or change the seeded pricing phases. You may wish to do this if for example the way your business manages pricing requires certain types of benefits etc. to be applied at a particular point or event in the transaction process flow or, for example, the method of resolving incompatibility for a seeded phase is not according to your business pricing policies.

Pricing Events and Pricing Phases allow you to configure pricing to price your transaction *when* your application process flow requires pricing to occur, and define *what* specific pricing data should be considered for application to the request at that point in your transaction process flow. Effectively you can break up the pricing of your transaction rather than having to price the whole transaction at once.

A pricing event is a point in the lifecycle of your transaction at which you wish to price the transaction, or certain transaction lines, and/or apply price adjustments, benefits or charges to the whole transaction or specific transaction lines.

**Figure 2–6 Phase Events overview**



A pricing phase controls what modifiers are considered by the search engine and in what sequence they should be applied to the request. The attributes of a pricing phase allow you to control which modifiers can be placed in a phase. When you assign a modifier to a pricing phase, (see Modifiers Chapter) the Modifier Setup form matches the attributes of the modifier to the attributes of the available pricing phases to validate which pricing phase or phases a modifier can be placed in. A Modifier can only be assigned to one Phase.

---

---

**Note:** All Price Lists are automatically placed in the seeded Phase 0. List Line Base Price and cannot be assigned to any other Phase.

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Oracle pricing includes some seeded pricing phases and events that have been designed to price an order in Oracle Order Management. The following describes some of the Event - Phase Mapping to illustrate the Pricing Event - Phase concept.

A number of pricing events have been predefined in Oracle Pricing to price an order when it is entered on-line.

**1. Fetch List Price**

The pricing engine is called to display the base price for an order line as the user enters the item and quantity on the line. This event is only mapped to Phase 0: List Line Base Price. Hence, the pricing engine only returns the base price for the line.

**2. Enter Order Line**

The pricing engine is called to apply line level modifiers as the user completes the entry of an order line.

At this stage in the order entry process, each order line is being priced and discounted individually without consideration for other lines entered on the order. Therefore, to increase performance processing, the pricing engine will not look at modifiers or charges which are qualified by other lines on the order. Hence, any phases mapped to this event should include line level modifiers only. To ensure that this is the case, the level on the seeded phases mapped to this event, have been set to Line.

**3. Save Order**

As the order is saved, all lines on the transaction should be priced together so that, for example, quantities on order lines which give rise to a discount on another order line may be considered, and also, header level adjustments may be applied.

This event has been mapped to Phase 30: All Lines Adjustments. Phase 30 has been seeded to include all modifier types which can consider related order lines as qualification for a discount.

- Modifier Type - Other Item Discount
- Modifier Type - Promotional Goods
- Modifier Type - Price Break

or consider volumes across the order for qualification.

- Modifier Level - Linegroup

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---

**Note:** These types of Modifiers should always be placed in a phase that is executed when the *whole* transaction is being priced rather than individual lines on the transaction, otherwise related lines and additional volumes will not be considered and hence the discount may not be given.

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---

All header level adjustments and benefits should also be applied to the order at this point. Hence, Phase 40: Header Level Adjustments has been included in this pricing event. This has been seeded with a level of Order to ensure that only Order Level modifiers are assigned to this phase. Similarly, header level charges are also applied to the order at this point. Therefore this event has been mapped to Phase 70: Header Level Charges. This phase has been seeded with a level HEADER and a List Type of Charges so that only modifiers on a Charge List can be included in this phase.

4. Enter Shipments:

As the order shipments are created the pricing engine is called to apply any freight or special charges to the order which have been setup to use the actual shipping costs as a basis for calculating freight. This event is mapped to 50: Line level Charges.

5. Batch Event:

As well as on-line pricing events, a pricing event has been created to price an order when it is processed in batch. In this case the entire order is priced at once.

The batch event is mapped to all of the pricing phases that are executed during on-line entry of an order, but all phases are executed in one event as there is no need to consider the user interface.

6. Reprice Lines:

REPRICE\_LINE is an event which user can plug into the work flow activity in Oracle Order Management. It has been seeded in Oracle Advanced Pricing to take place after the order is shipped, but before the order is invoiced. This event is going to take place after the SHIP event. A user could set this up to run any time during the workflow. This event always passes just one order line that is being worked on to the engine. That means any order level/line group kind of discounts can not be given in this event.

---

---

**Note:** if you create any new pricing phases you should assign these to the appropriate on line pricing event *and* the batch event otherwise orders entered on line could be priced differently to those entered in batch.

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## » To enter new event phases:

**Figure 2–7 Event Phases**

Pricing Event	Description	Start Date	End Date	Search Flag
PRICE	Fetch List Price			No
LINE	Enter Order Line			Yes
BATCH	Batch Processing			No

1. Navigate to the Event Phases window.
2. In the Sequence field, enter a *required* phase number. This number is used by the pricing engine to determine the order of execution of the phases when there are multiple phases in an event.
3. In the Name field, enter a required name for the phase. The name is displayed to the user in the Modifier Setup Form when assigning a modifier to a phase. Generally it should describe the timing and contents of the phase. For more information on modifiers, see Oracle Pricing, Modifiers Chapter.
4. In the Level field enter an *optional* modifier level. If you wish to restrict the modifiers in a particular phase to modifiers of a particular modifier level; e.g. Line, Linegroup, or Order, then enter the level here.
5. In the List Type field, enter an *optional* list type. If you wish to restrict the modifiers in a phase to modifiers on a particular modifier list, e.g. Discount, Charges, Promotion, etc., then enter the List Type here.

6. Freeze Override Flag

This flag is used to provide additional control over freezing lines on your transaction. When pricing a request, it is possible to flag your transaction lines as follows:

- **Y** - Calculate Price, i.e. apply all prices and modifiers to the request line
- **N** - Freeze Price, i.e. do not apply any prices or modifiers to the request line
- **P** - Partial Price, i.e. only apply price or modifiers in certain phases

If the Calculate Price on the request line is set to P, the pricing engine looks at this Freeze Override Flag on the Phase. If it is checked then the pricing engine will apply eligible modifiers in this phase to the request line, if not then modifiers in this phase will not be considered for application to the request line.

This flag can be updated even on seeded pricing phases.

7. In the Incompat Resolve Code, select a *required* value. This is the method which will be used for this pricing phase to determine which modifier should be selected when multiple modifiers in the same exclusivity or incompatibility group are eligible to be applied to the same pricing request line.

- **Best Price:** The modifier which gives the lowest price (most advantageous) to the customer on the given pricing request line will be applied.
- **Precedence:** The modifier with the lowest precedence, i.e. the most specific, on the given pricing request line will be applied

This value can be updated even on seeded pricing phases.

8. In the Pricing Event field, select a *required* value for the pricing event you are linking to phase. Multiple pricing events may be entered for a single phase. Valid values are (pricing event lookup):

- Batch
- Book
- Order
- Line
- Price
- Ship

9. In the Start Date field, enter a *optional* date on which you wish the event to start using the pricing phase.

**10.** In the End Date field, enter a *optional* on which you wish the event to stop using the pricing phase.

**11. Search Flag**

This flag is used by the pricing engine to decide whether for this event and this phase in this event, the search engine should perform a search for price or modifier lists in addition to any that the calling application has requested. This should only be set to No when the calling application already knows which price and modifier lists it wishes to use to price the request. In this case the pricing engine will simply use the Lists that are passed and not try to find any other Lists.

**Example:** A number of discounts have been negotiated and recorded on the customer's service contract. Hence, when applying discounts to the service order, the application already knows which discount list should be used to price the order.

---

---

**Note:** This feature can be used to enhance the performance of the pricing engine in cases as described above. It should only be set to No in these circumstances, in all other cases the Search Flag should be Yes. Setting this flag to No if your calling application does not pass all required pricing information will mean that prices and modifiers may not be applied to the transaction.

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**Context:** You need to perform this step for each new Pricing Phase you want to add.

## **Step 22.Profile Options**

See: Setting up Oracle Pricing, Profile Options.

## Profile Options

During implementation, you set a value for each user profile option to specify how Oracle Pricing controls access to and processes data.

Generally, the system administrator sets and updates profile values.

See: Oracle Applications System Administrator's Guide, setting User Profile Options

### Setup Profile Options Summary

The table below indicates whether you (the User) can view or update the profile option and at which System Administrator levels the profile options can be updated: User, Responsibility, Application, or Site levels.

A required profile option requires you to provide a value.

An optional profile option already provides a default value, so you only need to change it if you do not want to accept the default.

Profile Option	User	System Administrator				Requirements	
	User	User	Resp	App	Site	Required	Default Value
QP: Accrual UOM Class	-	0	0	n	n	Optional	No Default
QP: Blind Discount Option	-	0	0	n	n	Required	Yes
QP: Cross Order Volume Period 1	-				n	Required	No Default
QP: Cross Order Volume Period 2	-				n	Required	No Default
QP: Cross Order Volume Period 3	-				n	Required	No Default
QP: Get Custom Price Customized	0	0	0	0	n	Required	No
QP: Line Volume UOM Code	-	0	0	n	n	Optional	No Default
QP: Line Weight UOM Code	-	0	0	n	n	Optional	No
QP: Negative Pricing	-	0	0	n	n	Required	No Default
QP: Item Validation Organization	-	0	n	0	n	Required	No Default
QP: Return Manual Discounts	n	n	n	n	n	Optional	Yes
QP: Source System Code	0	0	0	n	n	Required	No Default
<b>Key</b>	n	You can update the profile option.					
	-	You can view the profile option value but you cannot change it.					
	0	You cannot view or change the profile option value.					

Profile Option	User	System Administrator				Requirements	
	User	User	Resp	App	Site	Required	Default Value
QP: Unit Price Precision Type	0	0	0	n	n	Required	Standard
QP: Valueset Lookup Filter	n	n	n	n	n	Optional	Yes
QP: Verify GSA	0	0	0	0	n	Required	No
<b>Key</b>	n	You can update the profile option.					
	-	You can view the profile option value but you cannot change it.					
	0	You cannot view or change the profile option value.					

### QP: Accrual UOM Class

Default Value: None

This is required if you business gives non-monetary accruals as benefits.

Specifies the unit of measure class to be used for defining accrual units of measure. The Modifier Setup window displays all units of measure in this class when entering the Benefit UOM for an accrual.

#### Values

All UOM classes defined to Oracle Applications

This profile option is visible and updateable at the site and application levels.

### QP: Blind Discount Option

Default Value: Yes

The default value for this profile option should only be changed if you never define blind discounts.

Used for tuning purposes. If you never define blind discounts, set this profile option to No to bypass part of the search engine processing. A blind discount is a modifier that has:

- No List Qualifiers on the Modifier List Header *and*
- No Line Qualifiers on the Modifier *and*
- No Products or Pricing Attributes

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**Note:** If your business needs to define a Modifier as described above, make sure that this profile option is set to Yes otherwise these Modifiers will not be selected by the Search Engine

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**Values****Yes**

Blind Discounts are enabled.

**No**

Blind Discounts are disabled, i.e. Bypass Blind Discount processing in Search Engine.

This profile option is visible and updateable at the site and application levels.

**QP: Cross Order Volume Period 1**

Default Value: None

This is required if you will be running the cross order volume load program. This defines the number of days of order lines that the load program will accumulate and total. This value must not be the same as the value in QP: Cross Order Volume Period 2 or QP: Cross Order Volume Period 3.

**Value**

This value is always expressed in days.

This profile option is visible and updateable at the site and application level.

**QP: Cross Order Volume Period 2**

Default Value: None

This is required if you will be running the cross order volume load program. This defines the number of days of order lines that the load program will accumulate and total. This value must not be the same as the value in QP: Cross Order Volume Period 1 or QP: Cross Order Volume Period 3.

**Value**

This value is always expressed in days.

This profile option is visible and updateable at the site level.

**QP: Cross Order Volume Period 3**

Default Value: None

This is required if you will be running the cross order volume load program. This defines the number of days of order lines that the load program will accumulate and total. This value

must not be the same as the value in QP: Cross Order Volume Period 1 or QP: Cross Order Volume Period 2.

### **Value**

This value is always expressed in days.

This profile option is visible and updateable at the site level.

### **QP: Get Custom Price Customized**

Default Value: No

Indicates if, when processing formulas, the pricing engine evaluates the line type Function. If your organization wants to use this formula line type, you need to:

- Customize the `GET_CUSTOM_PRICE` function
- Set this profile option to Yes.

If the pricing engine evaluates custom code within the `GET_CUSTOM_PRICE` function and the profile option is No, the formula calculation fails, and the calling application processes the failure.

### **Values**

#### **Yes**

When processing formulas, the pricing engine evaluates the line type Function.

#### **No**

When processing formulas, the pricing engine does not evaluate the line type Function.

This profile option is updateable at the site level only.

### **QP: Line Volume UOM Code**

Default Value: None

This is required if your business needs to define qualifier rules which include the seeded qualifier Line Volume

Specifies the unit of measure of the Line Volume Qualifier. The attribute sourcing API converts the item on the Request Line to its primary UOM, and then uses the volume attributes of the item to derive the Line Volume of the item in the UOM specified in this profile option.

### **Values**

All units of measure currently defined to Oracle.

This profile option is visible and updateable at the site and application levels.

### **QP: Line Weight UOM Code**

Default Value: None

This is required if your business needs to define qualifier rules which include the seeded qualifier Line Weight.

Specifies the unit of measure of the Line Weight Qualifier. The attribute sourcing api converts the item on the Request Line to its primary UOM, and then uses the weight attributes of the item to derive the Line Weight of the item in the UOM specified in this profile option.

#### **Values**

All units of measure currently defined to Oracle.

This profile option is visible and updateable at the site and application levels.

### **QP: Negative Pricing**

Default Value: No

The default value should only be changed if your business needs to define a negative price on a price list line. Controls whether a negative price can be entered in the Price List Setup U.I.

#### **Values**

##### **Yes**

Allow a negative price to be entered.

##### **No**

Do not allow a negative price to be entered.

This profile option is visible and updateable at the site and application levels.

### **QP: Item Validation Organization**

Default Value: None

Set this to an organization at the level in your organization hierarchy at which you set prices for items.

Indicates the Oracle Manufacturing organization that items are validated and viewed against when entering items in the Price List or Modifier windows.

Set the QP: Item Validation Organization profile, by site or responsibility, to an organization at the level in your organization hierarchy at which you set prices for items.

**Values**

All inventory master organizations currently defined to Oracle

This profile option is visible and updateable at the site and responsibility levels.

**QP: Return Manual Discounts**

Default Value: Yes

Indicates how the pricing engine should perform incompatibility processing for manual discounts.

**Values****Yes**

All the manual discounts will be returned.

All the automatic discounts that get deleted as part of incompatibility processing will be returned as manual discounts.

**No**

All automatic and manual discounts will go through incompatibility processing and one of them in each incompatibility group will be returned. In this process an automatic discount might get deleted and a manual discount might get selected.

Discounts (automatic or manual) deleted as part of incompatibility processing will not be returned as manual discounts.

This profile option is visible and updateable at the site, application, responsibility, and user levels.

**QP: Source System Code**

Default Value: QP: Oracle Pricing

The default value should only be changed if the source of the pricing data is any application other than Oracle Pricing. Set this to the Source System Lookup Code of the application which is interfacing the pricing data

Used in all setup windows to identify the application through which the pricing information is being entered. This Source System code is held on all Price and Modifier Lists to identify the origin of the data. At the time of pricing, the pricing engine may restrict its search to pricing information which originated from a particular application depending on the Request Type to Source System Setup.

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**Note:** Set the QP: Source System Code Profile to the Source System Lookup Code of the application from which the QP Setup or other application setup U.Is are being called

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### Values

QP:Oracle Pricing

This profile option is updateable at the site and responsibility levels.

### QP: Unit Price Precision Type

Default Value: Standard

This profile option change a the default value if you need to round to the currencies extended precision.

Used to determine the value for the rounding factor which is defaulted on the Price List. The rounding factor is limited by the number of positions allowed in the standard or extended precision format of the price list currency.

**Values****Extended**

Rounding Factor is defaulted to the currencies extended precision

**Standard**

Rounding Factor is defaulted to the currencies standard precision

This profile option is updateable at the site and application levels.

**QP: Valueset Lookup Filter**

Default Value: Yes

Use this profile option to enable or disable a search criteria window for qualifier value lookups in qualifiers, price lists, and modifiers. Some qualifiers use large valuesets, for example, those based on all customers, and searches may take a long time. If you want to reduce the number of items that display in the list of values, you can enter search criteria. If you do not enter search criteria and click the list of values indicator for the fields Value From or Value To, you see a window which advises that you have not entered search criteria and that the search may take a long time.

**Values****Yes**

The message displays.

**No**

The message does not display. Use this value if you do not expect to have large qualifier valuesets and do not need to enter search criteria to reduce the display.

This profile option is visible and updateable at the site, application, responsibility, and user levels.

**QP: Verify GSA**

Default Value: No

Change the default value to Yes if your business requires GSA pricing functionality

Indicates whether the pricing calculation engine should test for GSA violations. The evaluation is performed if a request is for a non-GSA customer, and GSA rules are violated if the selling price of an item is calculated to be less than the price of the item on any GSA price list.

### **Values**

#### **Yes**

Pricing Calculation engine tests for GSA violations, any violating request lines are returned to the calling application with a status of GSA violation.

#### **No**

Do not test for GSA violations.

This profile option is updateable at the site level.

---

---

## Creating Pricing Qualifier Groups

This chapter describes how to create, query, delete, and modify qualifier groups and provides the basic framework for using qualifiers within qualifier groups. Qualifier groups are created using previously setup qualifier contexts and attributes.

Oracle provides basic seeded qualifier contexts and attributes. Qualifier values for these predefined attributes are sourced from the Oracle Application database whenever applicable. See Appendix B.

You can also choose to setup qualifier context/attributes to suite your own business needs to determine eligibility for benefits or price. See Setting Up Oracle Pricing; Qualifiers Section.

The following topics are included:

- Overview of Oracle Pricing Qualifiers on page 3-2
- Creating a Qualifier Group on page 3-5
- Querying a Qualifier Group on page 3-9
- Modifying or Deleting Qualifier Groups on page 3-10
- Using Qualifiers with Price Lists on page 3-10
- Using Qualifiers with Modifiers on page 3-10

## Overview of Oracle Pricing Qualifiers

Oracle Pricing lets you define qualifiers. Qualifiers determine the who part of eligibility. Qualifiers and qualifier groups can then be linked to Oracle Price Lists and Oracle Modifiers to define concise rules governing who can receive a particular price, discount, promotion or benefit.

### Qualifier Terms

#### Qualifier Contexts

Qualifier contexts are referred to as flattened hierarchies and are a way of grouping similar qualifying attributes in the qualifier flexfield and indicating the specificity by the flexfield sequence (precedence).

#### Qualifiers

Qualifiers are specific attributes that assist Oracle Pricing with limiting the who for benefit or price eligibility

#### Qualifier Value

A qualifier value is a value you chose to associate a qualifier attribute.

### Using Qualifiers

Table 3.1 illustrates the various levels of where qualifiers or qualifier groups can be associated with Oracle Price Lists and Modifiers.

**Table 3–1 Qualifier Associations**

<b>Functional Area</b>	<b>Association Level</b>
Price List	Price List
Modifier	Modifier List, Modifier List Line

There are various methods qualifiers can be associated with Price Lists or Modifiers:

1. Create qualifier groups using qualifier groups form and then attach the qualifier group to the price list, modifier list, or modifier list line.
2. Create qualifier(s), and then attach individual qualifiers within the Price List or Modifiers screen.
3. Any combination of method 1 and 2

Once a particular entity has qualified for a particular benefit, Oracle Pricing Attributes can then assist in further refining exactly which benefits can be given.

You can create, modify, query, and delete qualifier groups.

In order to take advantage of Qualifier functionality, Oracle has predefined basic qualifier contexts and associated qualifier attributes that use Oracle Application database tables as the data source wherever applicable. Table 3.2 illustrates several predefined structures that can be used in determining benefit eligibility.

**Table 3–2 Predefined Qualifier hierarchy structures**

Qualifier Context	Qualifier Attributes
Customer	Customer Name, Bill To, Sales Channel
Order	Order Type, Shipment Date, Line Type
Terms	Payment Term, Freight Terms, Shipping Terms
Volume	Order Amount, Line Volume

Order Amount as a qualifier refers to the sum of the list prices on all active order lines. It is not the same as Order Total in Oracle Order Management which can include the effect of modifiers.

You can set up hierarchies in flattened format using qualifier contexts and attributes. Flattened format is required as qualifiers do not store any relationships among the hierarchies. Table 3.3 illustrates a hierarchy with 3 different levels of qualifier attributes. This hierarchy can be stored by creating a context such as “*Geography*”. Under this context, you would define 3 attributes, such as State, Territory, and Customers.

**Table 3–3 Example qualifier “Geography” Context**

Qualifier Attribute	Qualifier attribute Value
State	CA, MN,WA,NY,FL
Territory	East, West, South, North
Customers	all customers, subset of customers by purchase volume

To allow the user to chose and enter correct values for the 3 attributes, you would have to define specific validation sets for each attribute, using value set definitions to provide the correct source.

For more information on setting up qualifier contexts, qualifier attributes, and attribute values, please refer to Setting up Oracle Pricing; Qualifiers Section.

For more information on Value Sets, please refer to Oracle Applications Flexfields Users Guide, Planning and Defining Values and Value Sets

Since hierarchical relationships are not stored, you need to define the sourcing information. This is required because when the pricing engine has to make a determination as to whether a particular customer can receive a particular benefit, the engine needs to know the information at all the levels of hierarchy.

In the above hierarchy, if the qualifying conditions established were that *Territory* must be West and *State* must be California, then the pricing engine would need to know both the *Territory* and the *State* of the customer in order to determine eligibility. If the qualifying conditions established were that *Territory* must be West or *State* must be California, then the pricing engine would need to know only the *Territory* or the *State* of the customer in order to determine eligibility.

For more information on qualifier sourcing, please refer to Oracle Pricing; Default Attribute Sourcing Rules Chapter.

### Qualifier Groups

You can group qualifiers to create AND and OR conditions using a grouping number, as follows:

- To create an AND condition, create qualifiers in the same qualifier group.
- To create an OR condition, create qualifiers in different qualifier groups.

For example, if you offer a 10% discount on each order placed by preferred customers who spend more than 150 currency units, define the qualifying condition as follows:

**Table 3-4 AND qualifying condition**

Qualifier Group	Qualifier Attribute	Operator	Value From	Value To
1	Customer Class	=	Preferred	-
1	Order Amount	Between	150	Null

If you offer a 10% discount on each order placed by a preferred customer or each order in which the customer spends more than 150 currency units, define the qualifying condition as follows:

**Table 3-5 OR qualifying condition**

Qualifier Group	Qualifier Attribute	Operator	Value From	Value To
1	Customer Class	=	Preferred	-

**Table 3–5 OR qualifying condition**

Qualifier Group	Qualifier Attribute	Operator	Value From	Value To
2	Order Amount	Between	150	Null

**Note:** You can specify more than one qualifier in each qualifier group.

If you offer a discount in which a qualifier is mandatory for all qualifying conditions, you can include it in all other qualifier groups by placing it in the null qualifier group. The search engine processes null qualifying conditions first and it only processes other qualifier groups if the pricing request qualifies for the null qualifying conditions.

For example, you offer a 10% discount on each order placed by a preferred customer or each order in which a customer ordering from a United Kingdom web site spends more than 150 currency units. However, the customer must use a VISA credit card to pay. Define the qualifying condition as follows:

**Table 3–6 NULL qualifying condition**

Qualifier Group	Qualifier Attribute	Operator	Value From	Value To
Null	Credit Card Type	=	VISA	-
1	Customer Class	=	Preferred	-
2	Order Amount	Between	150	Null
2	Website Domain	=	co.uk	-

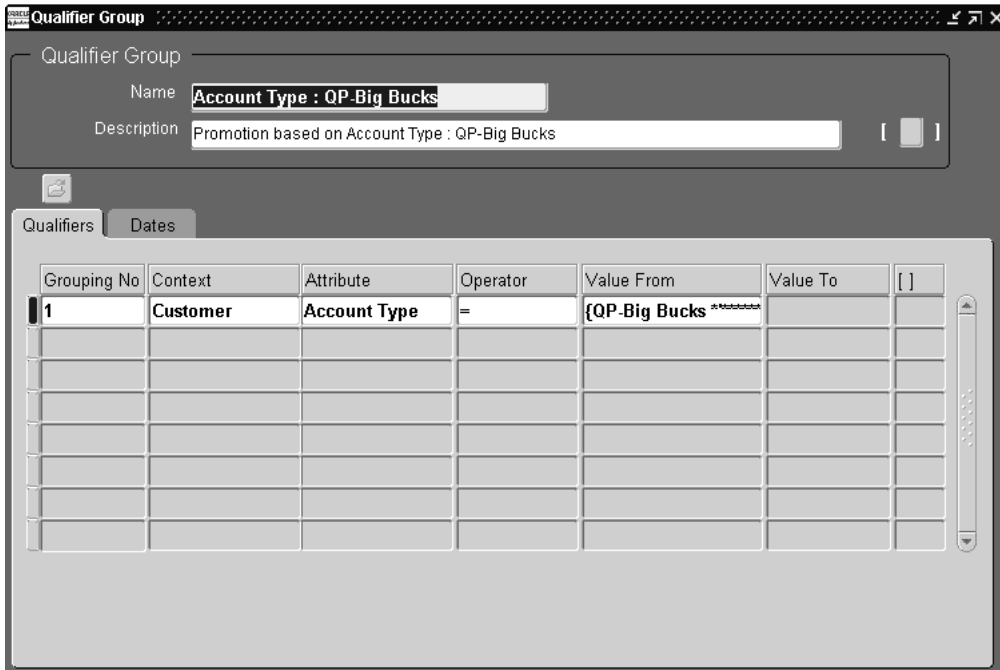
## Creating a Qualifier Group

The Qualifier Group window lets you create a new qualifier group and its associated qualifiers. An example of a qualifier group could be: Customer must be in territory *WEST* and Order Amount is between \$2000 and \$5000 or Order Quantity must be greater than 10,000. The Qualifier Group can use seeded qualifiers (source attributes) such as Customer Name and Order Amount or your own qualifier attributes. These qualifiers could come from one or more qualifier contexts.

### ►► To add a new qualifier group:

1. Navigate to the Qualifier Group window.

**Figure 3–1 Qualifier Groups**



The qualifier Groups window appears.

2. In the Name field enter the name of the qualifier group.
3. In the Description field enter an *optional* description of the qualifier group.
4. In the Qualifiers tab region, enter the group number in the Grouping No. field.

---

**Note:** When entering the same numeric value for multiple qualifiers within a group in the Grouping No. field, this simulates an “AND” condition.

- You must enter the EXACT values for Start Date and End date for EACH qualifier with a qualifier group when simulating an “AND” condition. If different dates are entered in either field, then the entire qualifier grouping will be ignored by the pricing engine

When entering different numeric values for multiple qualifiers within a group in the Grouping No. field, this simulates an “OR” condition.

---

5. In the Context field select a qualifier context. The LOV will display all enabled descriptive flexfield context values defined for the Qualifier Contexts.
6. In the attribute field select a qualifying attribute of the context chosen in step 5. The LOV will display all enabled descriptive flexfield context specific segment values for context structure chosen.
7. In the Operator field select a value. Valid options are Equals (=): NOT Equals (NOT =): and Between (BETWEEN).

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**Note:** Between operator serves as Between condition when Value from and Value to field both contain a value.

- To simulate a Greater Than condition, enter a value in the Value From field, and leave Value To field blank.
  - To simulate a Less Than condition, enter a value in the Value To field, and leave Value From field blank.
- 
- 

8. Enter Value From and Value To. The LOV will display the values based on the value set definition of the qualifier attribute chosen.

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**Note:** Some qualifiers use large valusets, for example, those based on all customers. For the Value From and Value To fields, if you want to reduce the number of items that display in the list of values:

- Enter search criteria in the field
- Click the list of values indicator

If you do not enter search criteria and click the list of values indicator, you see a window which advises that you have not entered search criteria and that the search may take a long time:

- If you want to see a reduced list of values display, click No, enter search criteria, and click the list of values indicator
- If you want to see the entire list of values display, click Yes.
- If you do not want to see the list of values, click Cancel.

Set the profile option QP: Valueset Lookup Filter to avoid this message.

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9. In the Start Date field, enter an *optional* date that the qualifier becomes active

10. In the End Date field, enter an *optional* date that the qualifier becomes inactive

11. Save your work.

**Example:**

Customer must be in territory *WEST* and Order Amount is between \$2000 and \$5000 or Order Type must be Standard.

Create a qualifier group, for example West1. Table 3-4 demonstrates field values to define the qualifier group West1.

**Table 3-7 Example qualifier context “West1”**

Grouping No.	Context	Attribute	Operator	Value From	Value To
1	Geography	Territory	=	West	
1	Volume	Order Amount	Between	2000	5000
2	Order	Order Type	=	Standard	

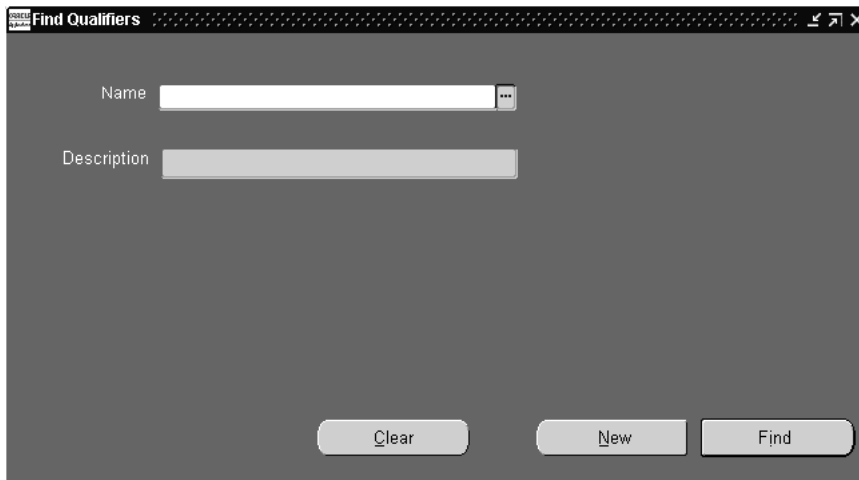
## Querying a Qualifier Group

The Find window lets you query for a specific qualifier group or define a new qualifier groups.

