PRICING ADMINISTRATION GUIDE

MIDMARKET EDITION

eBUSINESS APPLICATIONS

VERSION 7.0, REV A

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Introduction

Who Should Use This Guide

This guide provides information about using the pricing administration functionality of Siebel eBusiness Applications, MidMarket Edition.

NOTE: All Siebel MidMarket product names include the phrase MidMarket Edition to distinguish this product from other Siebel eBusiness Applications. However, in the interest of brevity, after the first mention of a MidMarket product in this document, the product name will be given in abbreviated form. For example, after Siebel Call Center, MidMarket Edition, has been mentioned once, it will be referred to simply as Siebel Call Center. Such reference to a product using an abbreviated form should be understood as a specific reference to the associated Siebel MidMarket Edition product, and not any other Siebel Systems offering. When contacting Siebel Systems for technical support, sales, or other issues, note the full name of the product to ensure its proper identification and handling.

This book will be useful to people whose title or job description matches one of the following:

Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.

How This Guide Is Organized

This guide provides information necessary to implement, configure, and monitor pricing within Siebel eBusiness Applications. If you work with applications that use pricing functionality, you will need to know about pricing configuration, administration, and reporting.

Additional Documentation

The product documentation set for Siebel eBusiness Applications is provided on the *Siebel Bookshelf* CD-ROM. For general information about Siebel product documentation, see the *Bookshelf, MidMarket Edition* home page and the *Documentation Roadmap, MidMarket Edition*.

Siebel Systems, Inc., reserves the right to modify the documentation for Siebel eBusiness Applications at any time. For updates to Siebel documentation, go to http://ebusiness.siebel.com/supportweb/.

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What's New in This Release

For a list of features new in this release, see the "What's New" books included on the *Siebel Bookshelf*. Your Siebel implementation may not have all the features described in that guide, depending on which software modules you have purchased.

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- You must attend Siebel University training to become a *designated contact*.
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- The title and version of the guide (very important)
- The name and version number of the Siebel eBusiness Application you are using
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We appreciate your feedback.

Overview 1

About Pricing Administration

Siebel pricing administration allows you to work with:

- **Price Lists.** Create price lists and assign them to users. Price lists are created separately from products, so you can use different prices for the same products. For more information, see Chapter 2.
- **Volume Discounts.** Give customers a discount if they buy in volume. For example, if a customer buys more than one-hundred units, the customer can get a 10% discount. For more information, see Chapter 3.
- **Pricing Reports.** Create a variety of reports to track your pricing policies. For more information, see Chapter 4.

Logging On as the Siebel Administrator

The Siebel installer creates a Siebel administrator account that can be used to perform the tasks described in this guide. For more information, see *Siebel Server Administration Guide, MidMarket Edition* and the Siebel server installation guide for the operating system you are using*Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition*.

To log on as the Siebel administrator, start the application and log on using the user name and password assigned by your database administrator. Generally, the Siebel administrator connects to the server database.

Caution: Do not perform system administrative functions on your local database. Although there is nothing to prevent you from doing this, it can have serious results. Examples include:

- Data conflicts
- An overly large local database
- A large number of additional transactions to route

Because the processing order for component-based products is different, it will be described separately.

component-based component-based

Creating and Assigning Price Lists 2

About Price Lists

A price list is a set of standard prices for products or services. Price lists generally contain the first prices that a buyer sees, before any pricing adjustments take place.

A product must be assigned a price in a price list to appear in a catalog, so the price list is one of the requirements for a product's visibility.

This chapter looks at the three common ways of creating a price list:

- Create a new price list
- Copy and modify an existing price list
- Copy and transform an existing price list

After you create a price list, you must assign it to users, to make it control their prices.

Price List Prerequisites

Before you create any price list, you must create the products the prices apply to. You must:

- Define product lines
- Define products
- Associate each product to its product lines

For more information, see *Product Administration Guide, MidMarket Edition*.

