

PeopleSoft®

PeopleSoft Enterprise Pricer 8.8 PeopleBook

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PeopleSoft Enterprise Pricer 8.8 PeopleBook
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About These PeopleBooks

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection web site. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection web site, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection web site, access the PeopleSoft Press web site under the Ordering PeopleBooks topic. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection web site, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W , hold down the ALT key while you press W .
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>
(ISO)	<p>Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses.</p> <p>The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example:</p> <p>(GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.</p>
Cross-references	PeopleBooks provide cross-references either below the heading "See Also" or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Enterprise Pricer 8.8 Preface

This preface discusses:

- PeopleSoft application fundamentals.
- Common elements in this PeopleBook.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook.

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise Pricer PeopleBook* provides you with implementation and processing information for your PeopleSoft Promotions Management system. However, additional, essential information describing the setup and design of your system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of these PeopleBooks.

The following companion PeopleBooks contain information that applies specifically to PeopleSoft Enterpricer:

- *PeopleSoft Application Fundamentals for FIN, ESA, and SCM PeopleBook*
- *PeopleSoft Setting Up Global Options and Reports PeopleBook*
- *PeopleSoft OrderManagement PeopleBook*
- *PeopleSoft Promotions Management PeopleBook*
- *PeopleSoft Working With Customers and Orders PeopleBook*
- *PeopleSoft Supply Chain Management Integration PeopleBook*

Common Elements Used in This PeopleBook

Business Unit

An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description

Freeflow text up to 30 characters.

Effective Date

Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Language or Language Code	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Process Frequency group box	Designates the appropriate frequency in the Process Frequency group box: <i>Once</i> executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to <i>Don't Run</i> . <i>Always</i> executes the request every time the batch process runs. <i>Don't Run</i> ignores the request when the batch process runs.
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Report ID	The report identifier.
Report Manager	This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Run Control ID	A request identification that represents a set of selection criteria for a report or process.
SetID	An identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define your organization's structure and processing options.
Short Description	Freeflow text up to 15 characters.
User ID	The system identifier for the individual who generates a transaction.

CHAPTER 1

Getting Started With PeopleSoft Enterprise Pricer Implementation

This chapter discusses implementing PeopleSoft Enterprise Pricer.

PeopleSoft Enterprise Pricer Overview

These features are described in detail in the *PeopleSoft Enterprise Pricer PeopleBook*:

- Implementing PeopleSoft Enterprise Pricer.
- Using pricing data messages.
- Creating price lists.
- Creating price rules.
- Creating the arbitration plan.
- Using the simulator.
- Updating price lists.

PeopleSoft Enterprise Pricer Implementation

PeopleSoft Enterprise Pricer does not require table-loading implementation steps. In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management PeopleBook, with information about where to find the most current version of each.

See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “PeopleSoft Application Fundamentals PeopleBook Preface”.

CHAPTER 2

Implementing PeopleSoft Enterprise Pricer

The section provides an overview of PeopleSoft Enterprise Pricer and discusses how to:

- Establish price-by key and price-list fields.
- Configure PeopleSoft Enterprise Pricer.
- Add additional price-by fields.

Understanding PeopleSoft Enterprise Pricer

This section provides an overview and discusses:

- How pricing occurs for a sales order in PeopleSoft Order Management.
- Period-to-date pricing.
- Weight and Volume pricing.

PeopleSoft Enterprise Pricer enables realtime dynamic pricing for quotes and orders based on your company pricing policies. You can define rules that determine what discounts, surcharges, or giveaways apply under specific order conditions such as products ordered, customer, customer region, and so on. The functionality is designed for pricing and marketing managers and includes the capability for development, testing, deployment, and maintenance of price lists, rules, and arbitration plans.

PeopleSoft Enterprise Pricer consists of pricing elements that you use to create your pricing structure:

- Price lists

These enable you to select products and conditions where the price list applies to a transaction. During a transaction, the system either determines the product price based on your predefined search hierarchy for the transaction or the product's lowest price on any associated active price lists. This price is used as the basis for any further discounts and surcharges.

- Price rules

These define the conditions that must be met in order for the adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

- Arbitration plans

These define how the price rules are to be applied to the base price when the transaction is priced.