### ►► To query for a qualifier group

1. Navigate to the Qualifiers window.

*Figure 3–2 Find Qualifier Group*



The Find Qualifiers window appears.

2. Choose Find on the toolbar or from the View menu, select Find.

The Find window appears.

3. Select the value for the qualifier group name you wish to find.
4. Choose Find.

The Qualifiers window appears.

## Modifying or Deleting Qualifier Groups

The Qualifiers window lets you modify (update or delete) a qualifier group or an associated qualifier.

### ►► To modify a qualifier group and qualifiers

1. Navigate to the Qualifiers window.
2. Locate the Qualifier Group you wish to modify or delete.
3. Modify or delete the record.

---

---

**Note:** You must first delete all associated qualifiers within a group before you can delete the qualifier group.

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4. Choose Save on the toolbar.

## Using Qualifiers with Price Lists

Qualifiers or qualifier groups can be associated with a particular Price List, or Price List Line. For more information on attaching a qualifier or qualifier group to a price list, see Oracle Pricing, Price ListsChapter.

## Using Qualifiers with Modifiers

Qualifiers or qualifier groups can be associated with a particular Modifier List or Modifier list line. For more information on attaching a qualifier or qualifier group to modifiers and modifiers list line lists see Oracle Pricing, Modifiers Chapter.

# 4

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## Modifiers

This chapter describes modifiers and includes the following topics:

- Overview of Modifiers on page 4-2.
- Creating a Modifier List on page 4-15
- Creating List Level Qualifiers on page 4-17
- Creating Modifier Lines on page 4-21
- Creating Line Level Qualifiers on page 4-40
- Attaching Pricing Attributes on page 4-42
- Excluding Items on page 4-43
- Changing Modifier Incompatibility on page 4-44
- Redeeming Accruals on page 4-47

## Overview of Modifiers

Modifiers enable you to setup price adjustments (for example, discounts and surcharges), benefits (for example, free goods, coupons) and freight and special charges that the pricing engine applies immediately to pricing requests or accrues for later disbursement. Using modifiers, you can:

- Setup a modifier list with multiple modifier lines
- Create eligibility rules for modifiers by assigning list and line level qualifiers
- Define modifiers that are incompatible with other modifiers
- Create exclusive modifiers
- Create cascading modifiers
- Accrue monetary and non-monetary benefits

### Advanced Promotion and Deals

Modifier list types of Promotion and Deal have a parent-child relationship for reporting purposes. When you create a modifier list type of Deal, you must associate it to a parent promotion by providing the promotion name and version. Since this association is for reporting purposes, information that you define on the promotion is independent of and does not affect the information on the Deal.

You can create ask for promotions or deals; those that pricing engine does not apply unless the customer asks for them. At order entry, you must reference the modifier list name or number or the modifier line number.

You can do the following with promotions and deals:

- Create versions to retain history
- Match effectivity dates
- Use multiple modifier types
- Issue coupons
- Offer discounts on other items when a customer purchases one
- Offer promotional goods
- Offer upgraded merchandise
- Substitute favorable payment terms
- Create both monetary and non-monetary promotional accruals

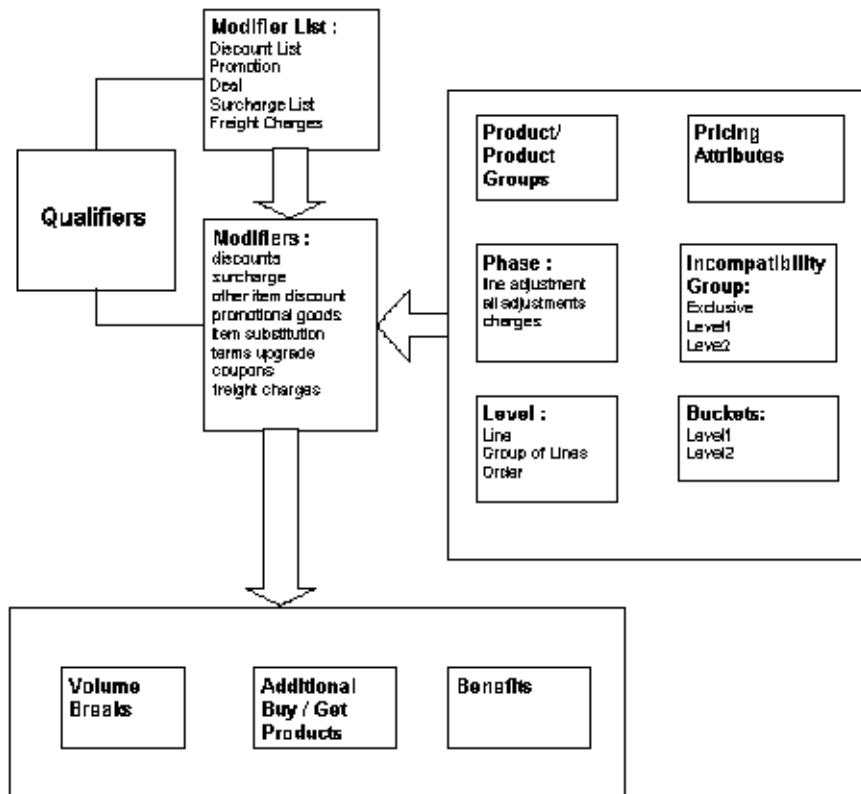
### Modifier Concepts

You use the Define Modifier form to set up price adjustments, benefits, freight and special charges. You can define simple discounts and surcharges as well as more advanced deals and promotions within the same window.

Modifier lists contain one or more modifiers. Modifiers have list level and line level components. Each list level must have one or more lines associated with it.

By defining qualifiers at the list and line levels, you define a customer’s eligibility for the modifier.

**Figure 4–1 Overview of Modifiers**



### Modifier List Types

Using modifier lists, you can create groupings of price adjustments, benefits, and freight and special charges that you offer and report together to meet various business needs. At the list level, you define criteria that is common to all of the line level modifiers. You can use the following list types:

- Discount
- Surcharge
- Freight/Special Charges
- Promotion
- Deal

For each list type that you define, you associate certain line types.

### Modifier Line Types

Use modifier lines to define the type of price adjustments, benefits or freight and special charges that the pricing engine applies to pricing requests. You can associate certain line types with each list type. You can use the following line types:

- Discount: Creates a negative price adjustment.
- Surcharge: Creates a positive price adjustment.
- Freight charge
- Item upgrade: Replaces a specific item ordered with another item for the same price.
- Terms Substitution: Replaces freight charges, shipping charges, and payment terms with typically more favorable charges.
- Other item discount: Gives a price adjustment or benefit to a specified item on an order when the customer orders one or more other items on the same order.
- Promotional goods: Adds a new item with a price adjustment or benefit when the customer orders one or more other items on the same order.
- Coupon issue: Issues a coupon on one order for the customer to redeem for a price adjustment or benefit on a later order.
- Price Break - Applies a variable discount or surcharge price adjustment to a pricing request based meeting the condition of a break type. You can use both point and range type breaks.

**Table 4–1 Modifier List Type and Modifier Line Type Relationships**

<b>Modifier List Types</b>	<b>Discount</b>	<b>Surcharge</b>	<b>Freight &amp; Special</b>	<b>Promotion</b>	<b>Deal</b>
<b>Modifier Line Types</b>					
<b>Discount</b>	X			X	X
<b>Surcharge</b>	X	X		X	X
<b>Freight Charge</b>			X		
<b>Price Break Header</b>	X	X		X	X
<b>Item Upgrade</b>				X	X
<b>Other Item Discount</b>				X	X
<b>Terms Substitution</b>				X	X
<b>Promotional Goods</b>				X	X
<b>Coupon Issue</b>				X	X

### Manual Modifiers

Manual modifiers are modifiers that the pricing engine returns to the calling application instead of applying automatically. The calling application stores the modifiers in a price adjustments table and displays them so that you can choose the adjustments to be applied on an order line.

The following modifier types can be manual:

- Discounts
- Surcharges
- Price break lines
- Freight and special charges

You can set manual modifiers at the order, line, and group of lines levels and make them overridable.

### Incompatibility

Your business needs may require you to use modifiers that you do not want the pricing engine to apply to an order or order line in combination with other modifiers (incompatible modifiers).

You can use incompatibility groups to assign incompatibility levels to modifier lines. When the pricing engine encounters incompatible modifiers, it uses incompatibility processing to resolve the incompatibility.

### Incompatibility Processing

Incompatibility processing occurs when a customer is eligible for more than one modifier and you instruct the pricing engine not to use these modifiers together.

You can assign multiple incompatibility levels to each pricing phase. When you create modifier lines, you assign each modifier to a phase and assign it an incompatibility level.

Since the pricing business rules allow the pricing engine to apply only one modifier for each incompatibility level and phase combination, it must resolve incompatibilities.

### Base Price

During the phase List Line Base Price, if the pricing engine selects more than one eligible price list line in the desired unit of measure, it resolves the incompatibility by picking the price list line having the highest precedence (lowest precedence number) and uses it as the base price of the item.

Use the Event Phases form to set the incompatibility resolve code for a phase.

### Modifiers

During the phases List Line Adjustment, All Line Adjustments, and Header Level Adjustments if the pricing engine selects more than one eligible modifier it resolves the incompatibility using the best price feature. The best price feature instructs the pricing engine to select the modifier that offers the lowest price to the customer. For non-monetary modifiers, the pricing engine uses the estimated general ledger value of the modifier as the value of the modifier.

You can create one exclusive modifier in each pricing phase. When the pricing engine encounters an exclusive modifier, it suspends incompatibility pricing for the phase and applies only the exclusive modifier.

In the example below, the pricing engine uses precedence to resolve incompatibilities:

**Table 4–2 Incompatibility Processing**

Modifier	Incompatibility		Precedence	Engine Applies
	Phase	Level		
10% discount	30	1	260	No
100 currency unit promotion	30	1	240	Yes

**Table 4–2 Incompatibility Processing**

Modifier	Phase	Incompatibility Level	Precedence	Engine Applies
Free promotional good	30	2	260	Yes
50 currency unit lumpsum	30	3	200	Yes
3% discount	30	3	240	No
25 currency unit deal	40	1	260	Yes

---

**Note:** Refer to the phase event mapping discussion to learn how to set phase incompatibility resolution.

---

### Manual Modifiers

To control incompatibility processing for manual modifiers, set a value for the profile option QP: Return Manual Discounts. To view the incompatibility processing options for manual modifiers, refer to the description of the profile option.

### Buckets

To create cascading price adjustments, you can place modifiers into different buckets. When the pricing engine calculates price adjustments, it:

- Calculates percent type modifiers using the previous bucket's subtotal
- Sums all bucket modifier values to create a bucket subtotal

The pricing engine automatically applies order level modifiers and manual modifiers to the null bucket. With the null bucket, the pricing engine:

- Calculates percent discounts using the list price.
- Sums all bucket modifier values to create a bucket subtotal
- Applies the subtotal after the last numbered bucket.

For all other modifiers, you:

- Do not have to assign a bucket
- Can assign the null bucket

For example, when the base list price is 100 currency units, the pricing engine calculates the final selling price of 66.20 as follows:

**Table 4–3 Final Selling Price Calculation**

Bucket	Modifier	Price Adjustment	Bucket Subtotal	Selling Price
				100.00
1	2% discount	(2.00)		
1	5 currency unit discount	(5.00)		
1			(7.00)	93.00
2	5 currency unit discount	(5.00)		
2			(5.00)	88.00
3	2 currency unit surcharge	2.00		
3	10% discount	(8.80)		
3			(6.80)	81.20
Null	5% discount	(5.00)		
Null	10 currency unit discount	(10.00)		
Null			(15.00)	66.20

## Events

Events are points in the process flow of the calling application at which it sends a pricing request to the pricing engine (analogous to a workflow event). The information that the pricing engine returns, for example, base prices, price adjustments, promotions, or freight charges, depends on the pricing phases of the event.

Refer to the pricing lookups information for the details of the predefined pricing events.

For example, if you need to price sales orders at shipment, use the `REPRICE_LINE` event and insert the Reprice Line workflow activity into the order process workflow to invoke the repricing. The pricing engine uses the price list and modifiers that are in effect at order entry to meet booking requirements such as credit check.

## Accruals

You can create monetary and non-monetary accruals, for example, the customer accrues ten airline frequent flyer credits for each item they purchase. The pricing engine uses them in price calculations and passes them to the calling application.

Accruals:

- Do not affect the selling price of an order line
- Do not appear as chargeable items on invoices
- Create an adjustment record in the database

You can:

- Assign expiration dates to accruals
- Mark accruals redeemed
- Use buckets with monetary accruals. Since accruals do not effect the selling price of an order line, the pricing engine does not include them in bucket calculations but uses bucket numbers to determine the price from which to calculate the accrual value. The chart shows a continuation of the bucket calculation with accruals:

**Table 4–4 Accrual Value Calculation**

Bucket	Modifier	Price Adjustment	Bucket Subtotal	Selling Price
				100.00
1		(7.00)		93.00
2		(5.00)		88.00
3		(6.80)		81.20
Null		(15.00)		66.20
1	10% accrual	(10.00)		
1	5% accrual	(5.00)		
2	10% accrual	(9.30)		

## Cross Order Volume

You can provide extra benefits to a customer after they place a certain amount of business with you. The cross order volume feature allows you to create modifiers that are qualified

across an accumulation of orders and applied when a customer meets certain volume levels. It accumulates and sums order amount, item quantity, and item amount across the orders of each customer.

### **Cross Order Volume Profile Options**

To use cross order volumes, set up periods in the following profile options:

- QP: Cross Order Volume Period 1
- QP: Cross Order Volume Period 2
- QP: Cross Order Volume Period 3

Assign a default value to each profile option in unit of measure Days. For example, set the profile options as follows:

- QP: Cross Order Volume Period 1: 30
- QP: Cross Order Volume Period 2: 60
- QP: Cross Order Volume Period 3: 90

### **Cross Order Volume Load**

Execute the concurrent process Cross Order Volume Load. This populates the cross order volume tables. The qualifier and pricing attribute sourcing functions determine the cross order volumes for a customers and customer-item combinations. You can:

To run the process:

- Select the process to execute either for a single operating unit or for all operating units.
- Provide the load effective date; otherwise the process uses the current date. It uses the cross order volume profile options to determine the order lines included in the cross order volumes.

For example:

- Profile option QP: Cross Order Volume Period 1: 30
- Profile option QP: Cross Order Volume Period 2: 60
- Profile option QP: Cross Order Volume Period 3: 90
- Concurrent process Cross Order Volume Load, Effective Date: 31-December
- Cross order period 1: Order lines with request date between 1-December and 31-December

- Cross order period 2: Order lines with request date between 1-November and 31-December-2000
- Cross order period 3: Order lines with request date between 2-October and 31-December-2000

The Cross Order Volume Load concurrent process has been coded so the qualifier and pricing attribute sourcing functions determine the cross order volumes for a customer and customer-item combinations. The Cross Order Volume Load only looks at orders and order lines that are in a status of Booked. The Cross Order Volume Load does not look at returned or cancelled order lines.

The information in the cross order volume tables is only as current as when the last Cross Order Volume Load concurrent process was run. As orders continued to be booked the concurrent process will need to be executed to include this information. Your business processes should dictate how often these tables need to be loaded with more current information.

The pricing engine calculates the Cross Order/Item Amounts using the List Price on the Order Line not the Selling Price, this is consistent with the calculation of all non-Cross Order Amount based Qualifiers/Pricing Attributes.

The cross order loader calculates the order total and item amount in the currency that is in the set of books. For example, if your set of books is in USD (dollars) and you also have orders in Japanese Yen, the Cross Order Amounts are calculated and summed in USD. The value of the order in Japanese Yen is converted to USD by the cross order loader before including the value in the total amount.

When an order is input as Japanese Yen, and the engine is pricing in Japanese Yen, in an Organization where the Set of Books currency was USD, the seeded sourcing APIs for the Cross Order Amount qualifiers convert the total Cross Order Amount in USD to Japanese Yen.

The pricing engine accumulates all Cross Order totals for an Organization, but it does not summarize across Organizations. The pricing engine only takes into account the orders that a customer has placed with each Sales Organization, and does not consider orders that the customer placed with other Sales Organizations. When running the Cross Order Volume Loader, if you specify an organization, it runs the load for that organization; if you leave it null, it will summarize for all organizations for which there are orders (assuming a multi-org install). Even if it is loading for multiple organizations, each summary is still within each organization.

When performing currency conversions in the Cross Order Volume Loader or Sourcing APIs, the engine performs the conversion using the order header currency conversion rate in

Oracle Order Management. If the order header has no currency conversion rate, the pricing engine determines the conversion rate from the rates defined in Oracle General Ledger.

When you have different units of measure (UOM) for orders, the Cross Order Volume Loader converts from the ordered UOM to the Oracle Inventory primary UOM. In the cross order tables, the item quantity is always the primary UOM of the Item. When the pricing engine sources a Cross Order Quantity for an item, the seeded sourcing API converts the Cross Order Item Quantity from the primary UOM to the Ordered UOM and the pricing engine then converts the Cross Order Item Quantity from the Ordered UOM to the Pricing UOM.

If the pricing engine cannot find a UOM conversion rate for an item to convert from the Ordered UOM to the Primary UOM, the engine returns an Error Message in the Cross Order Loader log file. In this case the total Cross Order Quantity for this item will be incorrect.

### **Cross Order Volume Modifiers**

You set up cross order modifiers by using cross order qualifiers or volume attributes.

Seeded cross order qualifiers are:

- Context: Volume
- Qualifier Attributes:
  - PERIOD1\_ORDER\_AMOUNT
  - PERIOD2\_ORDER\_AMOUNT
  - PERIOD3\_ORDER\_AMOUNT

You use this qualifier attribute if you want your modifier to be qualified based on the total order amount for the period specified in the profile option. You can set up these qualifiers at the modifier list level or line level.

For example, set up the modifier with a list level qualifier as follows:

- Context: Volume
- Qualifier Attributes: PERIOD1\_ORDER\_AMOUNT
- Operator: Between
- Value From: 10000
- Value To: 49999

At order entry time, information is sent to the pricing engine. For example, the pricing engine determines if this customer is eligible to receive this modifier. The engine compares the Qualifier attribute value of 10,000 against the total order amount for this

customer in the cross order volume tables. If the total order amount in the cross order volume tables is between 10,000 and 49,999, the order line is eligible to receive the modifier and the pricing engine applies this modifier.

You can use the cross order qualifiers with any modifier list or line type.

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**Note:** .Since the cross order volume load sourcing does not add the current order amount to the Cross Order Amount, you could also use the Cross Order Amount qualifiers to qualify a Price List.

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Seeded cross order item attributes are:

- PERIOD1\_ITEM\_AMOUNT
- PERIOD2\_ITEM\_AMOUNT
- PERIOD3\_ITEM\_AMOUNT
- PERIOD1\_ITEM\_QUANTITY
- PERIOD2\_ITEM\_QUANTITY
- PERIOD3\_ITEM\_QUANTITY

You use the volume attribute if you want your modifier to be applied based on the item amount or item quantity for the period specified in the profile option. This volume attribute is setup on the modifier line in the volume type field. For example:

- Product Attribute: Item Number
- Product Attribute Value: Item A
- Volume Type: Period 1 Item Quantity
- Break Type: Point
- Operator: Between
- UOM: EA
- Value From: 100
- Value To: 999
- Application Method: Percent
- Value: 10

At order entry time, information is sent to pricing engine. The engine determines if this customer is eligible to receive this modifier. The engine compares the volume attribute value of 100 against the total item quantity for this customer-item in the cross order volume tables. If the total item quantity in the cross order volume tables is between 100 and 999, the order line is eligible to receive the modifier and the engine applies this modifier.

There are restrictions by modifier line type with the use of the cross order volume attributes:

- You can use cross order volume attributes with any line type as a single line break.
- You can use cross order volume attributes with modifier line type Price Break, thus you can create multiple level breaks and apply a discount or a surcharge based upon the tier level that is met.

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**Note:** It is critical that the Cross Order Volume Period profile options be setup prior to the cross order qualifier and volume attribute use in setting up modifiers. There is no system validation during modifier setup between the Cross Order Volume Period profile options and the cross order qualifiers and volume attributes. Thus it is possible for a user to define a modifier with the cross order qualifier and volume and this modifier fail and not be applied at order execution. There is not an error message given to the user that notifies of this failure, the modifier just isn't applied.

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### Cross Order Volume Report

Run the Cross Order Volume Report to view the information in the cross order volume tables. The report displays the total order amount, total item amounts and total item quantities for each customer and period.

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**Note:** The cross order volume loader only accumulates orders for items in the Cross Order Item Amount/Quantity Summary that have modifiers using the cross order volume attributes. Similarly the engine only gives total Cross Order summaries if a Cross Order qualifier has been used in a modifier. Therefore it necessary to run the cross order volume concurrent request after you setup any modifiers using either (a) a Cross Order Amount Qualifier that has not been used previously or (b) a Cross Order Item Amount/Quantity Pricing Attribute for an item that has not been used previously. This is to ensure that all items totals are accumulated and loaded into the cross order tables.

---

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## Creating a Modifier List

Use this process to create a modifier list.

### ►► To create a modifier list

1. Navigate to the Define Modifier window.

**Figure 4–2** Define Modifier

The screenshot shows the 'Define Modifier' window with the 'Main' tab selected. The fields are filled with the following information:

- Type: Discount List
- Number: \$100 DISCOUNT
- Active:
- Name: QP-\$100 DISCOUNT FOR STQI
- Version: 1
- Automatic:
- Currency: USD
- Start Date: [Empty]
- Description: [Empty]

Below the fields is a 'List Qualifiers' button. The 'Modifiers Summary' section is active, showing a table with the following data:

Modifier No	Level	Modifier Type	Start Date	End Date	Print On Invoice
1	Order	Discount	01/JAN/1970	01/MAY/1970	<input checked="" type="checkbox"/>
2	Line	Price Break I			<input checked="" type="checkbox"/>
3	Line	Discount			<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

At the bottom of the window are buttons for 'Exclude', 'Pricing Attributes', 'Line Qualifiers', and 'Define Details\*'.

The Define Modifier window appears.

2. In the Main tabbed region, enter the modifier list type in Type.

---

**Note:** Modifier list types of Promotion and Deal have a parent-child relationship for reporting purposes. When you create a modifier list type of Deal, you must associate it to a parent promotion by providing the promotion name and version. Since this association is for reporting purposes, information that you define on the promotion is independent of and does not affect the information on the Deal.

---

3. Enter the modifier list number in Number.
4. Enter the modifier list name in Name.
5. If the modifier list type is Promotion or Deal, enter a version number in Version.
6. Select or clear Active.

---

---

**Note:** The pricing engine looks at this flag before it checks effectivity dates and ignores inactive modifiers. Inactivating expired modifiers helps the pricing engine to perform more effectively. You can query inactive modifier lists.

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7. Select or clear Automatic.

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**Note:** If you select Automatic for a list, all of its lines Automatic defaults to selected.

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8. Enter Currency. The pricing engine applies modifiers to sales orders of the same currency.
9. Enter the start and end date that the modifier lines are effective in Start Date.

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---

**Note:** If you do not enter dates and check Active, the list is effective from the creation date and does not become ineffective.

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10. Enter a description of the modifier list in Description.
11. If the modifier list type is Promotion or Deal, navigate to the Advanced tabbed region.
12. Enter Parent Number and Parent Version to specify the promotion with which this deal is associated.

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---

**Note:** Modifier list types of Promotion and Deal have a parent-child relationship for reporting purposes. When you create a modifier list type of Deal, you must associate it to a parent promotion by providing the promotion name and version. Since this association is for reporting purposes, information that you define on the promotion is independent of and does not affect the information on the Deal.

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13. Select or clear Ask for. Selecting it instructs the pricing engine to apply this modifier only if the customer asks for it. Select Automatic in the Main tabbed region for ask for modifiers.

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**Note:** If the pricing engine selects multiple modifiers to apply to an order line, ask for promotions receive a higher preference than other modifiers.

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14. You can instruct the pricing engine to use modifier lines only on orders that customers place or that you ship within certain dates. To do this, enter values in Date TypeI and Date TypeII and their effectivity dates in Start Date.

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**Note:** You can enter dates outside of the modifier list effectivity dates. If you enter both dates, the sales order must meet both dates to be eligible for the modifier.

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## Creating List Level Qualifiers

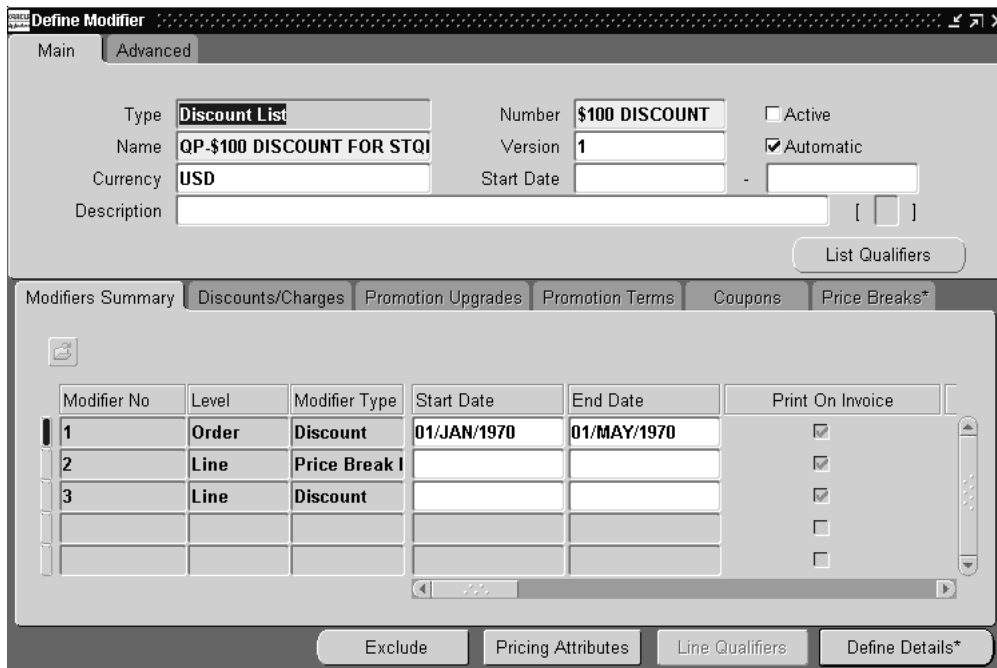
Use this process to create list level qualifiers.

Modifier list level qualifiers help the pricing engine to determine who is eligible for the modifier lines. If an order is not eligible for a modifier list, it is not eligible for that list's line level modifiers even if the lines have qualifiers for which the order is eligible.

### ►► To create list level qualifiers

1. Navigate to the Define Modifier window.

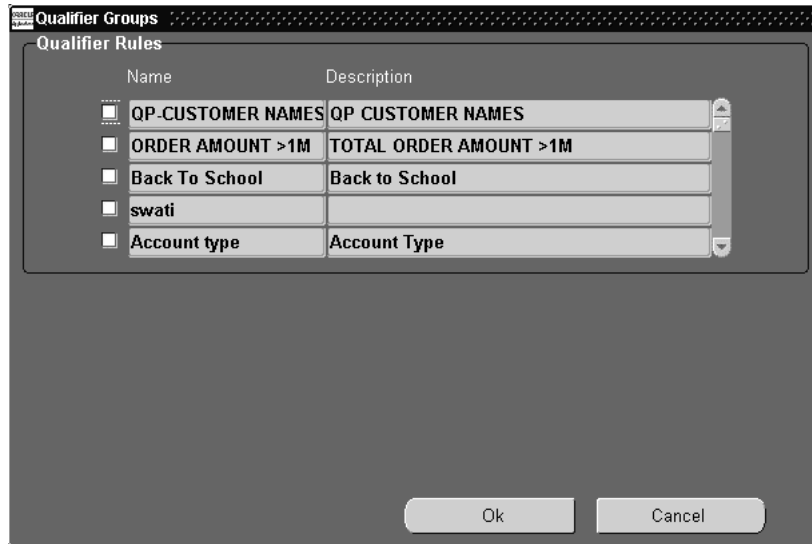
**Figure 4–3 Define Modifier**



The Define Modifier window appears.

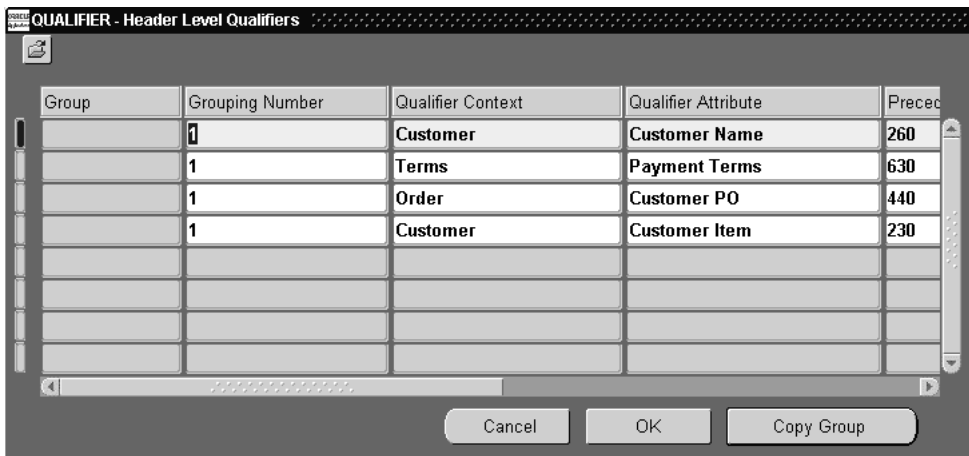
2. Navigate to the Main tabbed region.
3. Select List Qualifiers.