Optional Prerequisites

The price list includes optional fields that let you associate it with other data in the Siebel application. You must define this other data before you can use these optional fields.

For example, if you want a price list to use volume discounts, you must define volume discount information before you can associate it with line items in a price list.

You do not have to define this data before creating the price list. You can skip these optional fields when you create the price list, and go back to the price list to fill them in later, after defining the data that is needed.

The types of data that can optionally be associated with price lists include:

- Assets, cost lists, and services. For more information, see *Product Administration Guide, MidMarket Edition* and the *Applications Administration Guide, MidMarket Edition*.
- Rate lists. For more information, see *Applications Administration Guide, MidMarket Edition*.
- Volume discounts. For more information, see Chapter 3, "Creating Volume Discounts," in this book.
- Product classes and attributes and their domains. For more information, see *Product Administration Guide, MidMarket Edition*.

The Process of Creating a New Price List

A price list consists of one price list header record associated with multiple line item records. The header record contains general information about the price list as a whole. The line items records contain prices for specific products.

You can create different price lists for the same products. For example, you can create one price list with the wholesale prices for all of your products, and another price list with the retail prices for all of your products. The line item records of these two price lists will have different prices for the same products.

To create a new price list, you must:

- Create a price list header
- Create a price list line item for each product in the price list

Creating a Price List Header

Each price list is defined by the data in its header, which includes its name, describes its purpose, and specifies the time period when it will be effective.

The price list header does not hold the actual prices for products. Prices are in the associated price list line items, which are described later in this chapter.

To define a price list

1. From the application-level menu, choose View > Site Map > Pricing Administration > Price List.
2. In the Price Lists list, click New.

   A new Price List record appears.

3 Enter information in the new record and in More Info form, as described in Table 2-1.

Table 2-1. Price List Header Fields (1 of 2)

Field	Explanation
Name	Required. Enter unique, meaningful name for this price list. Overwrite any system-generated name. If many price lists will appear in your system, use a consistent naming convention to name all your Price Lists.
Cost List	Optional. Select the cost list to be associated with this price list.
Currency	Required. Enter the currency for all amounts that will be in this price or be associated with it. All cost lists, terms, pricing models, and pricing adjustments associated with this price list or with line items in it must use this currency.
Shipping Method	Optional. Select one default shipping method to be associated with this price list. This appears as the default Shipping Method when a runtime user creates a quote or order that specifies this price list.
Payment Terms	Optional. Select one default set of payment terms to be associated with this price list. This selection appears as the default data for Payment Terms when a runtime user creates a Quote or Order that specifies this price list.
Organization	Required. Select all the organization which may have prices controlled by this price list. For more information see, "Assigning a Price List to a User" on page 2-12.
Shipping Terms	Optional. Select one default shipping charge protocol to be associated with this price list. This appears as the default Shipping Terms data when a runtime user creates a quote or order that specifies this price list.
Effective From	Required. Enter the date and time when this price list will become effective. By default, the application assigns the current system date and time when you first create the Price List record.
Effective To	Optional. Enter the date and time when this price list will become ineffective. After this time, Siebel applications will not be able to use this price list.
Updated By	Required. By default, the application assigns the user name used to log in to the current session in which this Price List record is created.
Last Updated	Required. By default, the application assigns the current system date and time when you most recently saved this Price List record.

Table 2-1. Price List Header Fields (2 of 2)

Field	Explanation
Integration ID	Optional. If this system-generated ID appears, it can be used as a unique identifier for this price list to assist with system integration tasks. The Integration ID field is used for system integration with external systems. This field is populated by Siebel EAI.
Description	Optional. Enter a description of the purposes, unique characteristics and limitations of this price list.

Creating a Price List Line Item

A price list line item contains price data for a specific product. It includes the product name and related information.

When you create a price list line item, you first select the product (which may be a service). This product provides the price list line item its name. Adding a price list line item is equivalent to adding a product to a price list.

In a given price list, you may have only one line item for a product.