- Pricing simulator

It enables you to test your pricing scenarios to determine whether the pricing adjustments create the desired results.

When you set up your pricing scenario, set up the pricing elements in this order:

1. Price lists.
2. Price rules.
3. Arbitration plans.

Pricing in PeopleSoft Order Management

Here is an example of how pricing is determined on a sales order in PeopleSoft Order Management.

During sales order entry, the arbitration ID is defaulted to the sales order or buying agreement from the sold to customer, the pricing customer group associated with the sold to customer, or the arbitration plan marked as the default for the transaction being priced. When the CSR creates or modifies a sales order or quote, PeopleSoft Enterprise Pricer is called.

The list price is retrieved based on the price list lookup option defined for the sales order transaction in PeopleSoft Enterprise Pricer:

1. Price lists associated with price list fields defined for the pricing transaction. The system selects the first active list price in the defined priority order if “lookup in priority order” is defined for the transaction.
2. The best (lowest) price for price lists associated with price list fields is selected if “consider all prices” is defined for the transaction.
3. The base price established for the product is selected if the system finds no price defined in the price lists. This is always the default.

Note. The Order Management transactions (sales order, quote, and buying agreement) are delivered with the list price lookup option “consider all prices”.

PeopleSoft Enterprise Pricer then retrieves any price rule conditions that match the transaction and applies the price formulas to the base price. The applicable price rules and formulas are applied in the order as defined by the arbitration plan. The pricing engine returns an audit list of the price rules and adjustments which are applied to the transaction at pricing time. These price adjustment audits are saved with the order line/schedule.

Note. The Min/Max target discount, Min/Max target surcharge, and Min/Max target price types allowed in PeopleSoft Enterprise Pricer are not implemented in PeopleSoft Order Management for this release. The system has been configured so that these items are not available when defining the pricing objects for the sales order transaction. The minimum price hold feature at the product / unit of measure definition is still available on the sales order and quote for this release.

When a buying agreement line is created, you can optionally enter an arbitration plan ID as the exclusive pricing ID. If an arbitration plan is entered, the system calls PeopleSoft Enterprise Pricer. The net unit price returned from the pricing engine is used as the net price on the buying agreement line. When the sales order or quote is priced with a buying agreement line assigned to it, the price comes directly from the buying agreement line.

The Price and Availability component enables you to price a transaction without actually creating the sales order or quote. You can enter the same information as on the sales order or quote. You can select a base price from the Inventory business unit base price or let the system automatically select a base (list) price from the price lists. The system then applies all price rule formula adjustments. As in sales order processing, PeopleSoft Enterprise Pricer returns an audit list of the price rules and formulas that are applied at pricing time.

Batch pricing for the sales order or quote works the same way as the online pricing of the sales order or quote. Depending on how you have set up your online pricing installation options, pricing during order entry will occur in the background or when you save or select the price order button from the order entry or the shipment schedules page.

Note. The entire sales order or quote is priced every time a line or schedule is priced. This means new adjustments that may apply to previously entered lines will occur with every change or newly entered line.

The following diagram illustrates how pricing occurs on the sales order.