**Figure 4–4 Qualifier Groups**



4. If the Qualifier Groups window appears, this list has no qualifiers. If you desire, select one or more qualifier groups and click OK; otherwise, click Cancel.

**Figure 4–5 QUALIFIER - Header Level Qualifiers**



5. The QUALIFIER window appears. You can add, change, and delete qualifiers; change the grouping numbers, and change the dates.

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**Note:** Some qualifiers use large valusets, for example, those based on all customers. For the Value From and Value To fields, if you want to reduce the number of items that display in the list of values:

- Enter search criteria in the field
- Click the list of values indicator

If you do not enter search criteria and click the list of values indicator, you see a window which advises that you have not entered search criteria and that the search may take a long time:

- If you want to see a reduced list of values display, click No, enter search criteria, and click the list of values indicator
- If you want to see the entire list of values display, click Yes.
- If you do not want to see the list of values, click Cancel.

Set the profile option QP: Valueset Lookup Filter to avoid this message.

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Click Copy Groups to add qualifiers from other qualifier groups. For more information on Qualifiers, see Oracle Pricing, Qualifier Groups.

6. View and, if necessary, adjust precedence numbers in Precedence. They default from the qualifier definition.

The pricing engine uses precedence for resolving incompatibility. If multiple modifiers are eligible within the same phase and incompatibility level, it looks at the precedence on the qualifiers and product attribute and applies the modifier with the lowest precedence.

7. Click OK.
8. Save your work.

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**Note:** The start and end dates of the list qualifiers must be within the start and end date of the modifier list.

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## Creating Modifier Lines

Use this process to create modifier lines.

### ►► To enter basic modifier line information

1. Navigate to the Define Modifier window.

**Figure 4–6** Define Modifier

The screenshot shows the 'Define Modifier' window with the 'Advanced' tab selected. The 'Type' is 'Discount List', 'Number' is '\$100 DISCOUNT', 'Name' is 'QP-\$100 DISCOUNT FOR STQI', 'Version' is '1', and 'Currency' is 'USD'. The 'Active' checkbox is unchecked, and 'Automatic' is checked. Below this is a 'Modifiers Summary' table with the following data:

Modifier No	Level	Modifier Type	Start Date	End Date	Print On Invoice
1	Order	Discount	01/JAN/1970	01/MAY/1970	<input checked="" type="checkbox"/>
2	Line	Price Break I			<input checked="" type="checkbox"/>
3	Line	Discount			<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

At the bottom of the window are buttons for 'Exclude', 'Pricing Attributes', 'Line Qualifiers', and 'Define Details\*'. A 'List Qualifiers' button is also present in the top right area of the main form.

The Define Modifier window appears.

2. In the Modifiers Summary tabbed region, enter a modifier number as an identifier for the modifier line in Modifier No.

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**Note:** This field is mandatory for modifier line type Coupon Issue and for all line types if you select Ask For in the Advanced tabbed region

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### 3. Enter Level:

- Line: The pricing engine determines if the pricing request is eligible for this modifier by validating the request for each line. It applies this modifier at the line level.
- Line group: The pricing engine determines if the pricing request is eligible for this modifier by considering the quantities of a group of lines.
- Order: The pricing engine determines if the pricing request is eligible for this modifier by validating the pricing request header. It applies this modifier at the order level but prorates a percentage value to each line.

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**Note:** If you select Order, you can only select Percent for Application Method.

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### 4. Enter Modifier Type from the following:

- Discount
- Surcharge
- Freight/Special Charges
- Item Upgrades
- Terms Substitution
- Other Item Discount
- Promotional Goods
- Coupon Issue
- Price Break

### 5. Enter the Start Date and End Date of this modifier line.

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**Note:** Start date and end date on the modifier line must be between the start date and end date on the modifier list. The pricing engine uses the modifier line dates to determine if this line is effective.

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### 6. Print On Invoice is reserved for future use.

- ### 7. Select or clear Automatic. If you select it, the pricing engine automatically applies this modifier. If you clear it, someone must manually apply it to an order.

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**Note:** If you select Automatic, Automatic for each line appears as selected but you can change it. You can allow manual application of line types Discount, Surcharge, and Freight/Special Charges.

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8. Select or clear Override. If you select it, you can change the value of this modifier on each order that you enter.
9. Enter the Pricing Phase for this modifier line. Only valid phases for this modifier level appear in the list of values.
10. Enter incompatibility level in Incompatibility Group.
11. Enter Bucket.

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**Note:** For manual discounts, leave Bucket null.

You can define order-level adjustments only in the null bucket so that the pricing engine always applies them to the list prices of the order lines.

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12. Proration Type is reserved for future use.
13. GL Value is reserved for future use.
14. In Product Attribute, select a segment in the item context of the Pricing Context descriptive flexfield, for example, Item, Item Category, or All Items.

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**Note:** Use All Items to define a modifier that applies to all items in your product hierarchy.

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15. Enter the value for the segment, for example, Item or Item Category, in Product Attribute Value.
16. Precedence defaults from the segment number of the descriptive flexfield and you can change it. You must enter it for modifiers that have a product.
17. Enter Volume Type. It instructs the pricing engine which attribute of the item to use when qualifying for a modifier.

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---

**Note:** Valid types are Item Quantity and Item Amount. Period is reserved for future use.

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18. Enter = or BETWEEN in Operator; for example, item quantity = 5 or item quantity between 5 and 20.

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**Note:** If you select Recurring for Break Type, you must select BETWEEN.

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19. To create greater than and less than conditions, leave From Value and To Value blank, as follows:

- From Value = 5 and To Value blank creates the condition Value > 5
- From Value blank and To Value = 100 creates the condition Value < 100
- From Value = 5 and To Value = 100 creates the condition Value >= 5 and value <= 100

20. Enter the unit of measure of the item or item category in UOM.

21. Enter Value From and Value To.

22. Enter Break Type.

Break Type performs differently depending on Modifier Type.

It is optional for the following types:

- Discount
- Surcharge
- Freight Charge
- Promotional Goods
- Coupon Issue.

Choose either:

- Point
- Recurring

**Table 4–5 Point Break Type**

Field	Value
Break Type	Point
Modifier Line Type	Discount

**Table 4–5 Point Break Type**

<b>Field</b>	<b>Value</b>
Product Attribute	Item
Product Attribute Value	Item A
Volume Type	Item Quantity
Operator	Between
UOM	Cases
Value From	100
Application Method	Amount
Value	2

The pricing engine interprets this point setup as order 100 cases of item A and get a 2 currency unit discount. If you order 200 cases of item A you receive a 2 currency unit discount.

**Table 4–6 Recurring Break Type**

<b>Field</b>	<b>Value</b>
Break Type	Recurring
Modifier Line Type	Discount
Product Attribute	Item
Product Attribute Value	Item A
Volume Type	Item Quantity
Operator	Between
UOM	Cases
Value From	100
Application Method	Percent
Value	2

The pricing engine interprets this recurring setup as order 100 cases of item A and get a 2 currency unit discount. If you order 200 cases of item A you receive a 4 currency unit discount.

23. You must enter a value for Modifier Type Price Break to determine the method of calculating the volume break.

Choose either:

- Point: For Point, the pricing engine charges each unit of volume at the price of the break within which the total falls. For example, with reference to the table below, if the total for Item A is 150, the discount is 150 at 10%.
- Range: The pricing engine charges each unit of volume at the price of the break within which it falls. For example, with reference to the table below, if the total for Item A is 150, the discount is 100 at 5% and 50 at 10%.

**Table 4–7 Price Break**

<b>Product Attribute</b>	<b>Value From</b>	<b>Value To</b>	<b>Value (%)</b>
Item A	1	100	5
	101	200	10
	250	<all 9's>	15

24. Save your work.

## » To enter discount and charge information

Figure 4-7 Define Modifier

Define Modifier

Main Advanced

Type  Number   Active

Name  Version   Automatic

Currency  Start Date  -

Description

List Qualifiers

Modifiers Summary Discounts/Charges Promotion Upgrades Promotion Terms Coupons Price Breaks\*

Modifier No	Level	Modifier Type	Charge Name	Include On Returns	Formula	Appl
1	Order	Discount		<input checked="" type="checkbox"/>		Amc
2	Line	Price Break I		<input checked="" type="checkbox"/>		
3	Line	Discount		<input checked="" type="checkbox"/>		Per
				<input type="checkbox"/>		
				<input type="checkbox"/>		

Exclude Pricing Attributes Line Qualifiers Define Details\*

1. In the Discount/Charges tabbed region, select or clear Include on Returns. If you select it, the pricing engine includes freight charge on returns. The default is selected.
2. If you are using a formula to calculate a discount, surcharge, or freight charge, enter the formula name in Formula.
3. Enter the Application Method to instruct the pricing engine how to apply this modifier. Valid values are:
  - Amount: Creates a fixed price adjustment on each unit for the amount specified in the Value.
  - Percentage: Creates a percentage price adjustment on each unit for the percentage specified in the Value.
  - New price: Overrides the selling price of this item and makes the new price specified in the Value the new selling price. Creates a price adjustment for the difference in list price and the new price.

- Lumpsum: Creates a price adjustment for this lump sum amount on the entire line.

**Table 4–8 Application Method**

List Price	Item	Quantity Ordered	Application Method	Value	Price Adjustment	Extended Selling Price
10	Item A	200	Amount	5	5 per unit	1000
10	Item A	200	Percent	5	5%	1900
10	Item A	200	New Price	5	5	1000
10	Item A	200	Lumpsum	5	5 off	1995

4. Enter Value of the application method.

Use steps 5 through 11 if you are entering an accrual.

5. For line type Discount, select or clear Accrue.

6. Enter Benefit Qty and Benefit UOM of the benefit that you want to accrue. Use the benefit columns to define non-monetary accruals.

7. Enter Expiration Date to specify when the accrued transactions expire.

8. Enter Expiration Period and Period Type. The pricing engine calculates expiration date. Expiration period begins when item begins to accrue.

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**Note:** You cannot enter these fields if you enter Expiration Date

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9. Rebate Transaction is reserved for future use.

10. % Estimated Accrual Rate is reserved for future use.

11. Enter Accrual Conversion Rate to specify the conversion of the Benefit UOM to the primary currency. For example, if one air mile is 0.50 currency units, the accrual conversion rate is 0.50.

12. Save your work.

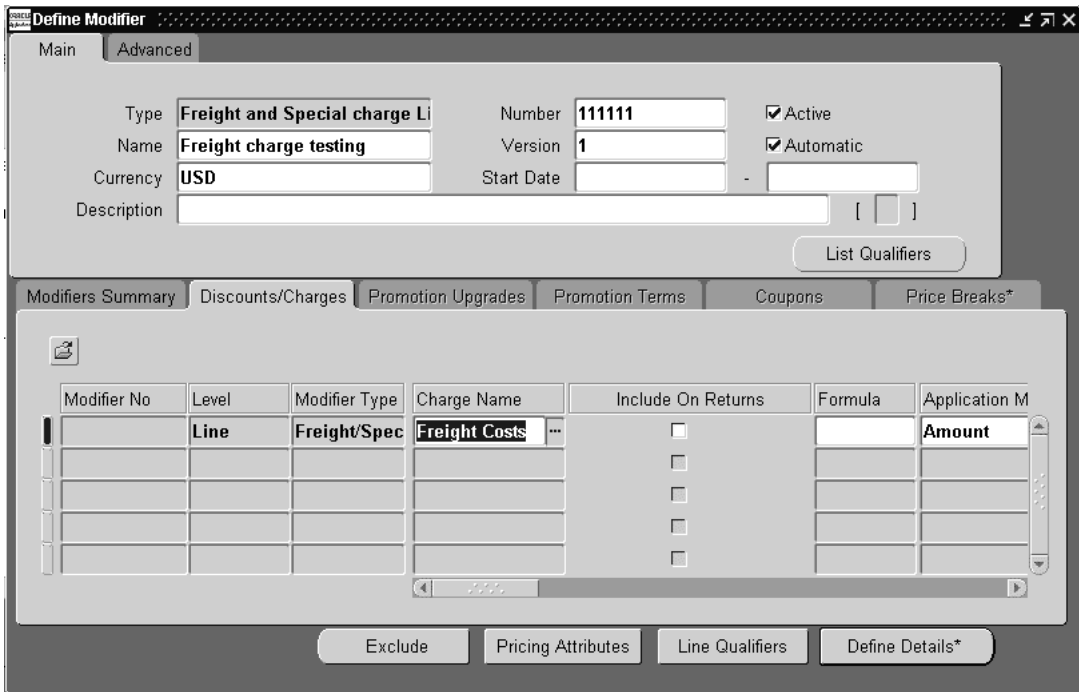
## ▶▶ To enter freight charge information

1. Enter the following information in the Modifiers Summary tabbed region

- Level: Use Line or Order

- Modifier Type: Use Freight/Special Charge
  - Phase: If Level is Line: use Line Charge or Line Manual Charge. If level is Order: use Order Line Charge.
  - Bucket
2. In the Discounts/Charges tabbed region, enter charge name in Charge Name.

**Figure 4–8 Define Modifier**



3. Select or clear Include on Returns. If you select it, the pricing engine includes freight charge on returns. The default is selected.
4. If you are using a formula to calculate a discount, surcharge, or freight charge, enter the formula name in Formula.
5. Enter the Application Method to instruct the pricing engine how to apply this modifier. Valid values are:
- Percent

- Amount
- Lumpsum

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---

**Note:** If Level is Order, you can only select Percent.

If you are using a formula, set Application Method to Amount and leave Value blank.

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6. Enter Value unless you are using a formula.
7. Save your work.

### ▶▶ To enter item upgrade information

1. Enter the following information in the Modifiers Summary tabbed region:
  - Level
  - Modifier Type: Use Item Upgrade
  - Phase
  - Bucket
  - Product Attribute
  - Product Attribute Value
  - UOM
2. In the Promotional Upgrades tabbed region, enter Upgrade Item.

Figure 4–9 Define Modifier

The screenshot shows the 'Define Modifier' window with the following details:

- Tab:** Main
- Type:** Promotion
- Name:** sp3
- Currency:** USD
- Description:** test for item category
- Number:** sp3
- Version:** (empty)
- Start Date:** (empty)
- Active:**
- Automatic:**
- Buttons:** List Qualifiers
- Navigation Bar:** Modifiers Summary | Discounts/Charges | Promotion Upgrades | Promotion Terms | Coupons | Price Breaks\*
- Table:**

Modifier No	Level	Modifier Type	Upgrade Item
sp3	Line	Item Upgrade	AITG
- Bottom Buttons:** Exclude | Pricing Attributes | Line Qualifiers | Define Details\*

---

**Note:** Before entering the upgrade item, relate the item and its upgrade item in Oracle Inventory. Select Promotional Upgrade for Relationship Type. When you complete this relationship, the related item appears in the list of values for this field.

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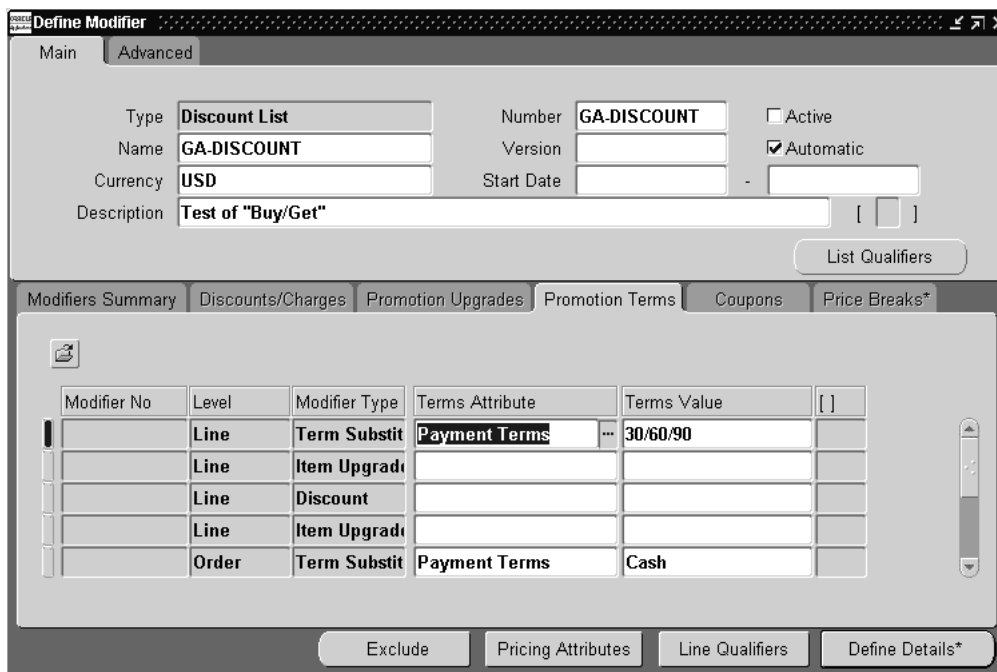
When the pricing engine applies the qualifying item on the order line, it changes the original item to the upgraded item and retains the price of the original item.

3. Save your work.

**» To enter terms substitution information**

1. Enter the following information in the Modifiers Summary tabbed region:
  - Level
  - Modifier Type
  - Phase
  - Bucket
2. In the Promotion Terms tabbed region, enter the Terms Attribute.

**Figure 4–10 Define Modifier**



The pricing engine substitutes the terms on the order or line the terms that you specify:

3. Enter the new terms in Terms Value.
4. Save your work.

**» To enter coupon issue information**

1. Enter the following information in the Modifiers Summary tabbed region:

- Modifier Number

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**Note:** You must enter a value. The pricing engine uses the number to generate a unique number series for the coupon. It passes the coupon number to the calling application; the customer quotes this number when redeeming the coupon.

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- Level
- Modifier Type
- Phase

2. In the Coupons tabbed region, skip Benefit Qty and Benefit UOM fields and enter Expiration Date of the coupon.

**Figure 4–11 Define Modifier**

The screenshot shows the 'Define Modifier' application window. The 'Advanced' tab is selected. The main form contains the following fields:

- Type: Promotion
- Name: Amy qualification test
- Currency: USD
- Number: Amy
- Version:
- Start Date:
- Active:
- Automatic:

Below the main form is a tabbed interface with the following tabs: Modifiers Summary, Discounts/Charges, Promotion Upgrades, Promotion Terms, Coupons, and Price Breaks\*. The 'Price Breaks\*' tab is active, displaying a table with the following data:

Modifier No	Level	Modifier Type	Benefit Quantity	Benefit UOM	% Estim Benefit Rate
2	Line	Discount			
3	Line	Promotional			
4	Line	Discount			
5	Line	Coupon Issue			100
6	Line	Price Break I			

At the bottom of the window are buttons for 'Exclude', 'Pricing Attributes', 'Line Qualifiers', and 'Define Details\*'.

---

**Note:** This is the last date that the customer can redeem the coupon.

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As an alternative, enter the following three fields and the pricing engine calculates Expiration Date:

- Expiration Period Start Date
- Expiration Period
- Period Type

For example, a coupon with Expiration Period Start Date 20 April, Expiration Period 3, and Period Type Month expires on 20 July.

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**Note:** If you do not enter Expiration Period Start Date, the pricing engine will use the date that the calling application issued the coupon.

---

3. Enter % Estimated Coupon Rate to specify the percentage probability that customers might redeem this coupon.
4. Enter Coupon Conversion Rate to specify the conversion of the Benefit UOM to the primary currency. For example, if one air mile is 0.50 currency units, the accrual conversion rate is 0.50.
5. Enter the Coupon Modifier Number to select an existing discount or promotional good as a benefit of the coupon.

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**Note:** Modifier type coupon issues use a predefined modifier type discount or promotional good to specify the benefit (the get) that you receive when you redeem the coupon. When you create a coupon issue, you attach an existing discount or promotional good.

---

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6. Save your work.

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**Note:** Qualifiers that you attach to a coupon issue determine which customer gets the coupon. When the customer redeems the coupon, the pricing engine validates the coupon number against the customer qualifier and also validates the qualifiers for the discount or promotional goods benefit (the get).

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## ► To enter other item discount and promotions information

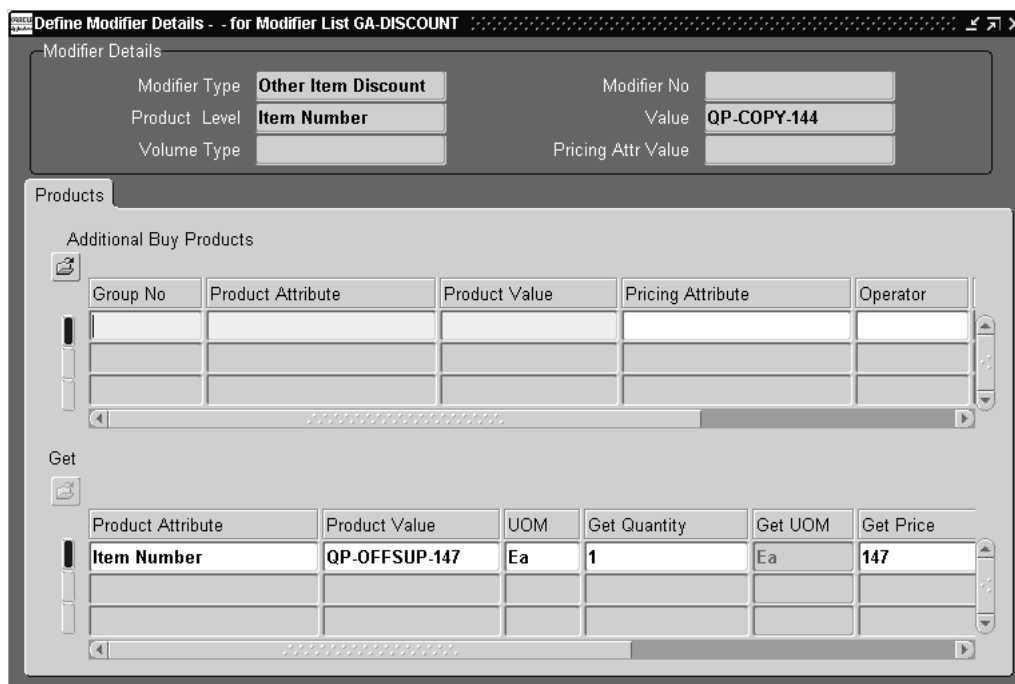
Other Item Discount gives a price adjustment or benefit to a specific item already on an order (the get item) when the customer orders one or more other specified items (the buy items) on the same order.

Promotional Goods adds a new item to an order and gives this item a price adjustment or benefit when the customer orders one or more specified items on the same order. The item does not need to be originally on the order. Even if the item is on the order, the pricing engine creates a new line for the item.

1. Enter the following information in the Modifiers Summary tabbed region:
  - Level
  - Modifier Type
  - Phase: For Other Item Discount, Phase defaults to 30 All Lines Adjustment. If you create a new phase to use for this modifier type, set Phase to 30 All Lines Adjustment.

- Bucket
  - Product Attribute
  - Product Attribute Value
  - UOM
2. Click Define Details\*.

**Figure 4–12 Define Modifier Details**



The Product window displays.

3. Perform steps 4 through 10 for each buy product.

---

---

**Note:** Use the Additional Buy Products region to specify the buy condition of the modifier along with the original product from the Modifiers Summary tabbed region. The pricing engine considers the product that you define in the Modifier Summary as the primary item and uses it to determine the eligibility of the get condition. It also verifies other buy items.

---

---

4. In the Additional Buy Products region, enter the Group Number to specify the AND or OR condition of the buy side of the modifier. To join lines with AND, use the same group number on each line; to join lines with OR, use a different group number on each line
5. In Product Attribute, select a segment in the item context of the Pricing Context descriptive flexfield, for example, Item, Item Category, or All Items
6. Enter the value for the segment, for example, Item or Item Category, in Product Attribute Value.
7. Enter the unit of measure of the item or item category in UOM.
8. Enter Pricing Attribute.

---

---

**Note:** This is a volume pricing attribute; use either item quantity or item amount.

---

---

9. Enter = or Between in Operator.
10. Enter Value From and Value To.
11. Perform steps 12 - 18 for each get product.

---

---

**Note:** Use the Get region to specify the get condition of the modifier. You must define get information for modifier types Other Item Discount and Promotional Goods.

---

---

12. In the Get region, enter Item Number or Item Category in Product Attribute.
13. Enter the item number or item category in Product Attribute Value.
14. Enter the quantity of the product that you want to offer in this modifier. in Get Quantity.

---

---

**Note:** You must enter this field for modifier type Promotional Goods.

---

---

15. Enter the unit of measure of this product in Get UOM.
16. Enter Get Price. The list of values displays all price lists that contain the item.

---

---

**Note:** You must enter this field for modifier type Promotional Goods.

---

---

17. Enter Application Method. Valid values are:

- Amount
- Percentage
- Lumpsum

18. Enter the Value of the application method.
19. Save your work.

#### ►► To enter price break information

1. Enter the following information in the Modifiers Summary tabbed region:
  - Level
  - Modifier Type: Use Price Break Header
  - Phase
  - Bucket
  - Break Type: Use Point or Range
  - Product Attribute
  - Product Attribute Value
  - UOM
  - Volume Type
2. In the Price Breaks region, enter Adjustment Type.

Figure 4–13 Price Breaks

The screenshot shows the 'Define Modifier' window with the following details:

- Advanced Tab Fields:**
  - Type: Discount List
  - Name: Gold Price Break for Serv
  - Currency: USD
  - Description: Price Break for Consulting Services for Imaging Innovations
  - Number: D0003
  - Version: 1
  - Start Date: [Empty]
  - Active:
  - Automatic:
- Price Breaks\* Tab Table:**

Modifier No	Level	Modifier Type	Adjustment Type	Accrue	Expiration Date	Expiration
	Line+	Price Break I		<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		

3. Valid types are:
  - Discount
  - Surcharge
4. To instruct the pricing engine to use the price break to calculate an accrual, select Accrue.

---

**Note:** You can have an accrual only for Adjustment Type Discount.

---

5. Enter Expiration Date to specify when the accrued transactions expire.
6. Enter Expiration Start Date, Expiration Period and Period Type. The pricing engine calculates expiration date. Expiration period begins when the item begins to accrue.

---

**Note:** You cannot enter these fields if you enter Expiration Date.

---

7. Rebate Transaction Type defaults to Credit Memo and is reserved for future use.

8. Estimated Accrual Rate is reserved for future use.
9. Click Define Discount.
10. In the Price Break tabbed region, enter Value From and Value To
11. If you are using a formula to calculate a discount, enter the formula name in Formula.
12. Enter Application Method. Valid values are:
  - Amount
  - Percentage
  - New Price
13. Enter Value of the application method
14. Enter Benefit Qty and Benefit UOM.
15. Enter Accrual Conversion Rate to specify the conversion of Benefit UOM to the modifier primary currency. For example, if 1 air mile is 0.50 currency units, Accrual Conversion Rate is 0.5.
16. Save your work.

### **Creating Line Level Qualifiers**

Use this process to create line level qualifiers.

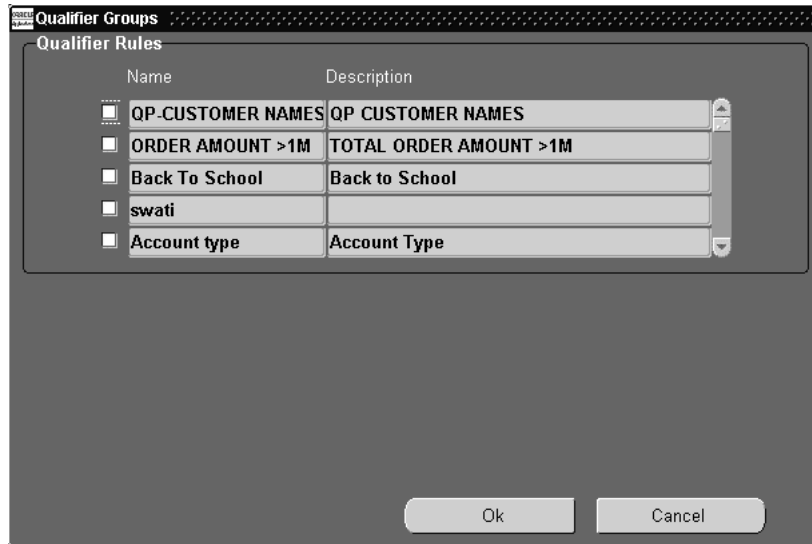
Modifier line level qualifiers help the pricing engine to determine who is eligible for the modifier lines. If an order is not eligible for a modifier list, it is not eligible for that list's line level modifiers even if the lines have qualifiers for which the order is eligible.

When creating qualifiers, consider secondary price lists that you use. If a customer qualifies for a discount, for example, from Price List A but the effectivity of the item drives the engine to the secondary price list (Price List B), the customer does not receive the discount unless the qualifier also includes Price List B.

#### **►► To create line level qualifiers**

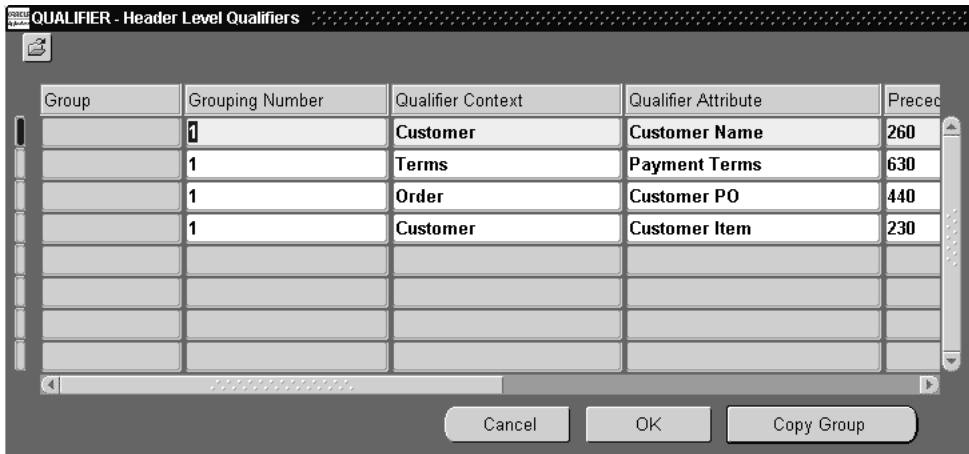
1. Navigate to the Define Modifier window.
2. Navigate to the Modifiers Summary tabbed region and select a modifier.
3. Select Line Qualifiers.