If you have multiple price lists, the same product can have a line item in each price list. For example, your United States price list might have a line item for the product's retail price in the United States, your Canadian price list may have the product's retail price in Canada, and so on.

To define a new price list line item

1. From the application-level menu, choose View > Site Map > Pricing Administration > Price List.

   The Price List view appears, displaying the currently defined price lists.

2. In the Price List form, select the price list to which you want to add a line item.
3. Click the Price List Line Items view tab.
4. In the Price List Line Items list, click New.

   The Add Products dialog box appears.

5 In the Add Products dialog box, use the Query or Find options, if necessary, to locate the product you want to add to the price list. Select the product record and click Add.

The product that you selected appears in the new Price List Line Item record.

6 Complete the fields in the Price List Item Detail form, as described in Table 2-2.

Table 2-2. Price List Line Item Fields (1 of 2)

Field	Explanation
Name	Required. The product name that you select from the Add Products dialog box. A price list line item uses this product name as its unique ID.
List Price	Optional, but recommended. Enter a list price, the standard price used for most transactions and a most commonly used target price for price adjustments. If the list price is omitted the product may be offered with no price—the equivalent of a zero price.
Description	Optional. Enter a description of this line item and its unique qualities, especially if important for processing.
Product Line	Optional. Read-only. This value is taken from the product information. Specifies the line of products to which the line item product belongs.
Part Number (Part #)	Optional. Read-only. This value is derived from the product information. Specifies the part number assigned to the line item product.
Cost	Optional. Enter the cost of the line item product using the standard cost formula for this price list. This can be used as the target price for some price adjustment calculations.
MSRP	Optional. Enter the MSRP for reference purposes. In some cases, this can be used as the target price for price adjustment calculations.
Purchase Price	Optional. Enter the purchase price of the line item product. This can be used as the target price for some price adjustment calculations.
Unit of Measure	Optional. Select the unit of measure for the product item.

Table 2-2. Price List Line Item Fields (2 of 2)

Field	Explanation
Minimum Price	Optional but recommended. If a minimum price value is provided, the application does not offer a lower price for this line item, unless a runtime user (such as an agent) manually overrides this price. As a default, specify a minimum price of zero to prevent amount discounts from resulting in negative number prices.
Maximum Price	Optional. If a maximum price value is provided, the application does not offer a higher price for this line item, unless a runtime user (such as an agent) manually overrides this price.
Service Price %	Optional. Enter a service price percentage used for determining the service pricing associated with this line item. The service price percentage is applied to the target specified in the Service Pricing Method field.
Service Pricing Method	Optional. Specify a service pricing target for the service price percentage. This is used to determine the service pricing associated with this line item.
% Margin	Optional. Read-only. This is a calculated field that calculates margin based on the following formula: (List – cost)/List*100

Caution: If you do not specify a price for a product in its price list line item, that product may appear in a quote or order without a price, effectively making it free to a runtime user-buyer.

Copying and Modifying a Price List

After building a price list, you can copy and modify it to create a new price list that suits different types of customers or markets. For example, you might use a price list named United States Price List as the starting basis for creating new price lists for different countries, locations, organizations, currencies, accounts, or demographics.

First you copy the price list, which retains the original price list and recreates all of its data in a price list with a new name. The new price list must have a different name.

Then you modify the data in the copy as necessary.

To modify the data in more elaborate ways, you should use the Transform button, described in the following section, rather than modifying the data manually. For example, you can use the Transform function to convert all the currencies in a price list to a different currency.

NOTE: Do not edit the Currency field when you copy and modify a price list. To modify this field, use the Transform function, described in "Copying and Transforming a Price List" on page 2-10.

To copy and modify a price list

1. From the application-level menu, choose View > Site Map > Pricing Administration > Price List.
2. In the Price Lists list, select the price list you want to copy.
3. In the Price Lists list, click the menu button, then click Copy Record.

   A new Price List record appears, with all of the data from the original price list, except for the original price list name.