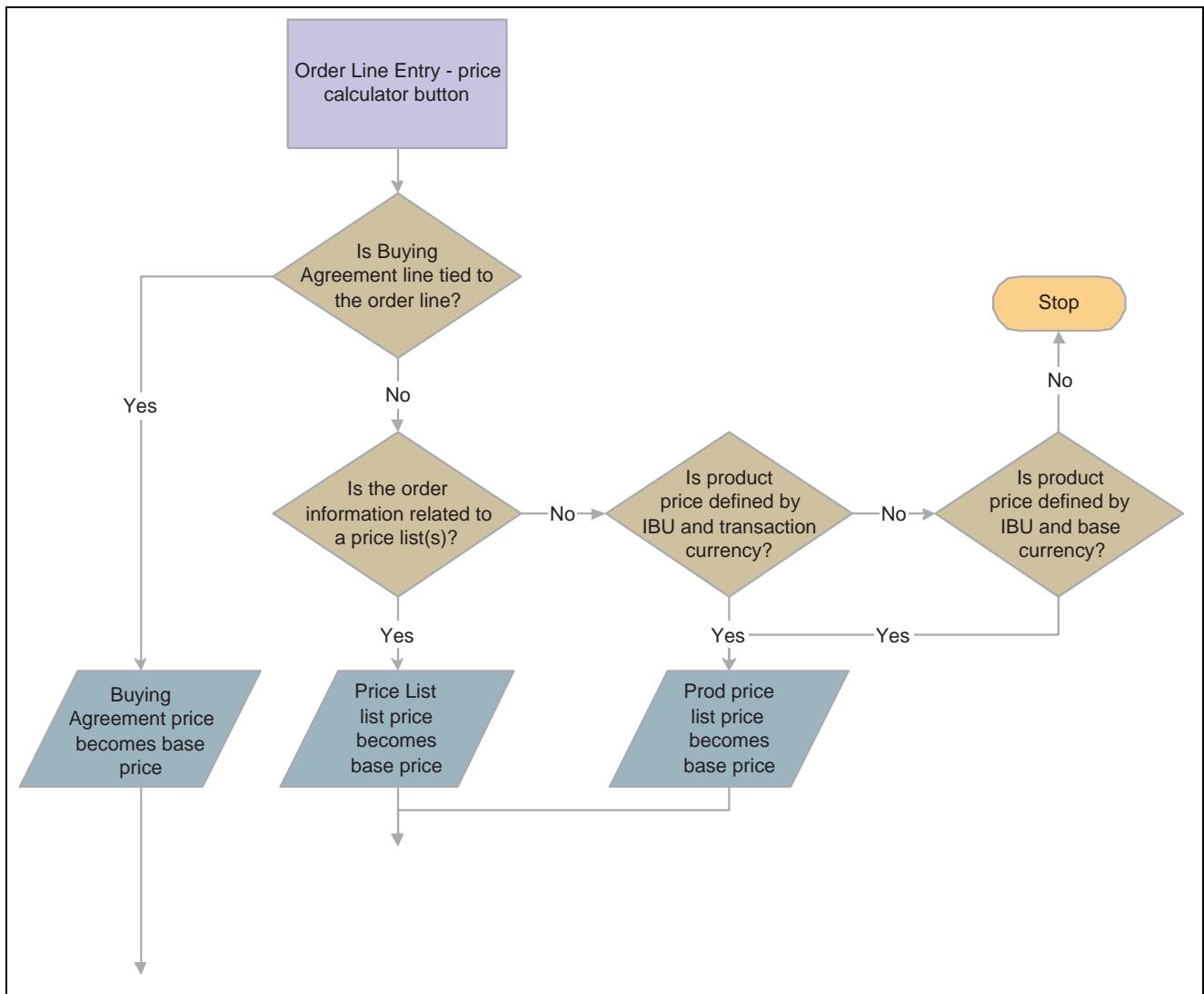


Diagram of sales order pricing (1 of 2)