**Figure 4–14 Qualifier Groups**



4. If the Qualifier Groups window appears, this line has no qualifiers. If you desire, select one or more qualifier groups and click OK; otherwise, click Cancel.

**Figure 4–15 QUALIFIER - Header Level Qualifiers**



5. The QUALIFIER window appears. You can add, change, and delete qualifiers; change the grouping numbers, and change the dates.

---

---

**Note:** Some qualifiers use large valusets, for example, those based on all customers. For the Value From and Value To fields, if you want to reduce the number of items that display in the list of values:

- Enter search criteria in the field
- Click the list of values indicator

If you do not enter search criteria and click the list of values indicator, you see a window which advises that you have not entered search criteria and that the search may take a long time:

- If you want to see a reduced list of values display, click No, enter search criteria, and click the list of values indicator
- If you want to see the entire list of values display, click Yes.
- If you do not want to see the list of values, click Cancel.

Set the profile option QP: Valueset Lookup Filter to avoid this message.

---

---

Click Copy to add qualifiers from other qualifier groups.

6. View precedence numbers in Precedence. They default from the qualifier definition.

The pricing engine uses precedence for resolving incompatibility. If multiple modifiers are eligible within the same phase and incompatibility level, it looks at the precedence on the qualifiers and product attribute and applies the modifier with the lowest precedence.

7. Click OK.
8. Save your work.

---

---

**Note:** The start and end dates of the list qualifiers must be within the start and end date of the modifier list.

---

---

### Attaching Pricing Attributes

Use this process to attach attributes to the items and item categories that you define in modifier lines. When the pricing engine determines eligibility for a modifier, it validates the pricing attributes along with the item number or item category.

---



---

**Note:** Pricing attributes apply only to the primary items that you define on the Modifiers Summary tabbed region. They do not apply to items that you define for additional buy items and get items.

---

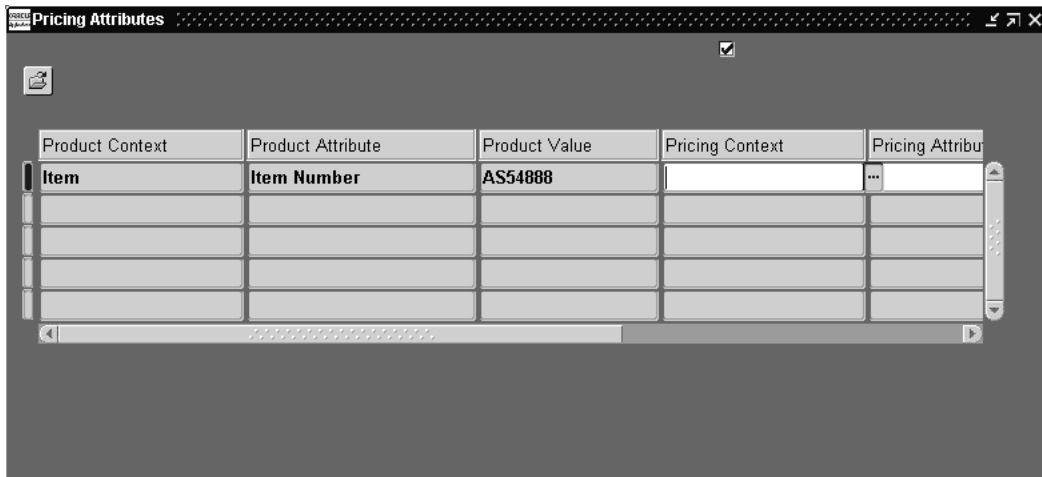


---

### ►► To attach pricing attributes

1. Navigate to the Define Modifier window.
2. Navigate to the Modifiers Summary tabbed region and select a modifier.
3. Click Pricing Attribute.

**Figure 4–16 Pricing Attributes**



The More Pricing Attributes window appears.

4. Enter a pricing context in Pricing Context.
5. Enter a pricing attribute in Pricing Attribute.
6. Enter Value From and Value To.
7. Click OK.
8. Save your work.

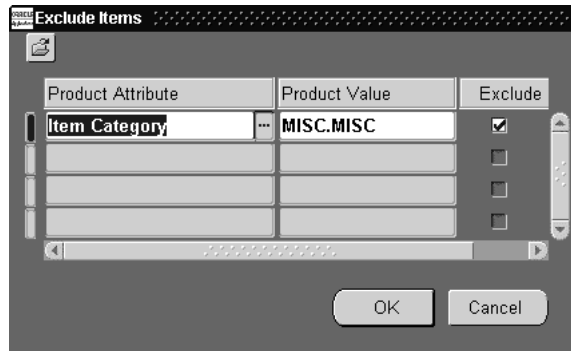
### Excluding Items

Use this process to exclude items.

**» To exclude items**

1. Navigate to the Define Modifier window.
2. Navigate to the Modifiers Summary tabbed region and select a modifier.
3. Click Exclude.

**Figure 4–17 Exclude Items**



The Exclude Items window appears.

4. Enter a product attribute in Product Attribute.
5. Enter the product value to exclude in Product Value.
6. Select Exclude
7. Click OK.
8. Save your work.

**Changing Modifier Incompatibility**

You can review and change incompatibilities on one form. When you query incompatibility levels for a specific phase, you see the modifier lines attached to each incompatibility group and can assign them to a new incompatibility level.

**» To change modifier incompatibility**

1. Navigate to the Modifier Incompatibility Setup form.

Figure 4–18 Incompatibility Groups

Phase Sequence: 10  
Phase Name: List Line Adjustment  
Incompatibility Group: [ ]

Phase Lines

Incompatible Group	Modifier Name	List Type	Line Number	Line Type	Application Method
EXCL	kn-03	Discount List	1	Discount	New Price
EXCL	kn04	Discount List	1	Discount	New Price
EXCL	VL TEST	Discount List	1	Discount	New Price
EXCL	RAM5000	Discount List	1	Discount	New Price
EXCL	RAM5100	Discount List	1	Discount	New Price
EXCL	GSA-QG-DISC2	Discount List	1	Discount	New Price
EXCL	10000	Freight and S	1	Freight/Spec	Percent
EXCL	RAM5300	Discount List	1	Discount	New Price

Modifiers

The Incompatibility Groups form appears.

2. Run a query using one of the following criteria:
  - Phase sequence
  - Phase name
  - Incompatibility group
  - Phase sequence and incompatibility group

---

**Note:** If you query a phase without specifying an incompatibility Group, the form returns all modifier lines for this phase, even if they do not have an assigned incompatibility group.

---

3. View the following information for each modifier line that displays:
  - Incompatibility Group
  - Modifier Name
  - List Type
  - Line Number
  - Line Type
  - Application Method
  - Start Date Active
  - End Date Active
  - Benefit Quantity
  - Value
  - Product Precedence
  - Product Attribute
  - Product Attribute Value
  - Benefit UOM
  - Accrual Flag
  - Recurring Flag

---

---

**Note:** You can only update Incompatibility Group.

---

---

Perform steps 4-7 for each modifier whose incompatibility group you want to change.

4. Select a modifier and click Modifiers.

Figure 4–19 Define Modifier

The screenshot shows the 'Define Modifier' window with the following details:

- Main Tab:**
  - Type: Discount List
  - Name: QP-\$100 DISCOUNT FOR STQI
  - Currency: USD
  - Description: [Empty]
  - Number: \$100 DISCOUNT
  - Version: 1
  - Start Date: [Empty]
  - Active:
  - Automatic:
- Advanced Tab:**
  - Modifiers Summary: Discounts/Charges, Promotion Upgrades, Promotion Terms, Coupons, Price Breaks\*
- Table:**

Modifier No	Level	Modifier Type	Start Date	End Date	Print On Invoice
1	Order	Discount	01/JAN/1970	01/MAY/1970	<input checked="" type="checkbox"/>
2	Line	Price Break I			<input checked="" type="checkbox"/>
3	Line	Discount			<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
- Buttons:** Exclude, Pricing Attributes, Line Qualifiers, Define Details\*

5. The Modifier Setup window for the modifier list to which modifier line belongs displays.
6. You can select a different group from the list of values.
7. Save your work.

## Redeeming Accruals

You can mark accrued price adjustments as redeemed and record redemption transaction information. In addition, you can unredeem coupons recorded as redeemed in error.

---

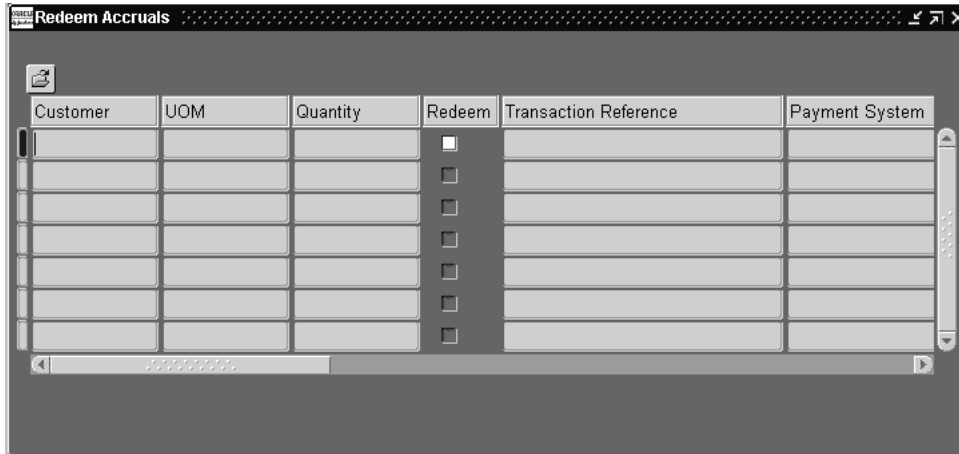
**Note:** You cannot create an accrual record in this form.

---

» To redeem accruals

1. Navigate to the Accrual Redemption form.

Figure 4–20 Redeem Accruals



The Accrual Redemption form displays.

2. Query accrual records.

---



---

**Note:** Clear Redeem and enter customer name to find all unredeemed accruals for a customer. The form only displays accrual records that the pricing engine created.

---



---

3. Perform steps 4-7 for each accrual that you want to redeem.

---



---

**Note:** You can not mark an accrual record as partially redeemed. For example, a customer purchases a computer and accrues 100 air miles. You cannot mark 60 air miles redeemed at one time and 40 air miles redeemed at a later time.

---



---

4. Select Redeem.
5. Enter the reference number from the system that redeemed the accrual in Transaction Reference.

6. Enter the name of the system that issued the payment for the accrual in Payment System.
7. Enter Redeemed Date. It defaults to the current date.
8. To mark a redeemed accrual record as unredeemed, clear Redeem. Verify that: Transaction Reference, Payment System, Redeemed Date are blank.
9. Save your work.



# 5

---

---

## Formulas

This chapter describes formulas and includes following topics:

- Overview of Formulas on page 5-2
- Updating Formula Prices on page 5-10

## Overview of Formulas

Formulas are mathematical expressions that the pricing engine uses to determine the list prices of items and the discounts that apply to those items. You can:

- Use them to:
  - Create a price from a computation as an alternative to entering prices in a price list.
  - Calculate a price adjustment. For example, you can instruct the pricing engine to calculate a discount by attaching a formula to a discount line.
- Set up and maintain formulas based on component types:
- Link them to a price list line or a modifier line.

When you attach a formula to a price list line, you typically do not enter a price for that line because the pricing engine uses the formula to calculate the final list price of the product or service. An exception to this is when you attach a formula that has a component of list price. For such a formula, you must enter the list price (base price) for the formula to use in its calculations.

- However, Oracle recommends that you only attach a formula that has a List Price component to price list lines (and not to modifier lines). See Oracle Pricing, Price Lists.
- Use static or dynamic formula calculations in price lists.

### Formula Creation

To create a formula, set up:

- The formula expression (*formula*) as the formula header. A formula is a valid mathematical expression that the Oracle database supports.
- The formula lines. Formula lines provide details about each part of the formula.

The formula expression contains any of the following:

- Parentheses, for example (and)
- Mathematical operators, for example +, -, /, and \*
- Built-in functions, for example NVL, SQRT, and MOD
- Operands: Operands are step numbers about which you provide more detail. You can use as many step numbers as you need, up to the limit of the field. You can repeat a step number in a formula, for example, 1+2\*2.

---

---

**Note:** An operand is not a numeric constant. If you want to use a numeric constant in a formula, you must create a step number in the formula expression and then assign the numeric constant to the step number in a formula line

---

---

The valid formula  $(1+2*\text{SQRT}(3)) / 4$  contains:

- 1, 2, 3, and 4 as operands
- +, \*, and / as mathematical operators
- SQRT as a built in function
- Parentheses to group the operands and operators

For each step number, create a formula line. In the previous formula example, you create four formula lines since the formula has four step numbers.

When Oracle Pricing calculates a formula, it does not use the face value of the step number. It refers to the formula line and evaluates it to obtain the value of the operand.

You assign one of the following types to each formula line:

- **Numeric constant:** A numeric value.
- **Function:** The function `GET_CUSTOM_PRICE` provides the hook that enables you to retrieve a price from an external system and to use this price in the formula calculation. You create the program logic to map to the external data source by developing PL/SQL program packages. The function `GET_CUSTOM_PRICE` returns a numeric value.
- **List price:** The price of the item in a specific price list to which you have attached a formula.
- **Price list line:** The price of the item in a specific line number of a specific price list.
- **Pricing attribute:** The absolute value of a pricing attribute (such as thickness or height) of an item.

Pricing attributes are characteristics of products and services that you can specify when the characteristics help to determine the price of a product or service. Distance, age of a related product, customer class, product family group, and level of service are examples of pricing attributes. You can specify one or a combination of pricing attributes and assign them to a

product or service. At order entry time, the pricing engine evaluates the attributes you have specified during formula setup to calculate the price.

You can define as many attributes as you need to meet your pricing business needs. For example, you may use the formula  $1*2$  to calculate the price of a glass item. Step 1 is a pricing attribute for thickness and step 2 is the list price to calculate the price of a glass item; if 100 is the base price of the glass item and 0.3 is the value of the thickness attribute of the glass then the pricing engine evaluates the formula as  $0.3*100$  which is 30.

- **Factor list:** A list of factors that you can link to multiple pricing attributes or a range of these attributes. The pricing engine evaluates the formula, chooses one of these factors depending into which range the actual pricing attribute of the item falls.

For example, a step in the formula has a different factor defined for different ranges of glass thickness; a glass with thickness between 0.1 and 0.3 mm has a factor of 3 and a glass with thickness between 0.4 and 0.8 mm has a factor of 5. The pricing engine determines which factor qualifies when it evaluates an order and applies this factor in the formula calculation.

You can also relate multiple factor conditions. For example, if the base pricing attribute for glass thickness is between 0.1 and 0.3 mm AND the length of the glass is between 0.5 and 2 m, apply the factor of 3 OR if the base pricing attribute for glass thickness is between 0.4 and 0.8 mm AND the length of the glass is between 0.5 and 2 m, apply the factor of 5.

### Null Values in Formulas

During formula calculation, if a step results in a null value, the formula fails. For example, in the formula  $1*2$ , step 2 is of type Pricing Attribute, pricing attribute context is Physical Attribute, pricing attribute is Volume, and the user should supply the volume at order entry time.

Since the user may not provide a volume use the NVL expression in the formula to point to a step that evaluates to a non-null value. Change the formula to  $1*NVL(2,3)$ . In the formula line for step number 3, arrange for a non-null value, for example the numeric constant 8. If the user does not provide a value for volume, the pricing engine uses 8 in the formula calculation.

If the expression does not use NVL in the expression, and the step number evaluates to NULL, the entire expression evaluates to NULL, the formula calculation fails, and the calling application processes the failure.

### GET\_CUSTOM\_PRICE

To use the Function formula type, modify the function `GET_CUSTOM_PRICE`. Write custom code in the function body that uses the standard input parameters. You can only write a function body that returns a number.

You can use the `GET_CUSTOM_PRICE` function in more than one formula. The formula ID is an input parameter which you can use to differentiate code logic among formulas.

To use the return value in a formula, do the following:

- Set up a formula having a formula line of type Function.
- Set the system profile option QP: Get Custom Price Customized to Yes at the Site level. If the pricing engine evaluates custom code within the `GET_CUSTOM_PRICE` function and the profile option is No, the formula calculation fails, and the calling application processes the failure.

`GET_CUSTOM_PRICE` is in the package `QP_CUSTOM` and its specification is `QPXCUSTS.pls`. `QP_FORMULA_PRICE_CALC_PVT` calls `QP_CUSTOM.Get_Custom_Price()`.

The pricing engine passes the parameters to the function. You may not change the `GET_CUSTOM_PRICE` parameters which are:

- `p_price_formula_id`: Primary key of the formula that uses the `Get_Custom_Price` function.
- `p_list_price`: List price on the price list line to which the formula using `Get_Custom_Price` is attached. May be null.
- `p_price_effective_date`: Pricing Effective Date, the date for which the pricing engine is evaluating the formula.
- `p_req_line_attr_tbl`: PL/SQL table of records containing context, attribute, and attribute value records for product and pricing attributes and a column indicating the type (Product Attribute or Pricing Attribute). The engine passes only the pricing and product Attributes of the price list line to which the formula is attached.

## Creating a Pricing Formula

Use this process to create and change formulas.

### ►► To create a pricing formula

1. Navigate to the Pricing Formulas window.

Figure 5–1 Pricing Formulas

Name: F\_DUTY\_COST

Description: Formula to convert Duty Cost to Duty Charge

Effective Dates: [ ] - [ ]

Formula: 1\*2

Formula Lines

Formula Type	Pricing Attribute Context	Pricing Attribute	Component	Step	[ ]
Pricing Attribute	Pricing Attribute	Duty Cost		1	
Numeric Constant			1.2	2	

Factors

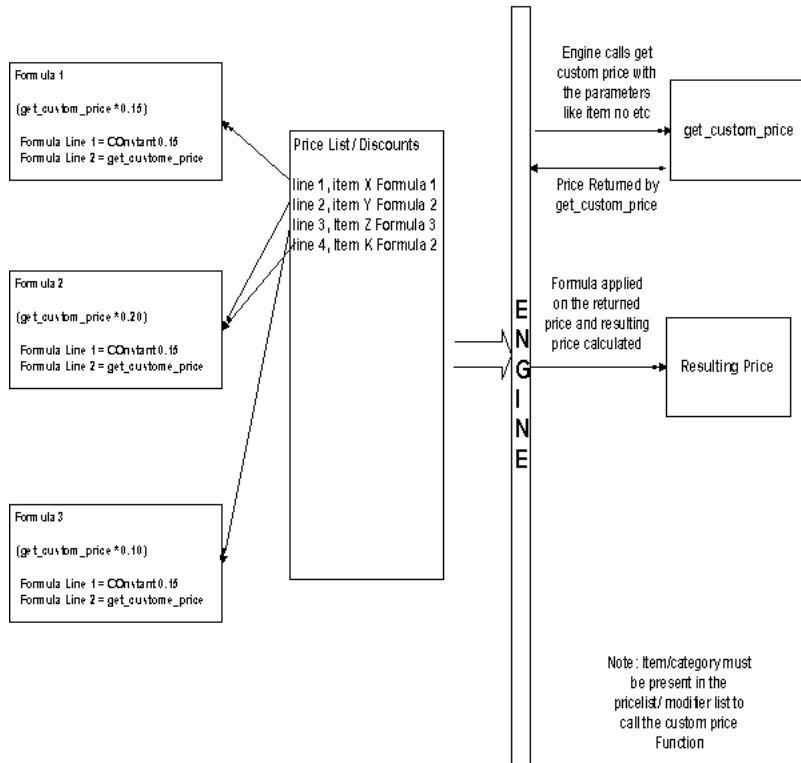
2. Enter a new pricing formula in Name.
3. Enter a description of the pricing formula in Description.
4. Enter the effective dates of the pricing formula in Effective Dates.
5. Enter the formula in Formula. The formula is an arithmetic expression made up of step numbers that you enter in the Formula Lines tabbed region. You can repeat step numbers in the formula.

In the Formula Lines region, perform steps 6-9 for each component of the formula.

6. Select a value for Formula Type.
7. Enter the following information depending on Formula Type:
  - Numeric Constant: Enter the numeric constant in Component.
  - Function: Component displays GET\_CUSTOM\_PRICE. You must write the function in this PL/SQL package and it must return a number. Please refer to Figure 5.2 for an overview of GET\_CUSTOM\_PRICE.

- Price list line: In Component, select a price list and item number from the list of values.
  - Pricing attribute: Select the pricing context in Pricing Attribute Context. Select the pricing attribute name in Pricing Attribute.
  - Factor List: Select or enter the name of a factor list in Component. To use an existing factor list, select it from the list of values. To create a new factor list, enter the name and the form creates it.
8. Enter the step number for the component. You cannot repeat step numbers in this region even though you can repeat step numbers in the formula.
  9. Save your work.
  10. If the Formula Type is Factor List, select Factors to enter factor list details.

**Figure 5–2 Get Custom Price**



## ►► To define factor list details

1. In the Pricing Formulas window, Formula Lines tabbed region, click Factors.

**Figure 5–3 Factors**

The screenshot shows the 'Factors' dialog box. It has a title bar 'Factors' and a close button. The main area is split into two sections:

**Base Pricing Attributes**

Attribute Context	Base Pricing Attribute	Operator	Value From	Value To	Adjustment Factor
Item	Item Number	=	5609		1000

**Associate Pricing Attributes**

Associated Pricing Attribute Context	Associated Pricing Attribute	Operator	Value From	Value To

At the bottom right, there are 'OK' and 'Cancel' buttons.

In the Base Pricing Attributes region, perform steps 2-8 for each base pricing attribute factor.

2. Select a value for Base Pricing Attribute Context.

If you have multiple entries, you must use the same base context in this region (to create an OR condition); the pricing engine chooses one of the entries. Use the Associate Pricing Attributes region to associate additional contexts with the base context (to create an AND condition).

3. Select a value for Base Pricing Attribute.
4. Select Comparison Operator and enter the Value From and Value To as follows:

If you select Between, you must enter a value for Value From. If you do not enter a value for Value To, it defaults to unlimited.

If you select =, you must enter Value From and you cannot enter Value To.

5. Enter the Adjustment Factor.
6. Perform steps 7 and 8 for each associate pricing attribute.
7. In the Associate Pricing Attributes region, select an Associated Pricing Attribute Context and Associated Pricing Attribute to associate with the base pricing attribute context and base pricing attribute values (to create an AND condition).
8. Select Comparison Operator and enter the Value From and Value To as follows:  
  
If you select Between, you must enter a value for Value From. If you do not enter a value for Value To, it defaults to unlimited.  
  
If you select =, you must enter Value From and you cannot enter Value To
9. Save your work.

## Updating Formula Prices

Use process when you use static formulas to set list prices.

When you attach a formula to a price list line, you can choose:

- Dynamic calculation: When you enter an order the pricing engine uses the formula to calculate list price.
- Static calculation: Prior to order entry, you execute a concurrent process which calculates the list price.

## ►► To update formula prices

1. Navigate to the Update Formula Prices window.

**Figure 5–4 Update Rule Prices**

The screenshot shows a window titled "Update Rule Prices" with a dark background. At the top, there are three radio button options:
 

- New and Modified Lines Only of Price Lists
- Update All Pricing Formulas for Price Lists
- Update Individual Pricing Formula for Price Lists

 Below these options is a text input field labeled "Pricing Formula" with the text "F\_DUTY\_COST" entered. At the bottom left, there is a text input field labeled "Request ID". At the bottom right, there is a button labeled "Submit".

2. To instruct the process to calculate formula-based prices for price list lines whose formulas you have added or changed since the process last executed, select **New and Modified Lines Only of Price Lists**.  
To instruct the process to calculate formula-based prices for all price list lines, clear **New and Modified Lines Only of Price Lists**.
3. To instruct the process to consider price list lines that have any formula, select **Update All Pricing Formulas for Price Lists**.

To instruct the process to consider price list lines that have a certain formula:

- Select **Update Individual Pricing Formula for Price Lists**
- In **Pricing Formula**, select the pricing formula from the list of values.

The process applies this choice after it selects the price list lines according to the criteria for Step 2.

4. Click **Submit**. The request ID is displayed in the **Request ID** field.



# 6

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## Price Lists

This chapter describes price lists and includes the following topics:

- Overview of Price Lists on page 6-2
- Creating a Price List on page 6-6
- Deleting Price List Information on page 6-17
- Copying a Price List on page 6-18
- Adjusting a Price List on page 6-20
- Adding Items to a Price List on page 6-22
- Creating a GSA Price List on page 6-24

## Overview of Price Lists

### Price Lists

Price lists are essential to ordering products because each item entered on an order must have a price. Each price list contains basic list information and one or more pricing lines, price breaks, pricing attributes, qualifiers, and secondary price lists. Basic information includes the price list name, effective dates, currency, pricing controls, rounding factor, and shipping defaults such as freight terms and freight carrier.

### Effective Dates

Price lists can have starting and ending dates. This allows you to prepare price lists ahead of when they are valid and to ensure they will not be used until their start dates.

### Inactive Price Lists

You can temporarily or permanently inactivate a price list using the active flag. After you inactivate a price list:

- You can query it: In query mode, the checkbox appears as checked, but the underlying value is null. To retrieve only price lists that are inactive, clear the checkbox; to retrieve only price lists that are active, clear then checkbox, then select it.
- You can change it
- The pricing engine does not select it in response to a pricing request
- Other applications can use it; they can check its active flag and make whatever use of the information that they wish

### Price List Currency

If you have international sales, you can record transactions in different currencies by defining a price list for each currency. After entering the currency for an order or return, you must choose a price list in the same currency.

### Rounding Factor

You can define the number of places to the right or left of the decimal point to which the pricing engine rounds prices from price lists and modifiers from modifier lists. If you enter a negative number, you increase the number of characters to the right of the decimal point. If you enter a positive number, you affect more columns to the left of the decimal point. If you enter zero, you affect nothing

Rounding factor -3 indicates rounding to the nearest thousands (for example, 1.1445 rounds to 1.145). Rounding factor 2 indicates rounding to the nearest hundreds for example 107 rounds to 100).

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**Note.** You can limit the rounding factor value by the number of positions you specify in the extended precision format of the price list's currency—profile option QP\_UNIT\_PRICE\_PRECISION\_TYPE.

---

---

## Secondary Price Lists

The pricing engine uses secondary price lists when it cannot determine the price for an item using the price list assigned to an order. Primary and secondary price lists have the same currency.

If the item that you are ordering an item is not in the primary price list, the pricing engine uses the highest-precedence secondary price list (the secondary price list with the lowest value for the precedence field).

If an item appears on both the primary and a secondary price list with the same effective dates, the pricing engine uses the primary price list to price the item. If an item appears on the primary price list but is not active (the effective end date has passed), the pricing engine uses the price on the secondary price list.

## Agreement Price Lists

Oracle Pricing allows you to establish agreements with your customers that define the prices, payment terms, and freight terms that you negotiate.

There are two methods by which you can manage agreements:

- Standard agreements which use standard price lists (PRL)
- Pricing agreements which use agreement price lists (AGR)

## Defining Price Lists

Price lists contain item and item category prices. You can define and maintain multiple price lists.

You can define the following types of prices on price lists:

- Unit price: A fixed price.
- Percent Price: A price which is a percent of the price of another item.

- **Formula:** Multiple pricing entities and constant values related by arithmetic operators. For example, you define the price of an item to be a percentage price of another price list line.
- **Price Break:** If the price of an item varies with the quantity ordered, you can define bracket pricing or price breaks. For example:

**Table 6–1 Price Breaks**

<b>Attribute</b>	<b>Value</b>	<b>Value From</b>	<b>Value To</b>	<b>Price</b>
Item Number	A11111	1	11	50
Item Number	A11111	12	<all 9's>	45

There are two types of price breaks:

- **Point:** The pricing engine retrieves the absolute price that brackets the attribute.
- **Range:** The pricing engine computes the price based on the range of price breaks defined, starting from the lowest value of the price related to the attribute.

You must enter both Value From and Value To. To create no upper limit, enter all 9's in Value To. You cannot overlap ranges between the price ranges of price break; for example, if one price range is from 1 to 11, you cannot have another price range that is 5 to 20.

If you define a price break for an item category, all the items within the category are eligible for the price break.

## Price List Maintenance

You can:

- Manually add lines to a price list
- Copy price list lines from one price list to another
- Add a new group of inventory items to a price list by specifying a range
- Add a new group of inventory items to a price list by specifying an item category

## Copying Price Lists

You can quickly create a new price list by copying from an existing price list. You can copy a range of lines or all lines from the original price list. Only active price list lines (those with an effective end date later than the current date) copy.

You can choose:

- To copy active discounts from the original price list.
- To copy the effective dates from the original price list lines.

You can copy among Standard (PRL) and Agreement (AGR) price list types, that is, the price list from which you copy may be either a standard or agreement price list and the price list to which you copy may be either a standard or agreement price list. To view a copied Agreement price list, create a new agreement and attach the new price list to the agreement.

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**Note:** When you copy a price list, the new price list has the same currency as the original price list.