4. Modify the information in the fields of the price list header, described in Table 2-1 on page 2-5 and the price list line items, described in Table 2-2 on page 2-7.

   Either edit the fields directly or click the menu button, then click Change Records, and use the Change Records dialog box to modify the record.

   NOTE: Do not edit the Currency field directly. To modify this field, use the Transform function, described in the following section.

Copying and Transforming a Price List

The Transform function allows you to transform a copy of an existing price list by making sweeping price changes to product prices. It allows you to change every list price without modifying each individual line item separately. Using the Transform options, you can:

- Change all list prices by the percentage you specify. For example, you can increase all list prices to 130% of their previous value.
- Convert all list prices to a different currency. You specify the currency and the conversion date, and the prices are converted automatically.

The Transform function transforms the list price as well as the promotional price fields.

NOTE: If you use a pricing model to transform a price list, that pricing model should contain only single, matrix-based, or script-based type factors; it should not include any bundling or aggregate type factors. The purpose of a pricing model in the Transform operation is to modify the prices of single price list line items. Bundling or aggregate type pricing factors cannot do this because they apply to multiple line items.

Caution: To transform a price list, first make a copy of the Price List, then transform the copy.

To transform a price list

1. Copy the price list you want to transform, using the procedure in the section "Copying and Modifying a Price List" on page 2-8, but do not modify the price list.
2. Click the Transform button.

   The Transform Price List form appears.

3 Enter information in the Transform Price List form, as described in Table 2-3, and then click the Transform button.

Table 2-3. Transform Price List Form Fields

Field	Explanation
Transformed Price List Name	Required. The name of the transformed price list. The default is the name of the copied price list.
Currency Code	Required. The currency to be used for prices in the transformed price list. The default is the currency of the copied price list; if you are not changing currencies, keep the default.
Exchange Date	Required, if you are converting currencies. Enter the date for the currency exchange rate. The system will use the exchange rate on that day to convert currency.
Prorate %	Required. Enter a percentage to be applied to the list price for each product in the price list. For example, to increase all list prices by 30%, you would enter 130. To decrease all list prices by 20%, you would enter 80. The default is 100%, and if you do not want to change prices, you should keep this default.

NOTE: After clicking the Transform button to change the data, be sure to validate your results.

Assigning a Price List to a User

The price list that controls a user's prices depends on both organization and account:

- Organization limits visibility. The user cannot see a price list unless it was assigned to the user's organization in the Organization field of the price list record. A price list can be assigned to many organizations, and many price lists can be assigned to an organization.
- Account controls which price list is active for the user. The active price list is the price list associated with the user's account record. You can only associate one price list with an account record, so the user's prices are controlled by one price list.

When you associate a price list with an account, that price list is automatically defaulted in the quote or order when the account is entered for the quote or order.

NOTE: If you use Siebel eSales to sell to the public through the Web, customers may not have accounts. The default price list is used for customers without accounts. For information about setting a default price list, see the section about setup tasks in *Siebel eSales Administration Guide, MidMarket Edition*.

To assign a price list to a user

1. From the application-level menu, choose View > Site Map > Pricing Administration > Price List.
2. In the Price Lists list, select the price list you want to assign to the user.
3. In the price list's Organization field, click the select icon.

   The Organizations dialog box appears.
4. If the user's organization is not already listed in this dialog box, click New and add it. Then click OK.
5. From the application-level menu, choose View > Site Map > Accounts > All Accounts Across Organizations.
6. In the Accounts list, select the user's account.

7. In the More Info form, click the show more button to expand the form.
8. In the Price list field of the More Info form, click the select button.

   The Pick Price List dialog box appears.
9. In the Pick Price List dialog box, select the price list you want to use for that account, and click OK.