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### **Adding Inventory Items**

When you add inventory items to a price list, you can specify an item status, such as active or planned; an item category, such as hardware or software; or a range of items. You can request the price to be either zero or the items' costs in a specific inventory organization. Later, you can adjust the prices to your selling price.

The process only adds items that exist in the item validation inventory organization and that are not on the price list, even if they are inactive on the price list.

If you want to add items from an item category, you must first define the default inventory category set for Order Management. When you add items from an item category, the process adds all items of the item category to the price list; it does not add the item category.

### **Manual Changes to List Prices**

You can always change the price on an existing price list line. If you type over the existing price, the new price is effective for new orders as soon as you save your changes.

If you use price list line effectivity dates, you can maintain a historical record of your prices.

### **Adjust Price Lists**

You can increase or decrease the list price of price list lines by an amount or percentage. You can apply the increase or decrease to all lines on the price list, lines that belong to an item category, lines with items of a certain status, lines created on a specified date, or lines having a range of items.

Mass changes do not maintain price history.

### **Creating a Price List**

Use this process to create and change price lists.

#### **►► To create a price list**

1. Navigate to the Price Lists window.

Figure 6–1 Price Lists

The screenshot shows a software window titled "Price Lists" with a sub-header "Price List". The window contains several input fields and a table. The fields are: Name (text box), Active (checkbox, checked), Description (text box), Currency (dropdown menu showing "USD"), Round To (text box showing "-2"), Effective Dates (text box showing "26-JAN-2001" and another empty text box), Payment Terms (text box), Freight Terms (text box), Freight Carriers (text box), and Comments (text box with a scroll bar). Below the fields are three tabs: "List Lines", "Secondary Price List", and "Qualifiers". The "List Lines" tab is active, showing a table with the following columns: Product Context, Product Attribute, Product Value, UOM, Primary UOM, and Line T. The table has five rows, with the first row containing a scroll bar in the Product Context column and checkboxes in the Primary UOM column. Below the table are two buttons: "Price Breaks" and "Pricing Attributes".

The Price Lists window appears.

2. Enter a price list name in Name.
3. To inactivate the price list, clear Active.
4. Enter a description of the price list in Description.
5. Enter the price list currency in Currency.
6. Enter a rounding factor to be applied to the price list in Round To.

A positive number indicates number of places to the left of the decimal point; a negative number indicates number of places to the right of the decimal point. The default is -2.

The pricing engine rounds the base price and all discount amounts before using them in calculations.

The value returned depends on the value that you have set for the profile option QP\_UNIT\_PRICE\_PRECISION\_TYPE:

- Standard: The rounding factor defaults to the currency's precision value. You can override the rounding factor to any value greater than or equal to the currency's precision value.
  - Extended: The rounding factor defaults to the currency's extended precision value. You can override the rounding factor to any value greater than or equal to the currency's extended precision value.
7. Enter the starting and ending effectivity dates of this price list in Effective Dates.  
The Start Date defaults to the current date.
  8. Enter a default payment term, in Payment Terms.
  9. Enter default freight terms in Freight Terms.
  10. Enter default carrier in Freight Carrier.
  11. Enter a comment in Comments.
  12. Navigate to the List Lines tabbed region.

Perform the remainder of the steps for each price list line that you want to create.

13. Select Item in Product Context.
14. In Product Attribute, select a segment in the item context of the Pricing Context descriptive flexfield, for example, Item, Item Category, or All Items.

---

---

**Note:** Use All Items to define a modifier that applies to all items in your product hierarchy.

---

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15. Enter the value for the segment, for example, Item or Item Category, in Product Attribute Value.
16. The unit of measure defaults from the item master of the validation organization. You can change it to any valid unit of measure for that item.
17. Select Application Method as follows:
  - Unit Price for inventory items and item categories
  - Either Unit Price or Percent Price for service items
18. Enter Operand and Formula as follows:
  - For inventory items and item categories, enter the base list price of the item in Operand.

- For service items, enter a value in the Operand. If Application Method is Unit Price, enter the base list price of the item. If Application Method is Percent Price, enter a percent of another item's price.
- Enter either a static formula in Static Formula or a dynamic formula in Dynamic Formula.

If you enter a static formula, run a concurrent process to calculate the value. The result of the calculation changes the value of Value.

If you enter a dynamic formula, you only need to enter Value if the formula includes list price as one of the formula components. At pricing time, the pricing engine calculates the price of the item using the formula. If the formula does not return a price, the engine uses the value of Price as the price.

For more information on formulas, see Oracle Pricing, Formulas.

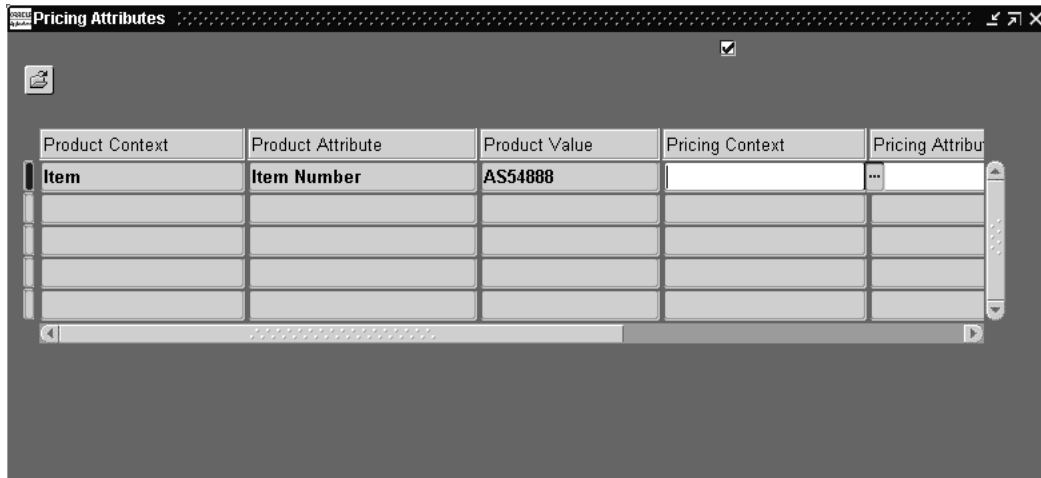
19. Enter the starting and ending effectivity dates of this price list line in Start Date and End Date. The dates should be within the start and end effectivity dates of the price list.
20. Select Price List Line for Line Type.
21. Enter a value in Precedence; this is the product precedence.

When the pricing engine is trying to locate a price, it uses precedence to resolve conflicts when it selects more than one price list line from a price list.
22. Select Primary UOM if this price list line unit of measure is the primary pricing unit of measure for the item. The pricing engine uses the primary pricing unit of measure and the Oracle Inventory unit of measure conversion information to price an order whose unit of measure does not have a price list line. For example, a price list has two price list lines for item A11111, one with unit of measure EA—the primary UOM—and one for boxes. When the pricing engine receives an order in unit of measure CS, it accesses the unit of measure conversion tables to convert CS to EA.
23. Save your work

## ►► To define pricing attributes

1. Click Pricing Attributes in the List Lines tabbed region.

**Figure 6–2 Pricing Attributes**



The Pricing Attributes window appears.

2. Enter a pricing context in Pricing Context.
3. Enter a pricing attribute in Pricing Attribute.
4. Select = or BETWEEN for Operator.
5. Enter Value From.
6. If Operator is BETWEEN, enter Value To.
7. Save your work.

---

**Note:** The pricing attributes are joined as AND conditions since they apply to one price list line.

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►► **To define price breaks**

1. Click Price Breaks in the List Lines tabbed region. You can only enter price breaks when the Line Type is Price Break Header.

Figure 6–3 Price Breaks

Pricing Context	Pricing Attribute	Value From	Value To	Price
Volume	Item Quantity	100	500	2

The Price Breaks window appears.

Perform the remainder of the steps for each price break that you want to define.

2. Enter Value From.
3. Enter Value To.
4. Select Application Method as follows:
  - Unit Price for inventory items and item categories
  - Either Unit Price or Percent Price for service items
5. Enter Operand and Formula as follows:
  - For inventory items and item categories, enter the base list price of the item in Operand.
  - For service items, enter a value in the Operand. If Application Method is Unit Price, enter the base list price of the item. If Application Method is Percent Price, enter a percent of another item's price.
  - Enter either a static formula in Static Formula or a dynamic formula in Dynamic Formula.

If you enter a static formula, run a concurrent process to calculate the value. The result of the calculation changes the value of Value.

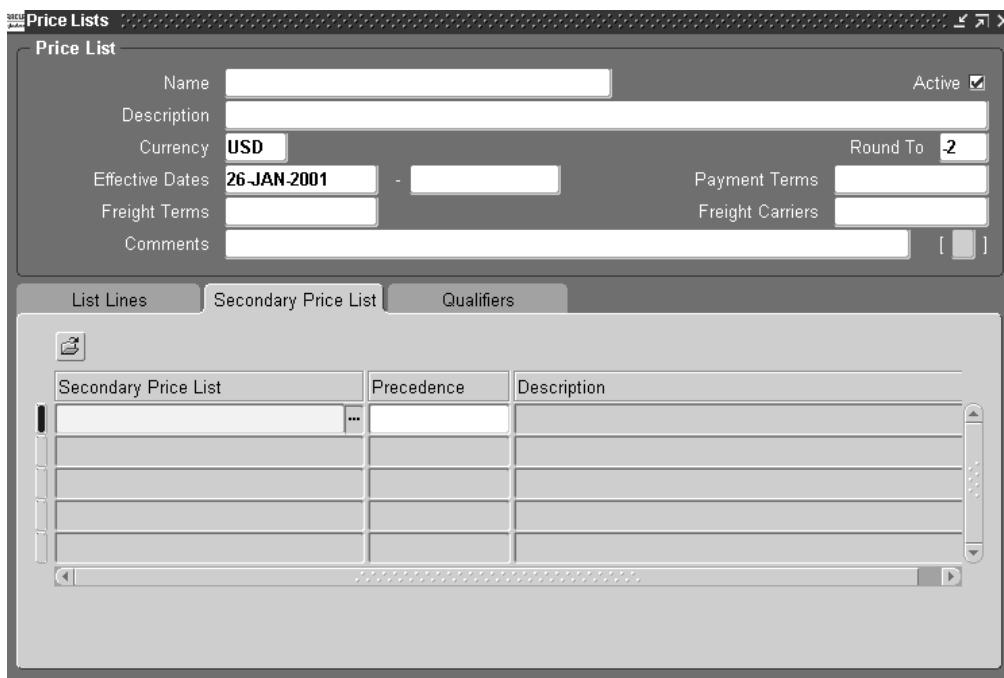
If you enter a dynamic formula, you only need to enter Value if the formula includes list price as one of the formula components. At pricing time, the pricing engine calculates the price of the item using the formula. If the formula does not return a price, the engine uses the value of Price as the price.

- 6. Save your work.

►► **To reference secondary price lists**

- 1. Choose the Secondary Price List tabbed region.

**Figure 6–4 Price Lists**



Perform the remainder of the steps for each secondary price list that you want to define.

- 2. Select a price list in Secondary Price List.

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---

**Note:** If you enter more than one secondary price list, all precedences fill with 140 and you must establish an order of precedence for the secondary price lists.

The pricing engine evaluates the precedence of the secondary price list along with the product precedence on the list lines to determine the most eligible price list line. For example:

- Secondary Price List A: Precedence 100; Item X: Precedence 140; List price 15
  - Secondary Price List B: Precedence 130; Item X: Precedence 120; List price 20
  - The pricing engine selects the price of 20 because its secondary price list precedence is higher.
- 
- 

3. Save your work.

## ► To define qualifiers

1. Select the Qualifiers tabbed region.

**Figure 6–5 Price Lists**

The screenshot shows the Oracle Price Lists application interface. At the top, there's a title bar 'Price Lists'. Below it, a 'Price List' form contains several input fields: 'Name', 'Description', 'Currency' (set to 'USD'), 'Effective Dates' (set to '26-JAN-2001'), 'Freight Terms', 'Comments', 'Active' (checked), 'Round To' (set to '-2'), 'Payment Terms', and 'Freight Carriers'. Below the form are three tabs: 'List Lines', 'Secondary Price List', and 'Qualifiers'. The 'Qualifiers' tab is selected, displaying a table with the following columns: 'Grouping Number', 'Qualifier Context', 'Qualifier Attribute', 'Precedence', and 'Operat'. The first row of the table has '1' in the 'Grouping Number' column and '=' in the 'Operat' column. A 'Copy Group' button is located at the bottom right of the window.

2. You can either enter qualifiers or attach qualifier groups:
  - To enter qualifiers, perform steps 3 and 5.
  - To attach qualifier groups, perform steps 4 and 5
3. To enter qualifiers.
  - Enter Grouping Number. Qualifiers with the same grouping number generate an AND condition and qualifiers with different grouping numbers generate an OR condition.
  - Enter Qualifier Context.
  - Enter Qualifier Attribute.
  - Enter Operator, Value From, and Value To.

---

---

**Note:** Some qualifiers use large valusets, for example, those based on all customers. For the Value From and Value To fields, if you want to reduce the number of items that display in the list of values:

- Enter search criteria in the field
- Click the list of values indicator

If you do not enter search criteria and click the list of values indicator, you see a window which advises that you have not entered search criteria and that the search may take a long time:

- If you want to see a reduced list of values display, click No, enter search criteria, and click the list of values indicator
- If you want to see the entire list of values display, click Yes.
- If you do not want to see the list of values, click Cancel.

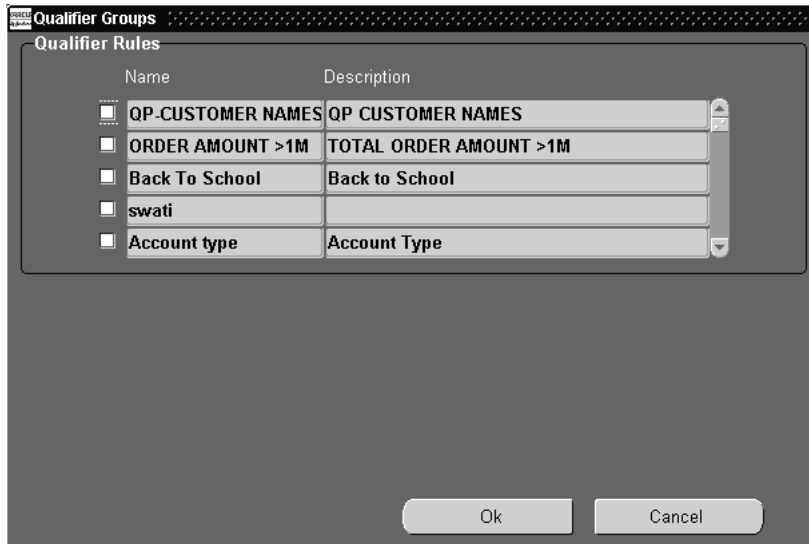
Set the profile option QP: Valueset Lookup Filter to avoid this message.

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- Enter Start Date and End Date.
4. To attach qualifier groups, select Copy Group.

**Figure 6–6 Qualifier Groups**



The Qualifier Groups window appears.

- Select the qualifier groups that you want to attach. All the qualifiers that are associated with the group will be displayed.

---

**Note:** Attend to the grouping numbers to verify that the window displays the correct combination of AND and OR conditions

---

For more information on qualifiers, see Oracle Pricing, Creating Qualifier Groups.

5. Save your work.

### Querying Price List Lines

When querying price list lines, use the Find Price List Lines query window (from the toolbar Find icon) to find specific price list lines. You provide the product attribute context (for example, Item), product attribute (for example, Item Number), and product attribute value (for example, Product A).

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**Note:** If you search using the Find Price List Lines window instead of using a query-by-example on the Price Lists form, you may reduce the time that you need to wait for the search results.

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## **Deleting Price List Information**

Use this process to delete price lists.

### **►► To delete price list information**

You cannot delete price lists and price list lines. To make price list or price list lines ineffective, change the effective dates.

## Copying a Price List

Use this process to create a new price list or add items to an existing price list by copying from an existing price list.

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**Note:** This function is only effective on effective price lists.

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### ►► To copy a price list

1. Navigate to the Copy Price List window.

**Figure 6–7 Copy Price List**

The screenshot shows a window titled "Copy Price List" with two main sections: "Copy From" and "Copy To".

**Copy From:**

- Price List: CORPORATE
- Currency: USD
- Description: Corporate Price List
- Items: [Empty field]
- Item Category Set: [Empty field]
- Item Category: [Empty field]
- Include Discounts
- Retain Effective Dates

**Copy To:**

- Price List: Corporate 2
- Description: Backup
- Effective Dates: [Empty field] - [Empty field]

At the bottom, there is a "Request ID" field and a "Submit" button.

The Copy Price List window appears.

2. Move to the Copy From region.
3. Select the price list you want to copy. The price list can be either type Standard (PRL) or type Agreement (AGR).

Currency and Description display.

Perform either or both of steps 4 and 5 to select the items that you want added to the price list.

4. Enter a range of items to add.

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---

**Note:** You cannot use wild cards when you specify the beginning and ending item numbers.

---

---

5. Select an item category and item category set to limit the items to add. When you add items from an item category, the process adds all items of the item category to the price list; it does not add the item category.

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---

**Note:** You must enter both Item Category Set and Item Category for this criteria to be effective.

---

---

6. Select Include Discounts to instruct the process to copy discounts.
7. Select Retain Effective Dates to instruct the process to copy the effective dates of price list lines.

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**Note:** The process does not copy the effective dates of the price list. You specify the effective dates for the new price list.

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8. Move to the Copy to region.
9. Enter the Name of the new price list. The price list can be either type Standard (PRL) or type Agreement (AGR).
10. Enter the Description of the new price list.
11. Enter the Effective Dates of the new price list.
12. Click Submit. The request ID is displayed in the Request ID field.

## Adjusting a Price List

Use this process to adjust the prices on price lists.

### ►► To adjust a price list

1. Navigate to the Adjust Price List window.

**Figure 6–8** Adjust Price List

The screenshot shows a software window titled "Adjust Price List". At the top, there are three input fields: "Price List" containing "CORPORATE", "Currency" containing "USD", and "Description" containing "Corporate Price List". Below this is a section titled "Item Prices to Adjust" which contains five input fields: "Items", "Item Category Set", "Item Category", "Item Status", and "Creation Date". At the bottom of the window, there is an "Adjust By" dropdown menu set to "Amount" with a value of "2.00" next to it, a "Request ID" input field, and a "Submit" button.

The Adjust Price List window appears.

2. Select the price list you want to adjust.

Currency and Description display.

Perform any or all of steps 3-6 to select the items that you want added to the price list.

3. Enter a range of items to add.

---

---

**Note:** You cannot use wild cards when you specify the beginning and ending item numbers.

---

---

4. Select an item category and item category set to limit the items to add. When you add items from an item category, the process adds all items of the item category to the price list; it does not add the item category.

---

---

**Note:** You must enter both Item Category Set and Item Category for this criteria to be effective.

---

---

5. Enter an item status to limit the items to add.
6. Enter a creation date to limit the items to add. Pricing adjusts only the items added to the price list on that date.
7. Select Percent or Amount for Adjust By, as follows:
  - Percent: The process increases or decreases Operand by a percentage.  
Enter the percentage in the second field.
  - Amount: The process increases or decreases Operand by a fixed amount.  
Enter the fixed amount in the second field.
8. Choose the Submit button. The request ID is displayed in the Request ID field.

## Adding Items to a Price List

Use this process to add items from the item master file to price lists.

You must first define a price list header.

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**Note:** Pricing submits a concurrent process when you add inventory items. The concurrent process only adds new items to a price list; it does not replace existing items, even if the existing items are ineffective.

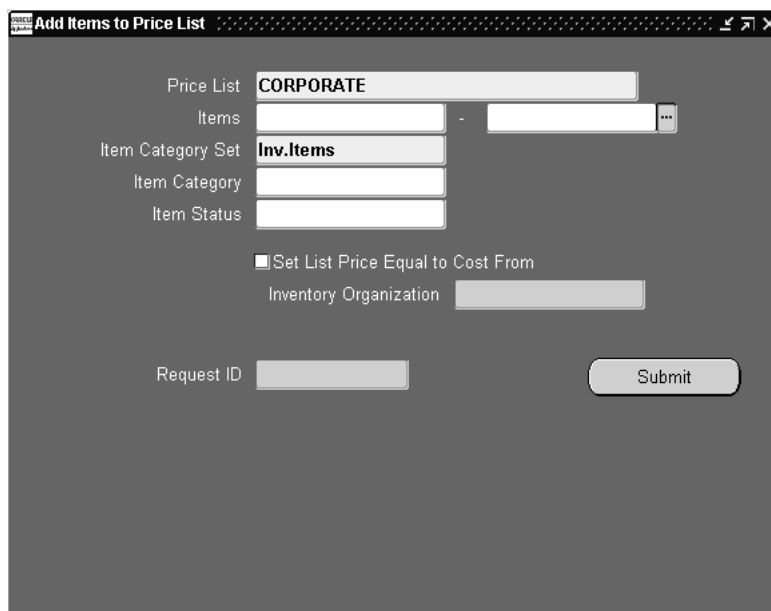
---

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### ►► To add items to a price list

1. Navigate to the Add Items to Price List window.

**Figure 6–9** Add Items to Price List



The screenshot shows a window titled "Add Items to Price List". The window contains the following fields and controls:

- Price List:** A text field containing the value "CORPORATE".
- Items:** A text field with a search icon (magnifying glass) on the right.
- Item Category Set:** A dropdown menu with the selected value "Inv.Items".
- Item Category:** An empty text field.
- Item Status:** An empty text field.
- Set List Price Equal to Cost From:** An unchecked checkbox.
- Inventory Organization:** An empty text field.
- Request ID:** An empty text field.
- Submit:** A button located at the bottom right of the window.

The Add Items to Price List window appears.

2. Select the price list to add items.

Perform any or all of steps 3-5 to select the items that you want added to the price list.

3. Enter a range of items to add.

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---

**Note:** You cannot use wild cards when you specify the beginning and ending item numbers.

---

---

4. Select an item category and item category set to limit the items to add. When you add items from an item category, the process adds all items of the item category to the price list; it does not add the item category.

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---

**Note:** You must enter both Item Category Set and Item Category for this criteria to be effective.

---

---

5. Enter an item status to limit the items to add.
6. Select Set List Price Equal to Cost From if you have Oracle Inventory installed and you want to set the list price of the inventory item equal to its cost.

---

---

**Note:** The list price becomes zero if:

- You clear List Price Equal to Cost From
  - Inventory Organization does not use the standard costing method
- 
- 

7. Enter Inventory Organization to limit the source of the items to add to those in the organization. If you do not specify an organization, the process uses the organization specified in the profile option QP\_ORGANIZATION\_ID.
8. Choose the Submit button. The request ID is displayed in the Request ID field.

## Creating a GSA Price List

Use this process to create a GSA price list.

GSA Price List enables you to define a GSA Price List for your GSA customers. The GSA Price List actually uses the modifiers form and uses the new price. You create a discount that adjusts the base price of the item to the GSA price.

You can setup multiple GSA price lists that are effective during the same time period.

### To create a GSA price list

1. Navigate to the Define Modifier - Define GSA Price window.

**Figure 6–10 Define Modifier - GSA Price List**

Modifier No	Level	Modifier Type	Start Date	End Date	Print On Invoice
1	Line	Discount			<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

The Define Modifier - Define GSA Price window appears.

---

**Note:** GSA Price List actually uses the Define Modifiers form to set up your GSA prices.

---

2. In the Main tabbed region, enter Discount List in Modifier List Type.
3. GSA price list is effective.

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**Note:** For OR conditions, create each qualifier with a different grouping number.

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4. Enter a description of the GSA price list in Description.
5. In the Modifiers Summary tabbed region, enter a modifier number as an identifier for the GSA price list.
6. Level defaults to Line.
7. Modifier Type defaults to discount.
8. Enter the start date and end date of this GSA price list line.

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**Note:** Start date and end date on the discount line must be between the start date and end date of the GSA price list. The pricing engine uses the discount line dates to determine if this line is effective.

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9. Phase defaults to List Line Adjustment.
10. Incompatibility defaults to Exclusive.
11. Bucket defaults to 1.
12. Enter Item Number in Product Attribute.
13. Enter the item number in Product Attribute Value.
14. Enter Precedence.
15. Enter the item unit of measure.
16. In the Discounts/Charges tabbed region, Application Method defaults to Newprice.
17. Enter the item price in Value.
18. Save your work.

### ►► To create GSA list qualifiers

You can attach multiple GSA customers as qualifiers to a GSA Price List.

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**Note:** You can only attach customers only at the list level. You cannot assign line level qualifiers.

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**Warning!** Do not change the qualifier flexfield sequence for the GSA qualifier in the flexfield setup.

---

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1. Click List Qualifiers.  
Perform steps 2-10 for each customer with which you want to qualify the GSA price.
2. Enter Grouping Number.

---

---

**Note:** Since Qualifier Context is Customer, make OR conditions by creating each qualifier with a different grouping number.

---

---

3. Select either Customer or Modifier List for Qualifier Context.
4. Enter Qualifier Attribute. Use a price list, customer, or customer site.
5. Enter Operator, Value From, and Value To.
6. Enter the start date and end date during which the Qualifier Context defaults to Customer.
7. Qualifier Attribute defaults to Customer Name.
8. Precedence defaults from the item segment of the descriptive flexfield.
9. Enter customer name in Value From.
10. Enter start date and end date for the customer.
11. Save your work.

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---

**Note:** The start and end dates of the list qualifiers must be within the start and end date of the modifier list.

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# 7

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## Agreements

This chapter describes agreements and includes the topic  
Overview of Creating Agreements on page 7-2.

## Overview of Creating Agreements

Oracle Pricing allows you to establish agreements with your customers that define the prices, payment terms, and freight terms that you negotiate. You can:

- Define your agreements using customer part numbers and inventory item numbers.
- Make revisions to the original terms and maintain these changes and their reasons under separate revision numbers.
- Attach an already existing price list to the agreement or define new prices.
- Assign optional price breaks by quantity. Price lists are exclusive by agreement.
- Set effectivity dates for agreement terms.
- Set payment terms including invoice rule and accounting rule.
- Set freight terms including the freight carrier.
- Apply agreement terms to sales orders by reference agreements.

### Types of Agreements

There are two methods by which you can manage agreements:

- Standard agreements
- Pricing agreements

Refer the table for a comparison of the two methods.

**Table 7–1 Standard Agreements vs. Pricing Agreements**

<b>Standard Agreements</b>	<b>Pricing Agreements</b>
Agreement lines not allowed.	Agreement lines required.
Associated with standard price list (type PRL).	Associated with agreement price list (type AGR).
Maintain and view price list lines through price list form.	Maintain and view price list lines through agreement form.
Use each standard price list with multiple standard agreements and to price orders not associated with an agreement.	Use each agreement price list with multiple pricing agreements. Not usable to price orders not associated with an agreement.
Cannot revise price list lines using agreement form.	Can revise price list lines using agreement form.

**Table 7–1 Standard Agreements vs. Pricing Agreements**

Standard Agreements	Pricing Agreements
Agreement number not automatically created as a qualifier for the associated price list.	Agreement number automatically created as a qualifier for the associated price list. You can only use it to specify the pricing agreement on the order line.

Choose agreement types as follows:

- Standard: Use to offer a negotiated price for an item to a customer.
- Pricing: Use when, for example, you want to have one price list for all customers but to default special terms onto a sales order for a specific customer.

## Creating Agreements

Use this process to create agreements.

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**Note:** The Agreement field does not display by default on the Oracle Order Management order header. You must use folder technology to show it.

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### ►► To create a price agreement

1. Navigate to the Pricing Agreements window.

**Figure 7–1 Pricing Agreements**

The screenshot shows a software window titled "Pricing Agreements" with three tabs: "Agreement", "Pricing", and "Payment". The "Agreement" tab is active. The form contains the following fields:

- Agreement Name: [Empty text box]
- Agreement Number, Revision: [Empty text box] | 1
- Revision Date: 26-JAN-2001
- Revision Reason: [Empty text box]
- Customer: [Empty text box]
- Cust Number: [Empty text box]
- Agreement Type: [Empty text box]
- Contact: [Empty text box]
- Effective Dates: 26-JAN-2001 | 26-JAN-2003
- Sales Person: [Empty text box]
- Purchase Order: [Empty text box]
- Signature Date: 26-JAN-2001 [ ]

Below the form is a table with the following columns:

Customer Item	Address	Address Category	Product Value	UOM	Primary UOM
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

At the bottom of the window are two buttons: "Price Breaks" and "Pricing Attributes".

The Pricing Agreements window appears.

2. In the Agreement tabbed region, enter an agreement name in Agreement Name.
3. Enter an agreement number in Agreement Number.

4. Enter a revision number in Revision

---

---

**Note:** If you want to create a revision:

- Retrieve the current revision.
  - Change the ending effective date of the current revision to the appropriate date because different revisions of the same agreement cannot have overlapping start or end dates.
  - You cannot create a revision for an agreement unless the current version has effectivity dates. If the current revision does not have effectivity dates, add them now and save your work.
  - Clear the window.
  - Enter the same agreement name, the same agreement number, and a new revision number as if you are creating a new agreement.
- 
- 

5. Select a revision date in Revision Date.

The revision date defaults to the current date.

6. Enter the customer name in Customer. The customer number displays in Cust Number.

7. Select an agreement type in Agreement Type.

8. Enter a contact in Contact.

9. Enter effectivity dates in Effective Dates. They effectivity period defaults from the current date to two years from the current date.

10. Enter a salesperson name in Sales Person.

11. Enter the customer's purchase order number in Purchase Order.

12. Enter the purchase order signature date in Signature Date.

13. Select the Pricing tabbed region.

**Figure 7–2 Pricing Agreements**

The screenshot shows a software window titled "Pricing Agreements" with three tabs: "Agreement", "Pricing", and "Payment". The "Pricing" tab is selected. The form contains the following fields:

- Price List: Business World
- Currency: USD
- Rounding Factor: -2
- Description: Price List for Business World
- Freight carrier: (empty)
- Freight Terms: (empty)
- Comments: (empty)

The Pricing Tab window appears.

14. Select the price list type in Price List Type:

- To create a standard agreement, choose Standard Price List
- To create a pricing agreement, choose Agreement Price List.

15. Choose a Price List:

- For Standard Agreements: Choose from the list of values of existing standard price lists. These price lists were created using the Price List Setup form. The Currency, Rounding Factor, Description, and Comments fields will all default from the standard price list. This information cannot be changed on the Agreements header form.
- For Pricing Agreements: You can create a new price list name or choose from an existing list of values of Pricing Agreement Price Lists.

---

---

**Note:** Pricing agreement price list are maintained only via the Pricing Agreements Form. Pricing Agreement Price lists cannot be adjusted or modified as can Standard Price Lists.

---

---

Perform steps 16-21 if you are creating a pricing agreement.

---

---

**Note:** If you choose an existing Pricing Agreement Price List, the Currency, Rounding Factor, Description, Freight Carrier, Freight Terms and Comments fields will all default from the attached price list. You are able to change the values in these fields, but this will then change this information in all Pricing Agreements that use this Price List.

---

---

16. Select a currency in Currency.
17. Enter a rounding factor in Rounding Factor.
18. Enter a description for the price list in Description.

You can perform steps 19-20 for a standard agreement as well as a pricing agreement

19. Enter a default freight carrier in Freight carrier.
20. Enter default freight terms in Freight Terms.
21. Enter a comment in Comments.

22. Select the Payment tabbed region.

**Figure 7–3 Pricing Agreements**



The Payment Tab window appears

23. Select payment terms in Payment Terms
24. Enter the bill-to name in Invoice To.
25. Enter the bill-to address in Address.
26. Enter the bill-to contact in Invoice Contact.
27. In the Payment tabbed region, Rules region, enter an accounting rule in Accounting Rule.

28. Enter an invoicing rule in Invoicing.

---

---

**Note:** Create the accounting and invoicing rules in Oracle Receivables.

---

---

29. To set the accounting rule override flag, in the Override Flag region, select Accounting Rule.
30. To set the invoicing rule override flag, in the Override Flag region, select Invoicing Rule.

To create agreement lines:

- <sup>2</sup> For Standard Agreements: The agreement line details will default from the Standard Price List that was entered in the Price List field in the Pricing tab. These fields cannot be changed or additional lines cannot be entered from the Agreement Lines. Changes and additional price list lines must be made on the Price List from the Price List Set form.
- <sup>2</sup> For Pricing Agreements: Perform steps 16-30 for each item that you want to add to the price list.

---

---

**Note:** If you attached an existing Pricing Agreement Price List, the agreement lines will be defaulted from that Price List. You are able to make changes to the agreement line details, and add additional agreement lines. Any changes or additions that you make will be reflected on the other agreement lines that this price list is attached to.

---

---

31. In the lowest region of the form, enter a customer item number in Customer Item. Customer item is a pricing attribute.

---

---

**Note:** When you enter a customer item, Oracle Pricing creates one pricing attribute and one product attribute for the agreement line for the customer item and its corresponding internal inventory item.

---

---

32. Enter a customer address in Address.
33. Enter a customer address category in Address Category.
34. Enter an inventory item number in Product Value.

---

---

**Note:** You cannot enter an item category in Product Value.

If you entered a customer item which is associated with more than one inventory item, you must select the correct inventory item for the agreement line.

---

---

35. Enter a unit of measure in UOM.
36. Select Primary UOM if this price list line unit of measure is the primary pricing unit of measure for the item. The pricing engine uses the primary pricing unit of measure and the Oracle Inventory unit of measure conversion information to price an order whose unit of measure does not have a price list line. For example, a price list has two price list lines for item A11111, one with unit of measure EA, the primary UOM, and one for boxes. When the pricing engine receives an order in unit of measure CS, it accesses the unit of measure conversion tables to convert CS to EA.
37. Select Price List Line in Line Type.
38. Select Unit Price for Application Method
39. Enter base price in Value.
40. Enter the effectivity dates in Start Date and End Date. They should be within the effectivity dates of the agreement.
41. Enter a comment in Comments.
42. Enter a revision number in Revision.

---

---

**Note:** This revision number is not dependent on the agreement revision number.

---

---

43. Enter a revision reason in Revision Reason. You must create a list of reasons before you use this field.
44. Enter the revision date in Revision Date.
45. Save your work.

## ▮▮ To define pricing attributes

1. Choose the Pricing Attributes button from the lowest region of the window.

**Figure 7–4 Pricing Attributes**

Product Context	Product Attribute	Product Value	Pricing Context	Pricing Attribute
Item	Item Number	AS54888		...

Product Context, Product Attribute and Product Value are defaulted from the Agreement Line that you are entering the Pricing Attribute

2. Enter a pricing context in Pricing Context.
3. Enter a pricing attribute in Pricing Attribute.
4. Enter values in Value From

---



---

**Note:** You cannot enter Value To and Operator in the Pricing Attributes window.

---



---

5. Save your work.

---



---

**Note:** The pricing attributes are joined as AND conditions since they apply to one price list line.

---



---

## ▮▮ To define price breaks

Follow steps 16-29 above for entering an agreement line with the following exceptions:

1. Enter Price Break Header in Line Type.
2. Enter Point or Range in Price Break Type
3. Choose the Price Breaks button from the lowest region of the form. The Price Breaks Button is enabled only when you select the Price Break Header in Line Type on the agreement line.

**Figure 7–5 Price Breaks**

Pricing Context	Pricing Attribute	Value From	Value To	Price
Volume	Item Quantity	100	500	2

Perform the remainder of the steps for each price break that you want to define.

Pricing Context defaults to Volume and Pricing Attribute defaults to Item Quantity; Application Method value defaults to unit price. These values cannot be changed.

4. Enter the Value From.
5. Enter the Value To.
6. Enter the list price in Price.
7. Save your work.

For more information on creating price breaks, see Oracle Pricing, Modifiers.

### Querying Agreements

When querying agreements, use the Find Agreements query window (from the toolbar Find icon) to find agreements for a specific Customer, Customer Number, Agreement Name,

Agreement Number, Agreement Contact, Agreement Type, Invoice Name, Invoice Contact, Price List, or Salesperson. Use the toolbar Find icon.

---

---

**Note:** If you search using the Find Agreements window instead of using a query-by-example on the Agreements form, you may reduce the time that you need to wait for the search results.

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## Default Attribute Sourcing Rules

This chapter describes the functionality surrounding default sourcing rules for qualifier and pricing attribute values. Defaulting sourcing rules are used by Oracle Pricing for binding attribute values for attributes that have been defined in a qualifier or pricing context. For a given order, the Pricing Engine must receive the values of the attributes defined in the qualifier and pricing contexts in order to determine which offers the order is qualified for.

The following topics are included:

Defaulting Setup for Qualifier and Pricing Attributes on page 8-2

Default Validation Conditions Template on page 8-5

Default Sourcing Rules on page 8-8

## Defaulting Setup for Qualifier and Pricing Attributes

You can use attributes in Oracle Pricing in the following ways:

- Sourced: Attributes which map from data already present in Oracle Pricing, other Oracle Applications, and data in external systems.
- Non-sourced: Attributes which capture data from user input through descriptive flexfields.

This section describes the setup of sourced attributes and the Non-Sourced Attribute Mapping Setup section describes the setup of non-sourced attributes.

### ►► To enter a sourced attribute

This window allows the user to query up entities and attributes for which defaulting conditions and defaulting rules can be updated. You cannot create new records here.

---

---

**Warning:** Qualifier and pricing attribute segments 1-30 of each context are reserved for future use. Do NOT map any default sourcing rules to these attributes.

---

---

1. Navigate to the Attribute Mapping window.

Figure 8–1 Defaulting Setup

Application **Oracle Pricing**

Entity **Line Pricing Attrs**

Defaulting Condition Templates...

**Attributes**

Defaulting Sequence	Attribute	Include in Building Defaulting Conditions
50	PRICING_ATTRIBUTE1	<input type="checkbox"/>
50	PRICING_ATTRIBUTE10	<input type="checkbox"/>
50	PRICING_ATTRIBUTE100	<input type="checkbox"/>
50	PRICING_ATTRIBUTE11	<input type="checkbox"/>
50	PRICING_ATTRIBUTE12	<input type="checkbox"/>
50	PRICING_ATTRIBUTE13	<input type="checkbox"/>
50	PRICING_ATTRIBUTE14	<input type="checkbox"/>

Defaulting Rules...

The Defaulting Setup, Entity window appears.

2. The Application field displays the current application context. For Oracle Pricing, the value is “Oracle Pricing”. This field is non updateable.

3. The Entity field displays the name of the object for which defaulting rules and conditions are being defined. For Oracle Pricing, you have the following 4 options:

- Header Pricing Attributes
- Line Pricing Attributes
- Header Qualifier Attributes
- Line Qualifier Attributes

Each entity has 100 Pricing or Qualifier attributes associated with it. The different entities can be used to distinguish attribute mapping rules for pricing contexts and qualifier context as well as line versus header pricing. This field is non updateable.

**Note:** There is currently no functionality surrounding Header Pricing Attributes.

4. The Attributes Region displays all the entity attributes for which defaulting rules can be defined. You are currently NOT allowed to enter new records here.
5. The Defaulting Sequence field allows a user to assign the sequence number in which this attribute should be defaulted. This field is currently not used with Oracle Pricing.
6. The Attribute field stores the name of available attributes. Values are currently defaulted based upon the entity selected.
  - The Defaulting Condition Templates Button allows you to define defaulting conditions for the application\entity combination displayed on the defaulting rules setup form. Selecting this button will take you to the Defaulting Validation Condition Templates window. For more information defining or updating defaulting validation condition templates, see Oracle Pricing, Defaulting Validations Conditions Template section.
  - The Defaulting Rules Button allows users to define defaulting rules for the attribute selected. Selecting this button will take you to the Define Defaulting Rules window. For more information on defining or updating defaulting sourcing rules, see the Default Sourcing Rules section.

## Default Validation Conditions Template

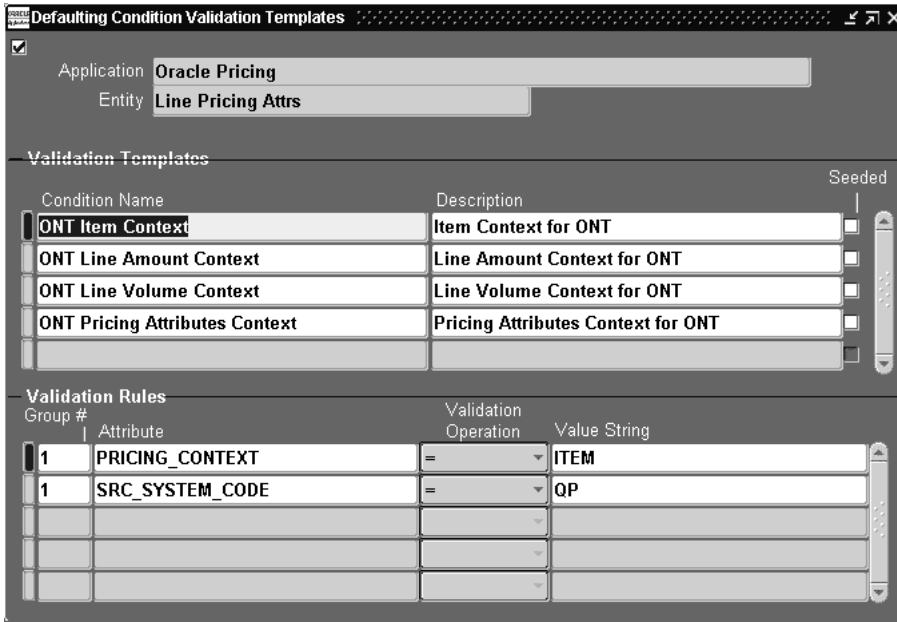
Oracle Pricing uses defaulting sourcing rules as a way to bind attribute values to qualifier or pricing contexts. Defaulting conditions enable users to control which defaulting sourcing rule to use for a particular qualifier or pricing context when the pricing engine is determining eligibility and/or benefit or price options. Defaulting Conditions map to the qualifier and pricing contexts that have been setup in the descriptive flexfield definitions.

You must define all valid qualifier or pricing contexts as conditions in the default validation conditions template before you can select and associate the condition name with a default sourcing rule.

### ►► To enter a new condition, or update an existing condition:

1. Navigate to the Attribute Mapping window.
2. In the Application and Entity field, select the appropriate application and entity combination you would like to define or update the default validation conditions template for.
3. Select the Default Condition Template button.

**Figure 8–2 Defauling Conditions Template**



The Default Conditions Validation Template window appears.

---

**Note:** There is one default validation conditions template for each Application\Entity combination. The template that appears after selecting the Default Condition Template button is based upon current values displayed in the Application and Entity field on the Defaulting Step screen.

---

4. Defaulting conditions enable users to control how an attribute is sourced. Select an existing condition name if you wish to update the associated validation rules or add a new condition name with associated validation rules. The name should reflect which source system will be using this condition as well as the name of the pricing or qualifier context. Multiple conditions can be setup for each context as long as each condition is for a different source system.
5. In the Description field, enter a brief description of the condition.
6. The seeded field is not currently used by Oracle Pricing.

7. In the Validation Rules Region, enter the validation rules based on the attribute values of the above object.
8. In the Group Number field:
  - For conditions that should together evaluate to TRUE (AND conditions), enter the same group number.
  - For conditions that should together evaluate to OR (OR conditions), enter different number for each record. SRC\_SYSTEM\_CODE and PRICING\_CONTEXT or QUALIFIER\_CONTEXT should have the same group number.
9. In the Attribute field, enter the attribute name. Only available choices are:
  - SRC\_SYSTEM\_CODE.
  - PRICING\_CONTEXT or QUALIFIER\_CONTEXT (based upon current values displayed in the Application and Entity field).
10. In the Validation Op field, Oracle pricing currently only allows values to be equal. Chose “=”.
11. For Oracle Pricing, the value string for SRC\_SYSTEM\_CODE should be a valid source system code from QP\_PRICE\_REQ\_SOURCES. The value string for PRICING\_CONTEXT or QUALIFIER\_CONTEXT should be a valid context name that is defined in the flexfield definition. For PRICING\_CONTEXT or QUALIFIER\_CONTEXT the value string field is a LOV based on the contexts defined the flexfield definitions for pricing and qualifier contexts.
12. Save you work.

## Default Sourcing Rules

### ►► To enter or update an existing default sourcing rule:

1. Navigate to the Attribute Mapping window.

*Figure 8–3 Attribute Defaulting Rules*

Application: **Oracle Pricing**

Entity: **Line Pricing Attrs**      Attribute: **PRICING\_ATTRIBUTE1**

**Defaulting Conditions**

Precedence	Defaulting Condition	Seeded
1	ONT Item Context	<input type="checkbox"/>
2	ONT Line Volume Context	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

**Default Sourcing Rules**

Sequence	Source Type	Default Source/ Value	Seeded
1	PL/SQL API	OE_ORDER_PUB.G_LINE?inventory_item_id..	<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

The Attribute Defaulting Rules window appears.

2. In the Application and Entity field, select the appropriate application and entity combination you would like to define or update the default sourcing rule for.
3. In the Attribute field, select the appropriate attribute you wish to define or update.
4. Select the Default Rules button

1. In the Defaulting Conditions region, Precedence Field, enter a unique numeric value for each context you wish to add

---

**Note:** The definition for the term “Precedence” when referring to default sourcing rules is simply a unique, numeric value. Each defaulting condition you wish to define must have a unique value.

There is no relationship between the Precedence field on this form and the term “Precedence Number” used when referring to defining default pricing or qualifier attributes.

---

2. In Defaulting Conditions field, select a condition defined within the Default Conditions Validation Template window.
3. In the Default Sourcing Rules Region, Sequence field, for Oracle Pricing sourcing rules, enter the number 1, since there should only be one source value for a given condition.
4. In the Default Sourcing Rules Region, Source type, select the defaulting source type and enter the source value. Valid values are associated meanings are displayed in Table 8.1.

**Table 8–1 Defaulting Rules Source Types**

Source Type	Meaning
Application Profile	Select the application profile from where you wish to get the default value from
Constant	Enter a constant value that will always be mapped to this attribute for the given condition

**Table 8–1 Defaulting Rules Source Types**

Source Type	Meaning
PL/SQL API	<p>This source type can be used in two ways:</p> <ol style="list-style-type: none"> <li>1. You can write a custom API (must be a function that returns a single value) to get a default value if the value cannot be obtained using other source types. If the return value for your custom api is of type NUMBER or DATE, be sure to return the value in canonical format.                      Ex. To get the customer class from the RA_CUSTOMERS table.                      A flexfield window will appear to allow entry of package and function. See figure 8.2 (attribute1 and attribute2 within this pop up window are not used - <b>do not enter a value in these fields</b>)</li> <li>2. A value can also be sourced directly from a global structure. The flexfield window will appear. In the package name field, the package name of where the global structure is defined should be entered. In the “Function Name” field, the global structure should be entered. If the field in the global structure is of type NUMBER or DATE, be sure to convert the value to canonical format.                      Ex. Package Name: OE_GLOBAL_REC                      Function Name: G_LINE_REC.inventory_item_id</li> </ol>
PL/SQL API Multi-Record	<p>You can write a custom API (must be a function) that returns multiple values. The output of your function can only be a table of VARCHAR2. If the return values for your custom api is of type NUMBER or DATE, be sure to return the values in canonical format.                      Ex. To get the inventory categories for an item.                      A flexfield window will appear to allow entry of package and function. (Fields attribute1 and attribute2 within this pop up window are not used - do not enter a value in these fields.)</p>
System Variable	<p>Enter the system variable that will be mapped to the attribute for the given condition. If the system variable is of type DATE or NUMBER, be sure to convert the value to canonical format.                      Ex. SYSDATE</p>

5. In the Default Source/Value field, enter the appropriate information. Valid values will be based upon data selected in the Source Type field

6. The seeded field is not currently used by Oracle Pricing.
7. Save your work.
8. Run the concurrent program Build Sourcing Rules. For more information, see the Reports section.

### Sourced Attribute Example

Sourcing rules setup for a Qualifier Attribute:

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**Note:** This example assumes that a new qualifier context called “Geography” has been defined, along with a qualifier\_attribute1 mapped to qualifier attribute name of “State”. For more information on setting up qualifier contexts, please refer to Oracle Pricing, Setting Up Chapter.

---



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- Example qualifier: Geography Context with Qualifier Attribute 1 =State
- To be used by the Order Management System.

Assume you have created a function called Get\_Customer\_State in a package, “Geography\_Pub”, that returns the state in which the customer resides.

1. Navigate to the Attribute Mapping window and query for the Application Name, “Oracle Pricing” and Entity, “Line Qualifier Attribute”.
2. Navigate to the Default Validation Conditions Template window.
  1. Create a condition name called “ONT Geography Context” with a description. This geography context condition will be used the Order Management System (ONT).
  2. In the Validation Rules region create an entry for an attribute name.
    - SRC\_SYSTEM\_CODE, with a Validation Op of “=” and a Value String of ONT.
  3. Create another entry for attribute name.
    - QUALIFIER\_CONTEXT, with a Validation Op of equal (=) and a Value String of GEOGRAPHY. Both Attributes should have a Group Number of 1.
3. Save and exit the window.
4. Navigate back to the Defaulting Setup window and select Qualifier Attribute 1 from the Attributes region. Then select Defaulting Rules.

- In the Attribute Defaulting Rules window, go to the Defaulting Conditions region and query up the “Geography Context” condition that you created early and enter in a precedence of 1.
5. In the Default Sourcing Rules region, create an entry with a Sequence of 1, a source type of PL/SQL API. For the package name enter “Geography\_Pub” and for the Function Name enter “Get\_Customer\_State”.
  6. Save your work
  7. Execute the concurrent process Build Sourcing Rules.

### **Non-Sourced Attribute Setup**

You can use attributes in Oracle Pricing in the following ways:

- Sourced: Attributes which map from data already present in Oracle Pricing, other Oracle Applications, and data in external systems.
- Non-sourced: Attributes which capture data from user input through descriptive flexfields.

This section describes the setup of non-sourced attributes and the Defaulting Setup for Qualifier and Pricing Attributes section describes the setup of sourced attributes.

#### **►► To enter a non-sourced attribute**

1. Navigate to the Descriptive Flexfield Segments window.  
The Descriptive Flexfield Segments window appears.
2. In Application, bring up the list of values and select Oracle Pricing Contexts.
3. Move to the Context Field Values region and create a new row.
4. Enter Code, Name, and Description for the non-sourced attribute.

**Figure 8–4 Descriptive Flexfield Segments**

Application: **Oracle Pricing** Title: **Pricing Contexts**

Freeze Flexfield Definition Segment Separator: **Period (.)**

**Context Field**

Prompt: **Context Value**  Value Required

Default Value:   Override Allowed (Display Context)

Reference Field:

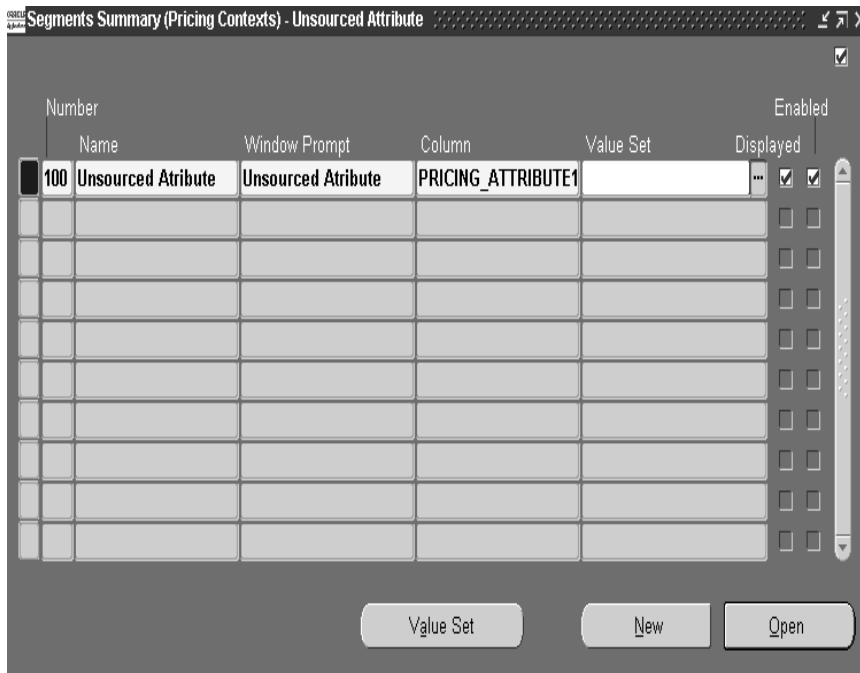
**Context Field Values**

Code	Name	Description	Enabled
Global Data Elements	Global Data Elements	Global Data Element Context	<input checked="" type="checkbox"/>
Un sourced Attribute	Un sourced Attribute	Un sourced Attribute	<input checked="" type="checkbox"/>
CS03755	CS03755	Consulting with Price Rule	<input checked="" type="checkbox"/>
CS11062	CS11062	Consulting with Price Rule	<input checked="" type="checkbox"/>
CS233987	CS233987	Consulting with Price Rule	<input checked="" type="checkbox"/>
CS32698	CS32698	Consulting with Price Rule	<input checked="" type="checkbox"/>

Buttons: **Compile** **Segments**

5. Save your work.
6. Click Segments.  
The Segments Summary window appears.
7. In a new row, enter the Number, Name, and Description for the non-sourced attribute.
8. In Column, select the database column in which the attribute is stored.

**Figure 8–5 Segments Summary**



9. Save your work.
10. Click Open  
The Segments window appears.
11. Enter Description.

**Figure 8–6 Segments**

Segments (Pricing Contexts) - Unsourced Attribute

Name  Description   Enabled

Column  Number   Displayed

**Validation**

Value Set  Description

Default Type  Default Value

Required  Security Enabled Range

**Sizes**

Display Size

Description Size

Concatenated Description Size

**Prompts**

List of Values

Window

**12.** Save your work.

**13.** To validate the non-sourced attribute setup, do the following:

- Create a sales order and verify that the descriptive flexfield displays and that you can enter a value in it. In Oracle Order Management, use the order line tabbed region Pricing.
- Create a formula, add the non-sourced attribute as a component, create a price list line, add the formula to it. Create a sales order, enter a value for the non-sourced attribute, and view the price.



This chapter describes Oracle Pricing reports. Each description includes a sample of the report, a description of the report, and a description of submission parameters. The following reports are included:

Price List Detail Report on page 9-3

Pricing Formulas Report on page 9-5

Qualifier Grouping Report on page 9-6

Build Sourcing Rules on page 9-6

## Overview of Reports

Oracle Pricing offers the following reports to help you review and manage your pricing setup:

- Price List Report
- Pricing Formulas Report
- Qualifier Grouping Report
- Modifier Detail Report
- Accrual Detail Report

Oracle Pricing offers the following concurrent programs

- Build Sourcing Rules: This concurrent program needs to be run BEFORE a new qualifier or source pricing attribute is used for the first time.
- Cross Order Volume Load: This concurrent program is needed to populate Cross Order Volume information.

- Euro Customer Conversion: This concurrent program is needed to convert price lists and modifiers from various European currencies to Euro currency.

### Price List Detail Report

This report displays the following price list information:

- Header
- Qualifiers
- Secondary price lists
- List lines
- Item pricing attributes
- Item price breaks
- Price formulas

### Report Submission

In the Requests window, Name field, select Price Lists.Report Parameters

### Report Parameters

Price List From/Price List To: Enter a price list or a range of price lists.

**Figure 9–1 Parameters**

The screenshot shows a dialog box titled "Parameters" with the following fields and values:

Price List From	[Empty text box with dropdown arrow]
Price List To	[Empty text box]
Start Date Active	[Empty text box]
End Date Active	[Empty text box]
Active Price List Only	Yes
Active Price List Lines Only	Yes
Qualifier Context	[Empty text box]
Qualifier Attribute Value From	[Empty text box]
Qualifier Attribute Value To	[Empty text box]
Product Context	[Empty text box]
Product Attribute	[Empty text box]
Product Attribute Value	[Empty text box]

Buttons at the bottom: OK, Cancel, Clear, Help.

**Start Date Active/End Date Active:** Enter a date or a range of dates.

**Active Price List Only:** Enter Yes to display active price lists only and No to display all price lists. The default is Yes.

**Active Price List Lines Only:** Enter Yes to display active price list lines only and No to display all price list lines. The default is Yes.

**Qualifier Context:** Enter a qualifier context.

**Qualifier Attribute Value From/Qualifier Attribute Value To:** Enter a qualifier attribute value or a range of qualifier attribute values.

**Product Context:** Enter a product context.

**Product Attribute:** Enter a product attribute

**Product Attribute Value:** Enter a product attribute value.

## Pricing Formulas Report

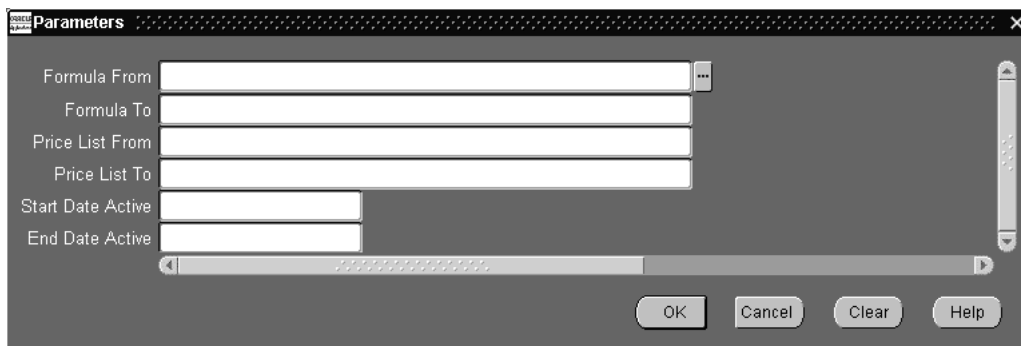
This report displays pricing formulas and their details, including factor lists.

## Report Submission

In the Requests window, Name field, select Pricing Formulas.

## Report Parameters

*Figure 9–2 Parameters*



The screenshot shows a dialog box titled "Parameters" with a close button (X) in the top right corner. The dialog contains six input fields arranged vertically:

- Formula From: A text input field with a dropdown arrow on the right.
- Formula To: A text input field.
- Price List From: A text input field.
- Price List To: A text input field.
- Start Date Active: A date input field.
- End Date Active: A date input field.

At the bottom of the dialog, there are four buttons: "OK", "Cancel", "Clear", and "Help". A horizontal scrollbar is visible below the date fields.

Formula From/Formula To: Enter an individual formula or range of formulas.

Price List From/Price List To: Enter an individual price list or a range of price lists.

Start Date Active/End Date Active: Enter an individual date or a range of dates.

### Qualifier Grouping Report

This report shows details for qualifier groups including grouping conditions and effective dates within the group.

### Report Submission

In the Requests window, Name field, select Qualifier Grouping.

**Figure 9–3 Parameters**



The screenshot shows a dialog box titled "Parameters" with a close button (X) in the top right corner. The dialog contains five input fields and four buttons. The fields are: "Qualifier Context" (with a dropdown arrow), "Qualifier Attribute Value From" (with a greyed-out background), "Qualifier Attribute Value To" (with a greyed-out background), "Start Date Active", and "End Date Active". The buttons at the bottom are "OK", "Cancel", "Clear", and "Help".

**Qualifier Context:** Enter a qualifier context.

**Qualifier Attribute Value From/Qualifier Attribute Value To:** Enter an individual qualifier attribute value or a range of qualifier attribute values.