Creating Volume Discounts 3

About Volume Discounts

A volume discount is an adjustment to the price of a product based on the quantity of that product that is requested in the quote line or order line item. For example, you can set up a simple volume discount for a product that gives the customer:

- A 5% discount when the user requests five to 10 of the item
- A 10% discount when the user requests more than 10 of the item

Volume discounts apply to the quantity in the quote line or order line, not the total quantity in the entire quote or an entire order. If a user splits an order for a product into two or more lines on a quote, the volume discount calculation for that product would not be based on the total of the two lines.

In some circumstances volume discounts are not allowed. For example, if a sales agent manually enters a price discount, it is usual to have the Keep Discount option in force, which prevents volume discounts from being applied.

About Simple and Tiered Volume Discounts

When you define a volume discount, you select one of two discount methods:

- **Simple.** Applies a discount percent to every instance of the item in a quote or order line item if the quantity meets the volume discount quantity requirement. If the line item quantity satisfies this requirement, the entire quantity qualifies for the volume discount.
- **Tiered.** Applies the discount percentage defined by each Volume Discount Line Item record to the quantity of items defined in that Volume Discount Line Item record.

For example, you create a volume discount with line items that:

- Apply a 10% discount when the quantity is five to 10 items
- Apply a 20% discount when the quantity is 11 to 20 items
- Apply a 30% discount when the quantity is 21 items or more

If this were a simple volume discount, and if the customer bought 23 items, the customer would get a discount of 30% on all 23 items.

If this were a tiered volume discount, and if the customer bought 23 items, the customer would get no discount on items one to four, a 10% discount on items five to 10, a 20% discount on items 11 to 20, and a 30 percent discount on items 21 to 23.

The Process of Setting Up a Volume Discount

To set up a volume discount, you must:

- Create a volume discount record
- Create volume discount line items
- Link the volume discount to a product

Creating a Volume Discount Record

A volume discount record provides the top-level information about a volume discount, including its name, whether it is a simple or tiered volume discount, and the start and end dates.

Caution: If you delete a volume discount record, all references to this discount become invalid. Any price list line items that used this discount will no longer have a volume discount.

To create a volume discount record

1. From the application-level menu, choose View > Site Map > Pricing Administration > Volume Discount.
2. In the Volume Discounts list, click New.

   A new Volume Discount record appears.
3. Enter information in the new record and in More Info form, as described in Table 3-1.

Table 3-1. Price List Header Fields

Field	Explanation
Name	Required. Enter a unique, meaningful name for this volume discount.
Discount Method	Required. Select a method from the picklist. The options are Simple and Tiered, as described in the section "About Simple and Tiered Volume Discounts" on page 3-3.
Start Date	Required. Enter the date when this volume discount will become effective.
End Date	Optional. Enter the date when this volume discount will become ineffective. If the volume discount will not expire, leave this field blank.
Description	Optional. Enter a description of the purposes and unique characteristics of this price list.
Integration ID	Optional. If this system-generated ID appears, it can be used as a unique identifier for this price list to assist with system integration tasks. The Integration ID field is used for system integration with external systems. This field is populated by Siebel EAI.

Creating Volume Discount Line Items

Volume discount line items include information about quantities and percentage values of a volume discount.

Add a volume discount line item for each discount rate in the volume discount. For example, if you want to apply a 10% discount when the quantity is five to 10 and a 20% discount when the quantity is 11 or more, then you must add two volume discount line items.

When you add volume discount line items, be careful not to create gaps or overlapping quantities, which will create the following errors:

- If you leave a gap in a simple discount, quantities that fall within the range of the gap receive no discount at all.
- If you leave a gap in a tiered discount, quantities that fall within the range of the gap default to the lower tier.
- If you create overlapping discount items, quantities that fall within the range of the overlap default to the lower tier.

How the discounts in the line items are applied depends on whether this is a simple or tiered volume discount, as described in the section "About Simple and Tiered Volume Discounts" on page 3-3.

To create a volume discount line item

1. From the application-level menu, choose View > Site Map > Pricing Administration > Volume Discount.
2. Select the volume discount for which you want to create line items.
3. Click the Volume Discounts Line Items view tab.
4. In the Volume Discounts Line Items list, click New.