**Start Date Active/End Date Active:** Enter a date or a range of dates

### Build Sourcing Rules Process

This process generates entries into the `BUILD_CONTEXTS` application program interface (API). You pre-generate entries into this API so that the pricing engine evaluates only the qualifier and pricing attributes used in the price lists, modifiers, and formulas that are relevant to each call rather than all of the sourcing rules.

### Submission

In the Requests window, Name field, select Price Lists.Report Parameters.

Run the process during a time when most users are not logged onto the system. You may encounter a record locking problem if this process runs at the same time that the pricing engine is processing calls.

### Parameters

None

### Recovery

If the process fails:

- The `QP_BUILD_SOURCING_PVT` package becomes invalid
- All subsequent pricing calls fail.

To recover:

- Check the concurrent program log to view any errors. If needed, log into SQL/PLUS and check the errors associated with compiling the `QP_BUILD_SOURCING_PVT` body.

The problems that can occur include:

- You reference an API in a sourcing rule and the API is invalid or does not exist
- You have a typographical error in a sourcing rule that refers to an API or global structure
- Fix the sourcing rule using the Attribute Mapping form.
- Rerun this concurrent process.

### **Euro Customer Conversion Process**

The concurrent process provides the Euro customer conversion solution which is part of the Euro Business support. The concurrent process will copy the existing NCU pricing data like the Price Lists, Modifiers, Formulas and all the associated Attributes and Qualifiers into Euro currency. If a customer is provided as an Input parameter, the concurrent process will also convert all the Open sales orders for that customer into Euro.

For more information on Euro Go To

<http://www.oracle.com/appsnet/products/euro/index.htm>

If you log onto appsnet and go into > Products > Euro, you can select any documentation and collateral. This area is regularly maintained by the Euro team and others); when documents are released they are made available in PDF format.

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## Qualifier Seed Data

### Qualifier Seed Data

This appendix lists the predefined Oracle Pricing Qualifier Contexts and default qualifier attribute sourcing rules.

- \* Table B-1 displays default qualifier contexts information.
- \* Table B-2 displays the default *header* qualifier attribute sourcing mapping information.
- \* Table B-3 displays the default *line* qualifier attribute sourcing mapping information.

**Table A-1 Qualifier Contexts**

Hierarchy Name	Precedence	Qualifier Attribute	Qualifier Attribute data source	Table validated Value Set Name *indicates non table validated value set
Customer	100	GSA	QUALIFIER_ATTRIBUTE15	FND_LOOKUPS
	210	Agreement Name	QUALIFIER_ATTRIBUTE7	OE_AGREEMENTS
	240	Agreement Type	QUALIFIER_ATTRIBUTE8	QP_LOOKUPS
	250	Ship To	QUALIFIER_ATTRIBUTE11	RA_CUSTOMERS, OE_SHIP_TO_ORGS_V
	260	Customer Name	QUALIFIER_ATTRIBUTE2	RA_CUSTOMERS
	270	Site Use	QUALIFIER_ATTRIBUTE5	RA_CUSTOMERS, RA_ADDRESSES_ALL, RA_SITE_USES_ALL, AR_LOOKUPS

**Table A-1 Qualifier Contexts**

<b>Hierarchy Name</b>	<b>Precedence</b>	<b>Qualifier Attribute</b>	<b>Qualifier Attribute data source</b>	<b>Table validated Value Set Name *indicates non table validated value set</b>
Customer (con)	280	Bill To	QUALIFIER_ATTRIBUTE14	OE_INVOICE_TO_ORGS_V, RA_CUSTOMERS
	310	Customer Class	QUALIFIER_ATTRIBUTE1	AR_LOOKUPS
	320	Sales Channel	QUALIFIER_ATTRIBUTE3	OE_LOOKUPS
	340	Account Type	QUALIFIER_ATTRIBUTE12	AR_CUSTOMER_PROFILE_CLASSES_V
	360	Party ID	QUALIFIER_ATTRIBUTE16	HZ_PARTIES
	380	Ship To Party Site	QUALIFIER_ATTRIBUTE17	HZ_PARTIES, HZ_PARTY_SITES, HZ_LOCATIONS
	400	Invoice To Party Site	QUALIFIER_ATTRIBUTE18	HZ_PARTIES, HZ_PARTY_SITES, HZ_LOCATIONS
Orders	440	Customer PO	QUALIFIER_ATTRIBUTE12	OE_ORDER_LINES_ALL, OE_ORDER_HEADERS_ALL
	450	Line Type	QUALIFIER_ATTRIBUTE2	OE_LINE_TYPES_V
	460	Line Category	QUALIFIER_ATTRIBUTE19	OE_LOOKUPS
	470	Order Type	QUALIFIER_ATTRIBUTE9	OE_ORDER_TYPES_V
	480	Order Category	QUALIFIER_ATTRIBUTE13	OE_LOOKUPS
	490	Source Type	QUALIFIER_ATTRIBUTE15	OE_LOOKUPS
	510	Order Date	QUALIFIER_ATTRIBUTE1	QP_DATE *
	520	Request Date	QUALIFIER_ATTRIBUTE17	QP_DATE *
	530	Pricing Date	QUALIFIER_ATTRIBUTE14	QP_DATE *
	540	Ship From	QUALIFIER_ATTRIBUTE18	OE_SHIP_FROM_ORGS_V
	550	Shipment Priority Code	QUALIFIER_ATTRIBUTE16	OE_LOOKUPS
	560	Shippable Flag	QUALIFIER_ATTRIBUTE10	FND_LOOKUPS
	570	Shipped Flag	QUALIFIER_ATTRIBUTE11	FND_LOOKUPS
	580	Freight Cost Type Code	QUALIFIER_ATTRIBUTE20	WSH_LOOKUPS
Modlist	110	List Line Number	QUALIFIER_ATTRIBUTE2	QP_LIST_LINES
	120	Coupon Number	QUALIFIER_ATTRIBUTE3	QP_COUPONS
	130	Promotion Number	QUALIFIER_ATTRIBUTE1	QP_LIST_HEADERS_VL

**Table A-1 Qualifier Contexts**

Hierarchy Name	Precedence	Qualifier Attribute	Qualifier Attribute data source	Table validated Value Set Name *indicates non table validated value set
	140	Price List	QUALIFIER_ATTRIBUTE4	QP_LIST_HEADERS_VL
	670'	Restricted	QUALIFIER_ATTRIBUTE10	QP:Yes ONLY
Terms	640	Freight Terms	QUALIFIER_ATTRIBUTE10	OE_FRGHT_TERMS_ACTIVE_V
	650	Shipping Terms	QUALIFIER_ATTRIBUTE11	OE_SHIP_METHODS_V
	660	Payment Term	QUALIFIER_ATTRIBUTE1	RA_TERMS
Volume	500	Order Amount	QUALIFIER_ATTRIBUTE10	QP_NUMBER *
	590	Period 1 Order Amount	QUALIFIER_ATTRIBUTE12	QP_NUMBER *
	600	Period 2 Order Amount	QUALIFIER_ATTRIBUTE13	QP_NUMBER *
	610	Period 3 Order Amount	QUALIFIER_ATTRIBUTE11	QP_NUMBER *
	620	Line Weight	QUALIFIER_ATTRIBUTE14	QP_NUMBER *
	630	Line Volume	QUALIFIER_ATTRIBUTE15	QP_NUMBER *

**Table A-2 Default Header Qualifier Source Attribute Mapping**

Context	Qualifier Attribute	Source Packagel	Source Function
Customer	QUALIFIER_ATTRIBUTE1	QP_SOURCING_API_PUB	Get_Customer_Class(OE_ORDER_PUB.G_LINE.sold_to_org_id)
	QUALIFIER_ATTRIBUTE12	QP_SOURCING_API_PUB	Get_Account_Type(OE_ORDER_PUB.G_HDR.sold_to_org_id)
	QUALIFIER_ATTRIBUTE13	QP_SOURCING_API_PUB	Get_Sales_Channel(OE_ORDER_PUB.G_HDR.sold_to_org_id)
	QUALIFIER_ATTRIBUTE14	OE_ORDER_PUB	G_HDR.invoice_to_org_id
	QUALIFIER_ATTRIBUTE15	QP_SOURCING_API_PUB	Get_GSA(OE_ORDER_PUB.G_HDR.sold_to_org_id)
	QUALIFIER_ATTRIBUTE16	QP_SOURCING_API_PUB	GET_PARTY_ID(OE_ORDER_PUB.G_HDR.sold_to_org_id)
	QUALIFIER_ATTRIBUTE17	QP_SOURCING_API_PUB	GET_SHIP_TO_PARTY_SITE_ID(OE_ORDER_PUB.G_HDR.Ship_to_org_Id)
	QUALIFIER_ATTRIBUTE18	QP_SOURCING_API_PUB	GET_INVOICE_TO_PARTY_SITE_ID(OE_ORDER_PUB.G_HDR.Invoice_to_org_ID)
	QUALIFIER_ATTRIBUTE2	OE_ORDER_PUB	G_HDR.sold_to_org_id

**Table A-2 Default Header Qualifier Source Attribute Mapping**

Context	Qualifier Attribute	Source Packagel	Source Function
	QUALIFIER_ATTRIBUTE5	QP_SOURCING_API_PUB	Get_Site_Use(OE_ORDER_PUB.G_HDR.ship_to_contact_id)
	QUALIFIER_ATTRIBUTE7	OE_ORDER_PUB	G_HDR.agreement_id
	QUALIFIER_ATTRIBUTE8	QP_SOURCING_API_PUB	Get_Agreement_Type(OE_ORDER_PUB.G_HDR.agreement_id)
Orders	QUALIFIER_ATTRIBUTE1	OE_ORDER_PUB	G_HDR.ordered_date
	QUALIFIER_ATTRIBUTE9	OE_ORDER_PUB	G_HDR.order_type_id
	QUALIFIER_ATTRIBUTE12	OE_ORDER_PUB	G_HDR.cust_po_number
	QUALIFIER_ATTRIBUTE13	OE_ORDER_PUB	G_HDR.order_category_code
Order (con)	QUALIFIER_ATTRIBUTE14	OE_ORDER_PUB	G_HDR.pricing_date
	QUALIFIER_ATTRIBUTE17	OE_ORDER_PUB	G_HDR.request_date
	QUALIFIER_ATTRIBUTE18	OE_ORDER_PUB	G_HDR.ship_from_org_id
	QUALIFIER_ATTRIBUTE20	OE_CHARGE_PVT	GET_COST_TYPES
Terms	QUALIFIER_ATTRIBUTE1	OE_ORDER_PUB	G_HDR.payment_term_id
	QUALIFIER_ATTRIBUTE10	OE_ORDER_PUB	G_HDR.freight_terms_code
	QUALIFIER_ATTRIBUTE11	OE_ORDER_PUB	G_HDR.shipping_method_code
Volume	QUALIFIER_ATTRIBUTE1	QP_SOURCING_API_PUB	Get_Order_Qty(OE_ORDER_PUB.G_HDR.header_id)
	QUALIFIER_ATTRIBUTE10	QP_SOURCING_API_PUB	Get_Order_Amount(OE_ORDER_PUB.G_HDR.header_id)
	QUALIFIER_ATTRIBUTE11	QP_SOURCING_API_PUB	Get_Period3_Order_Amount(OE_ORDER_PUB.G_HDR.sold_to_org_id)
	QUALIFIER_ATTRIBUTE12	QP_SOURCING_API_PUB	Get_Period1_Order_Amount(OE_ORDER_PUB.G_HDR.sold_to_org_id)
	QUALIFIER_ATTRIBUTE13	QP_SOURCING_API_PUB	Get_Period2_Order_Amount(OE_ORDER_PUB.G_HDR.sold_to_org_id)

**Table A-3 Default Line Qualifier Attribute Source Mapping**

Context	Qualifier Attribute	Source Packagel	Source Function
Customer	QUALIFIER_ATTRIBUTE1	QP_SOURCING_API_PUB	Get_Customer_Class(OE_ORDER_PUB.G_LINE.sold_to_org_id)
	QUALIFIER_ATTRIBUTE2	OE_ORDER_PUB	G_LINE.sold_to_org_id
	QUALIFIER_ATTRIBUTE5	QP_SOURCING_API_PUB	Get_Site_Use(OE_ORDER_PUB.G_LINE.ship_to_contact_id)

**Table A-3 Default Line Qualifier Attribute Source Mapping**

Context	Qualifier Attribute	Source Package	Source Function
Customer (con)	QUALIFIER_ATTRIBUTE7	OE_ORDER_PUB	G_LINE.agreement_id
	QUALIFIER_ATTRIBUTE8	QP_SOURCING_API_PUB	Get_Agreement_Type(OE_ORDER_PUB.G_LINE.agreement_id)
	QUALIFIER_ATTRIBUTE11	OE_ORDER_PUB	G_LINE.ship_to_org_id
	QUALIFIER_ATTRIBUTE12	QP_SOURCING_API_PUB	Get_Account_Type(OE_ORDER_PUB.G_LINE.sold_to_org_id)
	QUALIFIER_ATTRIBUTE13	QP_SOURCING_API_PUB	Get_Sales_Channel(OE_ORDER_PUB.G_HDR.sold_to_org_id)
	QUALIFIER_ATTRIBUTE14	OE_ORDER_PUB	G_LINE.invoice_to_org_id
	QUALIFIER_ATTRIBUTE15	QP_SOURCING_API_PUB	Get_GSA(OE_ORDER_PUB.G_LINE.sold_to_org_id)
	QUALIFIER_ATTRIBUTE16	QP_SOURCING_API_PUB	GET_PARTY_ID(OE_ORDER_PUB.G_LINE.sold_to_org_id)
	QUALIFIER_ATTRIBUTE17	QP_SOURCING_API_PUB	GET_SHIP_TO_PARTY_SITE_ID(OE_ORDER_PUB.G_LINE.Ship_to_org_Id)
	QUALIFIER_ATTRIBUTE18	QP_SOURCING_API_PUB	GET_INVOICE_TO_PARTY_SITE_ID(OE_ORDER_PUB.G_LINE.Invoice_to_org_ID)
Order	QUALIFIER_ATTRIBUTE2	OE_ORDER_PUB	G_LINE.line_type_id
	QUALIFIER_ATTRIBUTE10	OE_ORDER_PUB	G_LINE.SHIPPABLE_FLAG
	QUALIFIER_ATTRIBUTE11	OE_CHARGE_PVT	GET_SHIPPED_STATUS
	QUALIFIER_ATTRIBUTE12	OE_ORDER_PUB	G_LINE.cust_po_number
	QUALIFIER_ATTRIBUTE14	OE_ORDER_PUB	G_LINE.pricing_date
	QUALIFIER_ATTRIBUTE15	OE_ORDER_PUB	G_LINE.source_type_code
	QUALIFIER_ATTRIBUTE16	OE_ORDER_PUB	G_LINE.shipment_priority_code
	QUALIFIER_ATTRIBUTE17	OE_ORDER_PUB	G_LINE.request_date
Terms	QUALIFIER_ATTRIBUTE1	OE_ORDER_PUB	G_LINE.payment_term_id
	QUALIFIER_ATTRIBUTE10	OE_ORDER_PUB	G_LINE.freight_terms_code
	QUALIFIER_ATTRIBUTE11	OE_ORDER_PUB	G_LINE.shipping_method_code
Volume	QUALIFIER_ATTRIBUTE11	QP_SOURCING_API_PUB	Get_Period3_Order_Amount(OE_ORDER_PUB.G_LINE.sold_to_org_id)
	QUALIFIER_ATTRIBUTE12	QP_SOURCING_API_PUB	Get_Period1_Order_Amount(OE_ORDER_PUB.G_LINE.sold_to_org_id)

**Table A-3 Default Line Qualifier Attribute Source Mapping**

<b>Context</b>	<b>Qualifier Attribute</b>	<b>Source Packagel</b>	<b>Source Function</b>
	QUALIFIER_ATTRIBUTE14	OE_CHARGE_PVT	GET_LINE_WEIGHT_OR_VOLUME('Weight')
	QUALIFIER_ATTRIBUTE15	OE_CHARGE_PVT	GET_LINE_WEIGHT_OR_VOLUME('Volume')
Modlist	QUALIFIER_ATTRIBUTE4	OE_ORDER_PUB	G_LINE.price_list_id

## Pricing Attribute Seed Data

### Pricing Attribute Seed Data

This appendix lists the predefined Oracle Pricing Contexts and default pricing attribute sourcing rules.

Table A-1 displays default pricing attribute contexts information.

Table A-2 displays the default *line* pricing attribute sourcing mapping information.

**Table B-1 Attribute Contexts**

Hierarchy Name	Precedence	Attribute Name	Attribute data source	Table validated Value Set Name *indicates non table validated value set
ITEM	220	Item Number	PRICING_ATTRIBUTE1	NULL
	290	Item Category	PRICING_ATTRIBUTE2	NULL
	291-311	Segment_1 - Segment_20	PRICING_ATTRIBUTE4 - PRICING_ATTRIBUTE23	NULL
	315	ALL_ITEMS	PRICING_ATTRIBUTE3	QP:ITEM_ALL
LINEAMT	NULL	NULL	NULL	NULL
PRICING ATTRIBUTE	710	Parent Price List	PRICING_ATTRIBUTE10	QP_NUMBER *
	720	Customer Item	PRICING_ATTRIBUTE11	MTL_CUSTOMER_ITEMS, RA_CUSTOMERS, RA_ADDRESSES_ALL
	730	Insurance Cost	PRICING_ATTRIBUTE12	QP_NUMBER *
	740	Handling Cost	PRICING_ATTRIBUTE13	QP_NUMBER *
	750	Export Cost	PRICING_ATTRIBUTE14	QP_NUMBER *

**Table B-1 Attribute Contexts**

Hierarchy Name	Precedence	Attribute Name	Attribute data source	Table validated Value Set Name *indicates non table validated value set
	760	Duty Cost	PRICING_ATTRIBUTE15	QP_NUMBER *
	770	Freight Cost	PRICING_ATTRIBUTE16	QP_NUMBER *
	780	Administrative Cost	PRICING_ATTRIBUTE17	QP_NUMBER *
	782	Grade	PRICING_ATTRIBUTE19	OPM_QC_GRADE
VOLUME	800	Item Quantity	PRICING_ATTRIBUTE10	QP_NUMBER *
	810	Item Amount	PRICING_ATTRIBUTE12	QP_NUMBER *
	820	Period1 Item Quantity	PRICING_ATTRIBUTE3	QP_NUMBER *
	830	Period2 Item Quantity	PRICING_ATTRIBUTE1	QP_NUMBER *
	840	Period3 Item Quantity	PRICING_ATTRIBUTE11	QP_NUMBER *
	850	Period1 Item Amount	PRICING_ATTRIBUTE13	QP_NUMBER *
	860	Period2 Item Amount	PRICING_ATTRIBUTE14	QP_NUMBER *
	870	Period3 Item Amount	PRICING_ATTRIBUTE15	QP_NUMBER *

**Table B-2 Default Line Pricing Attribute Source Mapping**

Context	Qualifier Attribute	Source Package	Source Function
Item	PRICING_ATTRIBUTE1	OE_ORDER_PUB	G_LINE.inventory_item_id
	PRICING_ATTRIBUTE2	QP_SOURCING_API_PUB	Get_Item_Category(OE_ORDER_PUB.G_LINE.inventory_item_id)
	PRICING_ATTRIBUTE3	Constant	ALL
	PRICING_ATTRIBUTE4 - PRICING_ATTRIBUTE23	QP_SOURCING_API_PUB	Get_Item_Segment(OE_ORDER_PUB.G_LINE.inventory_item_id, 4-23)
Line Amt	PRICING_ATTRIBUTE4	QP_SOURCING_API_PUB	Get_Dollars
Pricing Attributes	PRICING_ATTRIBUTE10	OE_ORDER_PUB	G_LINE.unit_percent_base_price
	PRICING_ATTRIBUTE11	QP_SOURCING_API_PUB	Get_Customer_Item_Id(OE_ORDER_PUB.G_LINE.item_identifier_type, OE_ORDER_PUB.G_LINE.ordered_item_id)

**Table B-2 Default Line Pricing Attribute Source Mapping**

Context	Qualifier Attribute	Source Package	Source Function
	PRICING_ATTRIBUTE12	OE_CHARGE_PVT	GET_COST_AMOUNT('INSURANCE')
	PRICING_ATTRIBUTE13	OE_CHARGE_PVT	GET_COST_AMOUNT('HANDLING')
	PRICING_ATTRIBUTE14	OE_CHARGE_PVT	GET_COST_AMOUNT('EXPORT')
	PRICING_ATTRIBUTE15	OE_CHARGE_PVT	GET_COST_AMOUNT('DUTY')
	PRICING_ATTRIBUTE16	OE_CHARGE_PVT	GET_COST_AMOUNT('FREIGHT')
	PRICING_ATTRIBUTE17	OE_CHARGE_PVT	GET_COST_AMOUNT('ADMINISTRATION')
	PRICING_ATTRIBUTE19	OE_ORD_PUB	G_LINE.Preferred_grade
VOLUME	PRICING_ATTRIBUTE1	QP_SOURCING_API_PUB	Get_Period2_Item_Quantity(OE_ORDER_PUB.G_LINE.sold_to_org_id, OE_ORDER_PUB.G_LINE.inventory_item_id)
	PRICING_ATTRIBUTE3	QP_SOURCING_API_PUB	Get_Period1_Item_Quantity(OE_ORDER_PUB.G_LINE.sold_to_org_id, OE_ORDER_PUB.G_LINE.inventory_item_id)
	PRICING_ATTRIBUTE11	QP_SOURCING_API_PUB	Get_Period3_Item_Quantity(OE_ORDER_PUB.G_LINE.sold_to_org_id, OE_ORDER_PUB.G_LINE.inventory_item_id)
	PRICING_ATTRIBUTE13	QP_SOURCING_API_PUB	Get_Period1_Item_Amount(OE_ORDER_PUB.G_LINE.sold_to_org_id, OE_ORDER_PUB.G_LINE.inventory_item_id)
	PRICING_ATTRIBUTE15	QP_SOURCING_API_PUB	Get_Period3_Item_Amount(OE_ORDER_PUB.G_LINE.sold_to_org_id, OE_ORDER_PUB.G_LINE.inventory_item_id)



## Lookups

This appendix lists the predefined Oracle Pricing Lookups.

### **Agreement Type**

*Access Level: Extensible*

Allows the user to optionally categorize agreements by defining unique agreement types. For example, the user could setup an agreement type per contract type, or use the categorization for reporting purposes. An agreement type is optional on a pricing agreement.

The user can choose to use the seeded agreement types or add new types.

**Table C-1 Agreement Type Lookup**

<b>Code</b>	<b>Meaning</b>	<b>Function</b>
GSA	Government Services Agreement	Used to categorize pricing agreements.
STANDARD	Standard Terms and Conditions	Used to categorize pricing agreements.
VPA	Volume Purchase Agreement	Used to categorize pricing agreements.

## Arithmetic Operator

Access Level: System

The method by which a price or modifier is calculated. Used in the Price List and Modifier Setup U.I.'s.

**Table C-2 Arithmetic Operator Lookup**

Code	Meaning	Function
%	Percent	Modifier value is calculated as a per unit percentage of the List Price.
AMT	Amount	Modifier value is calculated as per unit amount +/- the List Price.
LUMPSUM	Lump Sum	Modifier value is a fixed amount, i.e. is not per unit.
NEW PRICE	New Price	Modifier value overrides the selling price.
PERCENT PRICE	Percent Price	List Price is derived as a percentage of an associated item.
UNIT PRICE	Unit Price	List Price is a per unit price.

## Comparison Operator

Access Level: System

Used when setting up Qualifiers and Pricing Attributes to define the rule as to how the search engine should evaluate the attribute on the request line.

**Table C-3 Comparison Operator Lookup**

Code	Meaning	Function
=	Equals	Qualifier/Pricing Attribute value on the incoming request should match the Qualifier/Pricing Attribute value.
BETWEEN	Between	Qualifier/Pricing Attribute value on the incoming request should be in the range defined by the Qualifier / Pricing Attributes.
Not =	Not Equal	Qualifier Attribute value on the incoming request should NOT match the Qualifier Attribute value.

## Currency Precision Type

*Access Level: System*

Valid values for the profile option QP: Unit Price Precision Type. Indicates whether the currencies standard or extended precision should be used.

**Table C-4 Currency Precision Types Lookup**

Precision Type	Rounding Factor
Extended	Rounding Factor is defaulted to the currencies extended precision
Standard	Rounding Factor is defaulted to the currencies standard precision

## Effective Date Types

*Access Level: System*

Effective date ranges of these types can optionally be defined on some types of Modifier Lists. The Search Engine will use these dates, if passed by the calling application, in addition to the pricing effective date to determine which Modifier Lists are eligible.

**Table C-5 Effective Date Type Lookup**

Code	Meaning	Function
ORD	Order Date	Order Date must be within the date range.
SHIP	Requested Ship Date	Customer requested Ship Date must be within the date range.

## Incompatibility Groups

*Access Level: Extensible*

Incompatibility Groups allow the user to define which Modifiers cannot be applied to a request line with which other Modifiers, i.e. are incompatible, and which Modifiers cannot be applied to a request line with any other Modifier, i.e. are exclusive.

All Modifiers in a Phase which are incompatible should be assigned to the same Incompatibility Groups, LVL1 - LVL3, and any Modifier in a Phase which is exclusive should be placed in the EXCL - Exclusive Group.

Users may define additional incompatibility groups, but only the seeded EXCL - Exclusive group is treated as “incompatible with ALL”.

**Table C–6 Incompatibility Groups Lookup**

Code	Meaning	Function
EXCL	Exclusive group	Incompatible with all other Modifiers in a Phase.
LVL1	Level 1 Incompatibility	Incompatible with other Modifiers in this incompatibility group in a Phase.
LVL2	Level 2 Incompatibility	Incompatible with other Modifiers in this incompatibility group in a Phase.
LVL3	Level 3 Incompatibility	Incompatible with other Modifiers in this incompatibility group in a Phase.

## Incompatibility Resolution Code

*Access Level: System*

Methods of deciding which Modifier should be selected when multiple Modifiers in the same incompatibility group are eligible to be applied to a request line in the same pricing phase. The method for resolving incompatibility is specified by pricing phase when maintaining pricing phases in the Event to Phase Mapping Setup Up.

**Table C–7**

Code	Meaning	Function
BEST PRICE	Best Price	Search Engine selects the Modifier which gives the lowest price to the customer.
PRECEDENCE	PRECEDENCE	Search Engine selects the Modifier with the lowest precedence, i.e. the highest specificity.

## List Line Type Code

*Access Level: System*

Defines the behavior of a List Line; a List Line may be a Price List Line or a type of Modifier, i.e. price adjustment, benefit or charge.

**Table C-8 List Line Code Lookup**

Code	Meaning	Function
PRL	Standard Price List Line	Sets the base price of an item or level in product hierarchy.
PBH	Price Break Header	A series of base price or price adjustments which are eligible for application to the pricing request according to a delimited break unit range and the rules of the break type.
PMR	Price Modifier	One or more pricing attributes, whose value or range of values is used to derive a factor on a formula line.
DIS	Discount	Reduces the list price, or selling of the previous pricing bucket, according to the calculation rules of the arithmetic operator.
SUR	Surcharge	Increases the list price, or selling of the previous pricing bucket, according to the calculation rules of the arithmetic operator.
OID	Other item Discount	A discount for which eligibility can be qualified by one or more request lines, but is applied to the same or different request line/s which are on the request.
PMG	Promotional Goods	A discount for which eligibility can be qualified by one or more request lines, but for which a new request line is created for the discounted item.
CIE	Coupon Issue	Creation of a coupon which qualifies for a discount or promotional goods on a future request.
IUE	Item Upgrade	Substitution of one item for another on a request line, according to the pre-defined "promotional Upgrade" relationship between the two items.
TSN	Terms Substitution	Changing value of qualifier attribute in terms context on request line. Seeded qualifier attributes in terms context are Freight, Shipping and Payment Terms.
Freight Charges	Freight and Special Charges	Monetary charges which are calculated based on attributes of a request line, but which do not effect the selling price on the request line.

## List Type Code

*Access Level: System*

Used to categorize the type of list which groups price list lines or modifiers. Used for validation, including which types of lines can be included on the list, and reporting purposes.

**Table C-9 List Type Code Lookup**

Modifier Line Types	Price List	Discount	Surcharge	F&S	Promotion	Deal	Price Modifier
Price List	X						
Agreement Price List	X						
Discount		X			X	X	
Surcharge		X	X		X	X	
Freight Charge				X			
Price Break Header		X	X		X	X	
Item Upgrades					X	X	
Other Item Discount					X	X	
Terms Substitution					X	X	
Promotional Goods					X	X	
Coupon Issue					X	X	
Price Modifier							X

**Modifier Level Code**

*Access Level: System*

Determines what qualifiers and pricing attributes are considered by the search engine when deciding if a request line qualifies for a modifier. This code also determines at what level, i.e. individual line or summary, a modifier should be applied to the request.

**Table C-10 Modifier Level Code Lookup**

Code	Meaning	Function
Line	Line	Line Group
Line Group	Group of lines	The quantity, in the pricing UOM, and amount spent on an item is summed across all request lines. Hence the total item quantity and amount, on the request, or total quantity and amount at a level in the product hierarchy, is considered by the search engine when deciding if a modifier is qualified or not. Modifier application is at the request line level.
Order	Order	Only qualifiers or pricing attributes of the summary request line, or header, are considered by the search engine when deciding if a modifier is qualified. Note: it is not possible for a header level modifier to be qualified by a request line. Modifier application is at the summary request line, or header level.

**Price Break Type Code**

*Access Level: System*

Rules which determine which delimited break unit range/s the qualifying break unit quantity falls into.

**Table C-11 Price Break Type Code Lookup**

Code	Meaning	Function
POINT	Point	Volume break in which each volume of break unit gets price/discount in the break range into which it falls.
RANGE	Range	Volume break in which each volume of break unit gets base price/modifier in the break range within which the <i>total</i> volume falls.
RECURRING	Recurring	Volume break in which the modifier is given <i>for each</i> volume of break unit that falls into the break range. Used for modifiers only.

## Price Formula Line Type Code

*Access Level: System*

Defines the behavior of a formula line. Table C-12 are the defined lookups for basic pricing in OM, and Table C-13 are the lookups defined for Oracle Pricing.

**Table C-12 Price Formula Line Type Code Lookup (Basic Pricing in OM)**

Code	Function	Meaning
ML	Factor List	Formula uses a price modifier list to derive the value for the formula line. A price modifier list is a grouping of price modifier lines, each line having one or more pricing attributes, whose value or range of values is used to derive a factor.
NUM	Numeric Constant	Fixed value
PRA	Pricing Attributes	Formula takes as input the pricing attribute for the item referenced by the formula line.

**Table C-13 Price Formula Line Type Code Lookup (Oracle Pricing Only)**

Code	Function	Meaning
FUNC	Function	Formula uses a function to derive the value for the formula line
LP	Price List Line	Formula takes as input the list price of the price list line to which it is attached
PLL	Price List Line	Formula takes as input the list price from the price list line (any price list line) referenced by the formula line.
PRA	Pricing Attribute	Formula takes as input the pricing attribute for the item referenced by the formula line.
ML	Factor List	Formula uses a price modifier list to derive the value for the formula line. A price modifier list is a grouping of price modifier lines, each line having one or more pricing attributes, whose value or range of values is used to derive a factor.
NUM	Numeric Constant	Fixed value

## Pricing Events

*Access Level: System*

A “point” in the process flow of the transaction system/calling application at which a call is made to the Pricing Engine (analogous to a Workflow Event).

The following seeded lookup codes are for Oracle Order Management integration with pricing; each event represents a stage in the order cycle at which pricing is performed. The information returned by pricing; base prices, price adjustments, promotions, freight charges etc. depends on the pricing phases which are processed for this event.

Note: in this release it is not possible to create new pricing events.

**Table C-14 Pricing Events Lookup**

Code	Meaning	Function
PRICE	Fetch List Price	Calls pricing engine to get base price as user enters item, quantity and unit of measure on the order line.
LINE	Enter Order Line	Calls pricing engine to get line level modifiers as user navigates out of a line or saves the order.
ORDER	Save Order Event	Calls pricing engine, as user saves order, to get order level modifiers and other benefits which depend on multiple order lines.
BOOK	Book Order	Calls pricing engine as order is booked.
SHIP	Enter Shipments	Calls pricing engine as order is shipped.
REPRICE _LINE	Reprice Line	Pricing event which can be used to reprice an order line at any point during the order flow.
BATCH	Batch Processing	Calls pricing engine when orders are processed in batch, replaces 'Line' and 'Order' events.

## Pricing Group Sequence

*Access Level: Extensible*

A Pricing Group Sequence is a mechanism to control the application order of price adjustments and retrospective discounts, i.e. accruals. The sequence of application of these modifiers becomes important when the adjustment or accrual value is derived from the selling price (the price resulting from applying prior price adjustments) rather than the list price. This is known as discounts on discounts or “cascading discounts”. The sequence number of the group determines which order the calculation engine will apply the modifiers.

The pricing group sequence allows the user to place all price adjustments and retrospective discounts in a “pricing bucket”; all modifiers in a “bucket” are additive, i.e. the adjustment amount for all modifiers in a bucket is calculated off the final selling price, or subtotal of the previous bucket.

The user can add additional pricing group sequences / buckets if they require further subtotals or cascading of modifiers. Pricing Group Sequence “0” is reserved for base price calculation.

**Table C–15 Pricing Group Sequence Lookup**

Code	Meaning	Function
0	Base Price	Base Price calculation
1	Price Adjustments Bucket 1	First modifier subtotal
2	Price Adjustments Bucket 2	Second modifier subtotal
3	Price Adjustments Bucket 3	Third modifier subtotal

## Related Modifier Group Type

*Access Level: System*

Used by Oracle Pricing internally to identify relationships between, and functional groupings, of modifiers.

**Table C–16 Related Modifier Group Type Lookup**

Code	Meaning	Function
QUALIFIER	Qualifier	Identifies those modifiers which the request must qualify for in order to get a benefit.
BENEFIT	Benefit	Identifies those modifiers which are given as a benefit once the qualification criteria has been met.

**Table C-16 Related Modifier Group Type Lookup**

<b>Code</b>	<b>Meaning</b>	<b>Function</b>
COUPON	Coupon	Identifies the benefit which is given for a Coupon Issue.
PRICE BREAK	Price Break	Records which modifiers are price break lines for a price break.

## Request Type

*Access Level: Extensible*

A Request Type indicates to the pricing engine the type of transaction being priced. This is important to pricing, as the engine will use this information to only consider data created specifically to price this particular type of transaction.

The following seeded lookup codes are for Oracle Order Management integration with pricing. Any application which wishes to use Oracle Pricing should create a request type lookup code to identify their transaction.

**Table C-17 Request Type Lookup**

Code	Meaning	Function
ONT	Order Management Order	Used to price an Order Management Order.

## Source System

*Access Level: Extensible*

The Source System is used to identify the origin of the pricing data. The pricing engine will use this information to restrict its search to pricing information which originated from a particular application depending on the Request Type to Source System Setup.

Any application which wishes to use create pricing information should create a source system lookup code to identify their pricing data

**Table C-18 Source System Lookup**

Code	Meaning	Function
QP	Oracle Pricing	Use Oracle Pricing tables as data origin.

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## Modifier Scenarios

This appendix illustrates a modifier scenario and includes the topic Modifier Scenarios on page D-2

## Modifier Scenarios

### Discount

#### Scenario 1

If the customer is a preferred customer or customer spends more than 150 currency units, they receive 10% off the order.

1. Create a modifier.

Modifier Type: Discount

Modifier Level: Order

Application Method: Percent

Value: 10

2. In the Line Qualifiers window, create two line qualifiers.

Grouping Number: 1

Qualifier Context: Volume

Qualifier Attribute: Order Amount

Operator: Between

Value From: 150

Grouping Number: 2

Qualifier Context: Customer

Qualifier Attribute: Customer Class

Operator: =

Value From: Preferred

#### Scenario 2

For any ten compact discs purchased by April 2000, the customer receives 2 currency units off.

Create a modifier.

Modifier Type: Discount

Modifier Level: Line

End Date: 30 April 2000  
Product Attribute: Item Category  
Product Attribute Value: CD  
Volume Type: Item Quantity  
Break Type: Recurring  
Value From: 10  
Application Method: Lumpsum  
Value: 2

### **Scenario 3**

For every eight currency units spent on cat food, the customer accrues five shopper points.

Create a modifier.

Modifier Type: Discount  
Modifier Level: Line  
Product Attribute: Item Category  
Product Attribute Value: Cat Food  
Volume Type: Item Amount  
Break Type: Recurring  
Value From: 8  
Select Accrue  
Benefit Quantity: 5  
Benefit UOM: Shopper Point

### **Scenario 4**

Customers mentioning the Summer Special Promotion receive 5 currency units off of any tennis racket except the FastFireIII model

1. Create a modifier.

Modifier No: SUMMER SPECIAL  
Modifier Type: Discount

Modifier Level: Line

Product Attribute: Item Category

Product Attribute Value: Tennis Rackets

Application Method: Amount

Value: 5

2. In the Exclude window, create an excluded item.

Product Attribute: Item

Product Value: FastFire III

Select Exclude

### **Scenario 5**

Customers who buy two bottles of shampoo receive one currency unit off of the third bottle of shampoo.

Create a modifier.

Modifier Type: Discount

Modifier Level: Line

Product Attribute: Item

Product Attribute Value: Shampoo

Volume Type: Item Quantity

Break Type: Recurring

UOM: Each

Value From: 3

Application Method: Lumpsum

Value: 1

### **Surcharge**

### **Scenario 6**

Customers in the National Accounts territory who spends less than 1000 currency units per order receives a 2% surcharge.

1. Create a modifier.  
Modifier Type: Surcharge  
Modifier Level: Order  
Application Method: Percent  
Value: 10
2. In the Line Qualifiers window, create two line qualifiers for the modifier.  
Grouping Number: 1  
Qualifier Context: Volume  
Qualifier Attribute: Order Amount  
Operator: Between  
Value To: 1000  
Grouping Number: 1  
Qualifier Context: Customer  
Qualifier Attribute: Customer Class  
Operator: =  
Value From: National Accounts

**Scenario 7**

Any customer placing a rush order (delivery required within two days) for replacement motors receives a 50 currency unit surcharge.

1. Create a modifier.  
Modifier Type: Surcharge  
Modifier Level: Line  
Product Attribute: Item Category  
Product Attribute Value: Motors, Spare  
Application Method: Amount  
Value: 50

2. In the Line Qualifiers window, create a qualifier for the modifier. You have created qualifier attribute Days to Requested Delivery and created the appropriate sourcing rules for this attribute.

Grouping Number: 1

Qualifier Context: Order

Qualifier Attribute: Days to Requested Delivery

Operator: Between

Value To: 2

## Price Break

### Scenario 8

All employees in Company ABC's mobile phone plan receive per minute discounts based on minutes used, as follows:

- 0-120 minutes: 0.5 currency units per minute
- 121-240 minutes: 0.10 currency units per minute
- 241-420 minutes: 0.12 currency units per minute
- > 421 minutes: 0.15 currency units per minute

A customer who uses 150 minutes receives the following discounts:

- 0.5 currency unit per minute discount on 120 minutes
- 0.10 currency unit per minute discount on 30 minutes

1. Create a modifier.

Modifier Type: Price Break Header

Modifier Level: Line

Product Attribute: Item

Product Attribute Value: Minutes

Volume Type: Item Quantity

Break Type: Range

Adjustment Type: Discount

2. In the Price Break Lines region, enter the break lines.

Value From: 0  
Value To: 120  
Application Method: Amount  
Value: 5

Value From: 121  
Value To: 240  
Application Method: Amount  
Value: 10

Value From: 241  
Value To: 420  
Application Method: Amount  
Value: 12

Value From: 421  
Application Method: Amount  
Value: 15

3. In the Line Qualifiers window, create a qualifier for the price break modifier.

Grouping Number: 1  
Qualifier Context: Customer  
Qualifier Attribute: Customer Name  
Operator: =  
Value From: ABC

### **Scenario 9**

Customers who buy cases of TY brand products across an order receive a percent rebate per case as follows:

- 1 - 500 cases: 2% rebate per case

- 501 - 1000 cases: 3% rebate per case
  - > 1000 cases: 5% rebate per case
1. Create a modifier.
    - Modifier Type: Price Break Header
    - Modifier Level: Group of Lines
    - Product Attribute: Item Category
    - Product Attribute Value: TY
    - Volume Type: Item Quantity
    - Break Type: Point
    - UOM: Case
    - Adjustment Type: Discount
    - Select Accrue
  2. In the Price Break Lines window, enter the break lines.
    - Value From: 1
    - Value To: 500
    - Application Method: Percent
    - Value: 2
  
    - Value From: 501
    - Value To: 1000
    - Application Method: Percent
    - Value: 3
  
    - Value From: 1001
    - Application Method: Percent
    - Value: 5

## Other Item Discount

### Scenario 10

Customers who buy more than three meters of fabric across an order receive 10% off thermal curtain linings and 5% off drapery services.

1. Create a modifier.

Modifier Type: Other Item Discount

Modifier Level: Group of Lines

Product Attribute: Item Category

Product Attribute Value: Fabric

Volume Type: Item Quantity

Break Type: Point

UOM: Yard

Value From: 10

2. In the modifier details, enter the get products.

Product Attribute: Item

Product Value: Thermal Linings

Application Method: Percent

Value: 10

Product Attribute: Item

Product Value: Drapery Services

Application Method: Percent

Value: 5

### Scenario 11

Customers who buy a set of six chairs, a coffee table, or two standard lamps receive 400 currency units off of a dining table.

1. Create a modifier.

Modifier Type: Other Item Discount

Modifier Level: Line

Product Attribute: Item

Product Attribute Value: Dining Chair

Volume Type: Item Quantity

Break Type: Point

UOM: Each

Value From: 6

2. In the modifier details, enter the related product.

Group No: 1

Product Attribute: Item

Product Value: Coffee Table

UOM: Each

Group No: 2

Product Attribute: Item

Product Value: Standard Lamp

Pricing Attribute: Item Quantity

Operator: Between

Value From: 2

UOM: Each

3. In the modifier details, enter the get product.

Product Attribute: Item

Product Value: Dining Table

Application Method: Amount

Value: 400

## Promotional Goods

### Scenario 12

Customers who buy one bottle of shampoo receive a free bottle of conditioner.

1. Create a modifier.

Modifier Type: Promotional Goods

Modifier Level: Line

Product Attribute: Item

Product Attribute Value: Shampoo

Volume Type: Item Quantity

Break Type: Recurring

UOM: Each

Value From: 1

2. In the modifier details, enter the get product.

Product Attribute: Item

Product Value: Conditioner

Get Quantity: 1

Get Price: <price list line for conditioner>

Get UOM: Each

Application Method: Percent

Value: 100

### Scenario 13

Customers who buy two bottles of shampoo receive 10% off the purchase of a third bottle of shampoo.

1. Create a modifier.

Modifier Type: Promotional Goods

Modifier Level: Line

Product Attribute: Item

Product Attribute Value: Shampoo

Volume Type: Item Quantity

Break Type: Recurring

UOM: Each

Value From: 2

2. In the modifier details, enter the get product.

Product Attribute: Item

Product Value: Shampoo

Get Quantity: 1

Get Price: <price list line for shampoo>

Get UOM: Each

Application Method: Percent

Value: 10

#### **Scenario 14**

Customers who spend over 45 currency units on an order receive a free cosmetic bag.

1. Create a modifier.

Modifier Type: Promotional Goods

Modifier Level: Order

2. In the Line Qualifiers window, create a qualifier.

Grouping Number: 1

Qualifier Context: Volume

Qualifier Attribute: Order Amount

Operator: Between

Value From: 45

3. In the modifier details, enter the get product.

Product Attribute: Item

Product Value: Cosmetic Bag

Get Quantity: 1  
Get Price: <price list line for cosmetic bag>  
Get UOM: Each  
Application Method: Percent  
Value: 100

## Coupon Issue

### Scenario 15

Customers who buy any product in the Chubo brand receive 10% off any item in the Chubo brand on their next order.

1. Create a modifier line.  
Modifier Type: Discount  
Modifier Level: Line  
Product Attribute: Item Category  
Product Attribute Value: Chubo  
Application Method: Percent  
Value: 10
2. Create a second modifier line for the coupon issue and assign it to the modifier from step 1.  
Modifier Type: Coupon Issue  
Modifier Level: Line  
Product Attribute: Item Category  
Product Attribute Value: Chubo  
Coupon Modifier: <modifier from step 1>

### Scenario 16

Customers ordering from the website receive a coupon for 10% off a future order.

1. Create a modifier line.  
Modifier Type: Discount

Modifier Level: Order

Application Method: Percent

Value: 10

2. Create a second modifier line for the coupon issue and assign it to the modifier from step 1.

Modifier Type: Coupon Issue

Modifier Level: Order

Coupon Modifier: <modifier from step 1>

3. In the line qualifiers window, create a qualifier for the coupon issue modifier from step 2. You have created the qualifier attribute Website Domain and created the appropriate sourcing rules for it.

Grouping Number: 1

Qualifier Context: Customer

Qualifier Attribute: Website Domain

Operator: =

Value From: co.uk

### **Scenario 17**

With any order, receive a coupon for two free bags of coffee on a future order.

1. Create a modifier line.

Modifier Type: Promotional Goods

Modifier Level: Order

2. In the modifier details, enter the get product.

Product Attribute: Item

Product Value: Coffee

Get Quantity: 2

Get Price: <price list line for bag of coffee>

Get UOM: Bag

Application Method: Percent

Value: 100

3. Create a second modifier line for the coupon issue and assign it to the modifier from step 1.

Modifier Type: Coupon Issue

Modifier Level: Order

Coupon Modifier: <modifier from step 1>

## Item Upgrade

### Scenario 18

Customers who order a standard video recorder before end of April 2000 receive a deluxe video recorder for the same price.

1. Create a modifier.

Type: Promotion or Deal

Date Type: Requested Ship Date

End Date: 31 April 2000

2. Assign a modifier line to the modifier list in Step 1. You have defined the item relationship between the standard video recorder and deluxe video recorder.

Modifier Type: Item Upgrade

Modifier Level: Line

Product Attribute: Item

Product Attribute Value: Video Recorder Standard

Upgrade Item: Video Recorder Deluxe

### Scenario 19

Customers who buy a shirt receive the shirt and a tie for the shirt price.

Create a modifier. You have defined the item relationship between the shirt and the marketing bill shirt and tie pack.

Modifier Type: Item Upgrade

Modifier Level: Line

Product Attribute: Item

Product Attribute Value: Shirt

Upgrade Item: Marketing item shirt and tie pack

## Terms Substitution

### Scenario 20

Customers who spend more than 1000 currency units on a sofa pay nothing for shipping.

Create a modifier.

Modifier Type: Terms Substitution

Modifier Level: Line

Product Attribute: Item Category

Product Attribute Value: Sofa

Volume Type: Item Amount

Break Type: Point

UOM: Each

Value From: 1000

Terms Attribute: Shipping Terms

Terms Value: No Charge

### Scenario 21

Customers who buy more than 100 currency units of one item on an order receive terms of 2% 30/NET 60.

1. Create a modifier.

Modifier Type: Terms Substitution

Modifier Level: Line

Terms Attribute: Payment Terms

Terms Value: 2% 30/NET 60

2. In the Line Qualifiers window, create a qualifier.

Grouping Number: 1

Qualifier Context: Volume  
Qualifier Attribute: Line Amount  
Operator: Between  
Value From: 100

## Freight and Special Charges

### Scenario 22

For all low priority shipments, calculate shipping charges by order line total weight as follows:

- 0 - 500 kg: 2.50 currency units
- 501 - 1000 kg: 3.50 currency units
- > 1000 kg: 5.00 currency units

Profile Option QP: Line Weight UOM Code is kg.

1. Create a modifier.

Modifier Type: Freight Charge  
Modifier Level: Line  
Application Method: Lumpsum  
Value: 2.50

2. In the Line Qualifiers window, create a qualifier for the modifier from step 1.

Grouping Number: 1  
Qualifier Context: Order  
Qualifier Attribute: Shipment Priority  
Operator: =  
Value From: Low

Grouping Number: 1  
Qualifier Context: Volume  
Qualifier Attribute: Line Weight

Operator: =

Value From: 0

Value To: 500

3. Create a second modifier.

Modifier Type: Freight Charge

Modifier Level: Line

Application Method: Lumpsum

Value: 3.50

4. In the Line Qualifiers window, create a qualifier for the second modifier from step 3.

Grouping Number: 1

Qualifier Context: Order

Qualifier Attribute: Shipment Priority

Operator: =

Value From: Low

Grouping Number: 1

Qualifier Context: Volume

Qualifier Attribute: Line Weight

Operator: =

Value From: 501

Value To:1000

5. Create a third modifier.

Modifier Type: Freight Charge

Modifier Level: Line

Application Method: Lumpsum

Value: 3.50

6. In the Line Qualifiers window, create a qualifier for the third modifier from step 5.

Grouping Number: 1

Qualifier Context: Order

Qualifier Attribute: Shipment Priority

Operator: =

Value From: Low

Grouping Number: 1

Qualifier Context: Volume

Qualifier Attribute: Line Weight

Operator: =

Value From: 1001

### Scenario 23

Calculate freight handling charge as a 10% markup of actual handling cost.

1. Create a formula.

Formula Name: Handling Cost

Formula: 1 \* 2

2. Create a formula line.

Formula Line Type: Pricing Attribute

Pricing Attribute Context: Pricing Attribute

Pricing Attribute: Handling Cost Amount

Step: 1

Formula Line Type: Constant

Component: 1.1

Step: 2

3. Create a modifier.

Modifier Type: Freight Charge

Modifier Level: Line

Application Method: Lumpsum

Formula: <reference formula Handling Cost from step 1>

4. In the Line Qualifiers window, create a qualifier for the third modifier from step 2.

Grouping Number: 1

Qualifier Context: Order

Qualifier Attribute: Freight Cost Type

Operator: =

Value From: Handling

## Newprice

### Scenario 1

**Table D-1 Newprice Scenario 1: List Price 1000, Selling Price 25**

Incompatibility Level	Precedence	Bucket	Operator	Value	Engine Selects
1	10	1	NEWPRICE	30	No
1	10	1	NEWPRICE	25	Yes
1	10	1	NEWPRICE	40	Yes

Within the same incompatibility group, when all of the lines have the same Precedence, the pricing engine performs best price processing. The final selling price is in line 2, 25 currency units. In this scenario, the bucket is not important to the result.

**Scenario 2**

**Table D-2 Newprice Scenario 2: List Price 1000, Selling Price -1005**

Incompatibility Level	Precedence	Bucket	Operator	Value	Engine Selects	Adjusted Amount
1	10	1	NEWPRICE	30	Yes	-970
2	10	1	NEWPRICE	25	Yes	-975
3	10	1	NEWPRICE	40	Yes	-960

With different incompatibility levels, the pricing engine evaluates the lines according to buckets. Since all of the lines are in the same bucket, the pricing engine calculates Adjusted Amount from the list price. It calculates the selling price as follows:

List Price - Sum of the Adjusted Amounts  
 $1000 - (970 + 975 + 960) = 1000 - 2095 = -1905$

**Scenario 3**

**Table D-3 Newprice Scenario 3: List Price 1000, Selling Price 40**

Incompatibility Level	Precedence	Bucket	Operator	Value	Engine Selects	Adjusted Amount
1	10	1	NEWPRICE	30	Yes	-970 (Base price: 1000)
2	10	2	NEWPRICE	25	Yes	-5 (Base price: 30)
3	10	3	NEWPRICE	40	Yes	15 (Base price: 25)

With different incompatibility levels, the pricing engine evaluates the lines according to buckets. Since each line is in a different bucket, the pricing engine calculates Adjusted Amount from the base price of the previous bucket (list price is in bucket 0). It calculates the selling price as follows:

List Price - Sum of the Adjusted Amounts  
 $1000 - (970 + 5 - 15) = 1000 - 960 = 40$

As the pricing engine evaluates the eligible list lines, it resolves incompatibilities in all phases. You can set up your modifiers such that the

pricing engine determines most of the list line eligibility at the search stage. Then, the pricing engine calculates the final selling price bucket by bucket.

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## Formula Scenarios

This appendix illustrates formula scenarios and includes the topic Formula Scenarios on page E-2

## Formula Scenarios

Splinters Glass Company manufactures windshields for cars and trucks. It sells both to wholesale customers and to retail customers.

### Scenario 1

To its retail customers, Splinters prices windshields based on the dimension of the sheet of glass according to the formula 3 currency units \* Width \* Height \* Thickness Factor.

The table below shows the thickness factors.

**Table E-1**

<b>Glass Thickness</b>	<b>Thickness Factor</b>
< 5 mm	10%
5 mm - 10 mm	15%
> 10 mm	20%

Splinters sets up Oracle Pricing to use formula and factor-based pricing.

### Step 1

1. In the flexfield definition form, query the pricing attributes flexfield.
2. Define three new pricing attributes flexfield segments—width, height, and thickness. Use the context Pricing Attributes.
3. Save your work and close the form.

### Step 2

Create a pricing formula.

1. Create a formula header.

Formula Name: Glass Pricing Formula and Formula = 1 \* 2 \* 3 \* 4

2. Create a formula line.

Formula Type: Numeric Constant

Component: 3

Step Number: 1

3. Create a second formula line.  
Formula Type: Pricing Attributes  
Pricing Attribute Context: Pricing Attributes  
Pricing Attribute: Width  
Step Number: 2
4. Create a third formula line.  
Formula Type: Pricing Attributes  
Pricing Attribute Context: Pricing Attributes  
Pricing Attribute: Height  
Step Number: 3
5. Create a fourth formula line.  
Formula Type: Factor List  
Component: Thickness Factor  
Step Number: 4
6. Click Factors.
7. In the Base Pricing Attributes region, create a row.  
Base Pricing Attribute: Thickness  
Comparison Operator: Between  
Value From: 0  
Value To: 5  
Adjustment Factor: 0.10
8. Create a second row in the Base Pricing Attributes region.  
Base Pricing attribute: Thickness  
Comparison Operator: Between  
Value From: 5  
Value To: 10  
Adjustment Factor: 0.15
9. Create a third row in the Base Pricing Attributes region.

Base Pricing Attribute: Thickness

Comparison Operator: Between

Value From: 10

Adjustment Factor: 0.20

10. Save your work and close the form.

### **Step 3**

Create a price list for retail customers, create a list line, and attach the formula.

1. Create a price list.

Name: Retail

2. Select the Qualifiers tabbed region.

3. Add a qualifier.

Context: Customer

Attribute: Customer Class

Value: Retail

4. Create a new list line.

Item: Windshield

UOM: Each

Dynamic Formula: Glass Pricing Formula

Method: Amount

Line Type: PLL

5. Save your work and close the form.

## Scenario 2

To its retail customers, Splinters charges for its windshield warranty protection plan at 10% of the cost of the replacement windshield. The formula is 10% \* price of the Windshield item on the Replacement price list).

Splinters sets up Oracle Pricing to use formula-based pricing.

### Step 1

Create a new pricing formula.

1. Create a formula header.

Formula Name: Warranty Pricing Formula

Formula: 1\*2

2. Create a formula line.

Formula Type: Numeric Constant

Component: 0.10

Step Number: 1

3. Create a second formula line.

Formula Type: Price List Line

Component: Windshield line of Replacement price list

Step Number: 2

4. Save your work and close the form.

### Step 2

Create a price list for retail customers, create a list line, and attach the formula.

1. Create a price list.

Name: Warranties

2. In the Qualifiers region, add a qualifier.

Context: Customer

Attribute: Customer Class

Value: Retail

3. Create a list line.

Item: Protection Plan

UOM: Each

Dynamic Formula: Warranty Pricing Formula

Method: Amount

Line Type: PLL

4. Save your work and close the form.

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## Windows and Navigator Paths

This appendix shows the default navigator paths for Oracle Pricing application.

### Windows and Navigator Paths

For forms and detailed information described in other manuals:

See...	Refer to this manual for a complete form description
OM	Oracle Order Management User's Guide
User	Oracle Application User's Guide

Brackets ([]) indicate a button.

Window Name	Navigation Path
Add Items to Price List	Price Lists > Add Items to Price List
Adjust Price List	Price Lists > Adjust Price List
Attribute Defaulting Rules	Setups > Attribute Mapping > [Defaulting Rules...]
Copy Price List	Price Lists > Copy Price List
Defaulting Condition Validation Templates	Setups > Attribute Mapping > [Defaulting Condition Templates...]
Defaulting Setup	Setups > Attribute Mapping
Define Modifier	Modifiers > Modifier Setup
	Modifiers > Modifier Incompatibility Setup > [Modifiers]

<b>Window Name</b>	<b>Navigation Path</b>
Define Modifier - Define GSA Price	Price Lists > GSA Pricing Setup
Define Modifier Details	Modifiers > Modifier Setup > [Define Details*]
Descriptive Flexfield Segments	Setups > FlexFields
Event Phases	Setups > Event Phases
Exclude Items	Modifiers > Modifier Setup > [Exclude]
Factors	Pricing Formulas > Formulas Setup > [Factors]
Find Personal Profile Values	Setups > Profiles
Find Requests	View Concurrent Requests
	View Concurrent Requests > [Find] > [Find Requests]
GSA Qualifiers	Price Lists > GSA Pricing Setup > [List Qualifiers]
Incompatibility Groups	Setups > Modifier Incompatibility Setup > Incompatibility Groups
Log file: request id	View Concurrent Requests > [Find] > [View Log...]
More Pricing Attributes	Modifiers > Modifier Setup > [Pricing Attributes]
Oracle Pricing Lookups	Setups > Lookups
Personal Profile Values	Setups > Profiles > [Find]
Price Breaks	Pricing Agreements > Price Breaks
	Modifiers > Modifier Setup > [Define Details*] > Price Breaks
	Price Lists > Price List Setup > [Price Breaks]
Price Lists	Price Lists > Price List Setup
Pricing Agreements	Pricing Agreements
Pricing Attributes	Pricing Agreements > [Pricing Attributes]
	Price Lists > Price List Setup > [Pricing Attributes]
Pricing Formulas	Pricing Formulas > Formulas Setup
QUALIFIER - Header Level Qualifiers	Modifiers > Modifier Setup > [List Qualifiers] > [Cancel]

Window Name	Navigation Path
QUALIFIER - Line Level Qualifiers	Modifiers > Modifier Setup > [Line Qualifiers] > [Cancel]
Qualifier Group	Qualifier Setup
Qualifier Groups	Modifiers > Modifier Setup > [List Qualifiers]
	Modifiers > Modifier Setup > [Line Qualifiers]
Redeem Accruals	Modifiers > Accrual Redemption
Report: request id	View Concurrent Requests > [Find] > [View Output]
Request Detail	View Concurrent Requests > [Find] > [View Details...]
Request Diagnostics	View Concurrent Requests > [Find] > [Diagnostics]
Requests	View Concurrent Requests > [Find]
Segments Summary (Attachment context)	Setups > FlexFields > [Segments]
	Setups > FlexFields > [Segments] > [New]
	Setups > FlexFields > [Segments] > [Open]
Source Systems	Setups > Source Systems
Submit a New Request	Reports
	View Concurrent Requests > [Submit a New Request...]
Submit Request	Reports > OK
Value Sets	Setups > FlexFields > [Segments] > [Value Set]
	Setups > FlexFields > [Segments] > [New] > [Value Set]
	Setups > FlexFields > [Segments] > [Open] > [Value Set]
Update Formula Prices	Pricing Formulas > Update Formula Prices



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# Glossary



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