   A new Volume Discount Line Item record appears.

5 Enter information in the new record, as described in Table 3-1.

Table 3-2. Price List Header Fields

Field	Explanation
Name	Required. Enter a unique name for this volume discount line item. This name appears in the quotes that your sales representatives create for customers, so you should use a name that describes the discount, such as “10% Discount for Buying 5 to 10.”
Min Qty	Required. Enter the minimum quantity that must be purchased to get this discount rate.
Max Qty	Optional. Enter the maximum quantity that gets this discount rate. If this field is blank, this discount rate applies to all quantities above the minimum quantity.
Discount %	Required. Enter the percentage discount for purchasing these quantities.
Description	Optional. Enter a description of this volume discount line item.

Linking a Volume Discount to a Product

After a volume discount record has been created and the line items that describe the discount have been defined, you link it to a product. After you link a volume discount to a product, the discount is applied automatically when a sales representative or other user enters the product in a quote.

To apply a discount to a product

1. From the application-level menu, choose View > Site Map > Pricing Administration > Price List.
2. In the Price Lists list, select the price list to which you want the volume discount to apply.
3. Click the Price List Line Items view tab.
4. In the Price List Line Items list, in the Volume Discount field for a product, select the volume discount you want to apply to that product.

Creating Pricing Reports 4

About Pricing Reports

Siebel eBusiness Applications include a standard set of predefined reports that supply Pricing Administrators with fundamental pricing information.

You are not limited to using these basic reports. You can create additional reports or modify existing ones.

NOTE: The Pricing Engine Log file includes a variety of useful data that may be manually reformatted into reports. When you generate a Pricing Engine Log file, it is located in the Siebel server installation directory in a TEMP file.

Descriptions of Available Reports

Each of the predefined pricing reports that is available is described in this section.

Price Lists Report

Accessible from the Pricing Administration > Price List view, this report provides a list of all price lists in the database. Since this is a summary report, it contains Price List header data information, including the following information for each price list:

- Price list name
- Price list description
- Base currency
- Terms
- Shipping methods
- Effective dates

Price List Based Price Book Report

Accessible from the Pricing Administration > Price List view, this report shows line item (product-specific) pricing information for the selected price list.

For each line item in the selected price list, this report includes the following:

- Price list line item data
- Catalog data (product line, part number, vendor number)
- Cost data
- Margin %
- Minimum and maximum sales price

Quote Reports

The following reports also provide information useful to pricing administrators.

Quote List Report

Accessible from the Quotes view, this report contains a listing of all the quotes.

Current Quote Report

Accessible from the Quotes view, this report contains formatted information about the quote line item currently selected.

NOTE: You must select a line item from the quote before running this report.

Summary Quote Report

Accessible from the Quotes view, this report contains summary information for the quote, such as taxes and terms. It also includes fundamental line item information.

Package Quote Report

Accessible from the Quotes view, this report contains package information and summary information for the quote. It also includes fundamental line item information. Information about items that are not in packages is classified as Other.

Running Reports

You can run all the reports described in this chapter in the same way.

To run the Price Lists report

1. Navigate to the screen and view that the report is accessible from, as specified in the description of the report.
2. From the application level menu, choose View > Reports.
3. In the Reports dialog box, select the report name from the drop-down menu, and click Run Now.

   The selected report appears in the Siebel Report Viewer.
4. You can print a copy of the report by clicking the printer icon.

About Creating and Modifying Reports

You are not limited to working with these standard, predefined reports. The standard reports are part of a large set of Siebel application reports. You can modify these reports or add new reports in two locations:

- **Siebel Tools.** Used to define the of the data exported from the Siebel application to the Actuate report, and to attach reports to the Reports menus of specific views.
- **Actuate e.Report Designer Professional.** Used to define report behavior, appearance, and data acquisition.

For information about defining and working with reports, see *Siebel Reports Administration Guide, MidMarket Edition*.