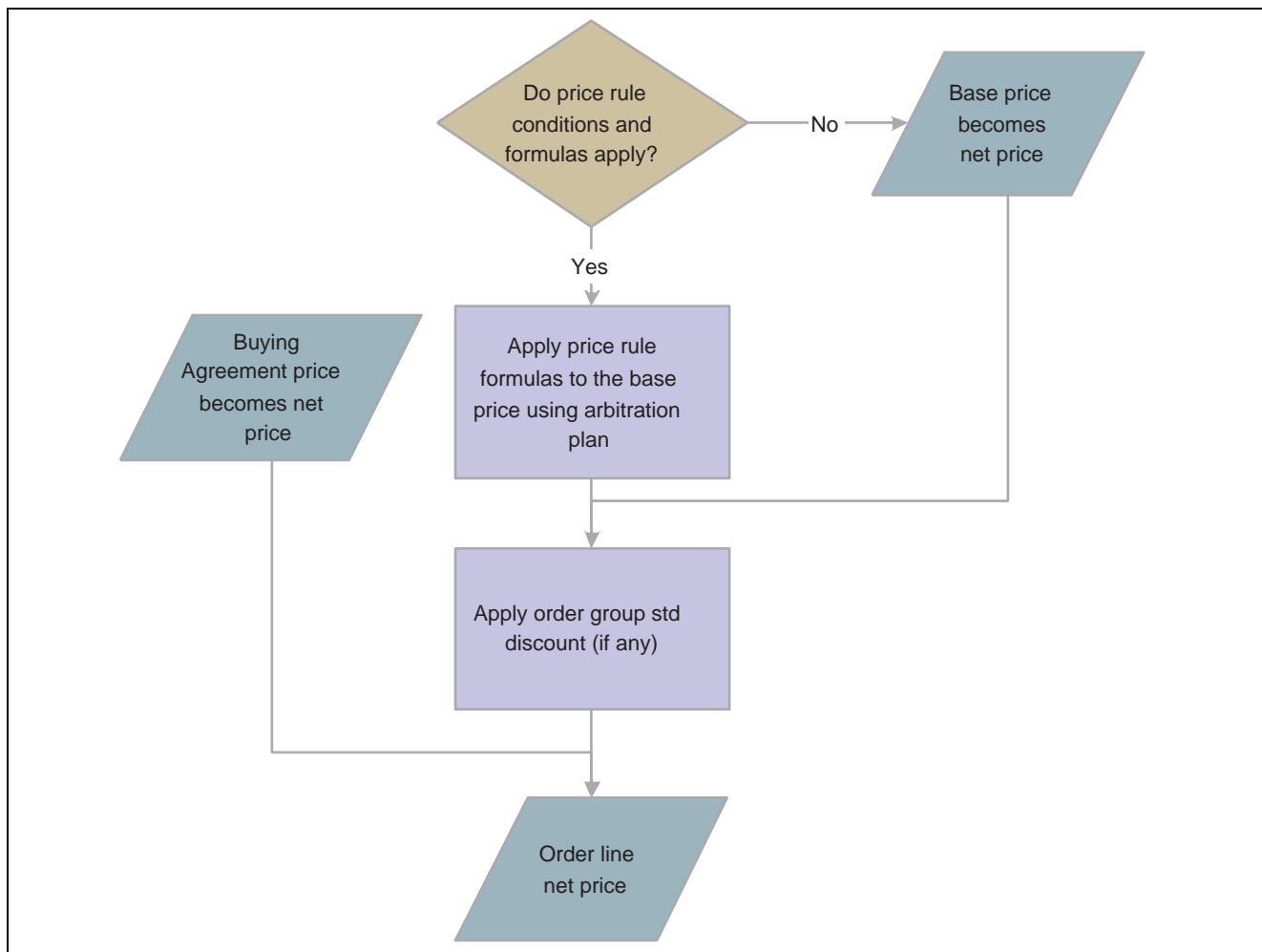


Diagram of sales order pricing (2 of 2)

Period-to-Date Pricing

Use period-to-date pricing to calculate price adjustments based on sales order totals across a predefined time frame, as opposed to within a single sales order. Price adjustments are applied only to the current sales order or sales order line, but the criteria used to determine a price formula match include order totals for multiple sales order for the current sold-to customer.

Reprice or Change Orders

Only the current sales order will be repriced. When a sales order is repriced, it will take into account only those period to date sales order totals that were entered prior to the current order that is being repriced. Any change to a sales order, which may affect period-to-date pricing, will be reflected in the current sales order and in any subsequent repricing or new sales orders.

Period-To-Date Caps

A warning message is displayed if a sales order is entered that goes over the last price formula for a period-to-date adjustment. You can split the sales order line into two lines to receive as much of an adjustment as possible. A price formula cap is the highest formula value of the last price formula associated with the price rule.

Consider this example: A period-to-date price rule is created for customer USA01 and product ID 10001. The price formula is for 1 USD to 10,000 USD. There have been a number of sales orders for this customer and product totaling 9,000 USD. A new sales order for customer USA01 and product 10001 is entered with an order quantity of 10, which puts the cumulative orders over 10,000 USD. If there are no other price formulas on this price rule (over 10,000 USD), a warning is issued to the CSR that 1000 USD is left on the period-to-date price rule. The CSR can create two order lines to maximize the adjustment for the customer:

- 1 for 1000 USD or less.
- 1 for the remaining quantity.

View Period-to-Date Information During Sales Order Entry

You can review the period-to-date price adjustments for a sales order from the Price Rule Audit page on the order line or schedule. The period-to-date adjustments will display with the other standard price adjustments and will be flagged as a period-to-date adjustment.

You can preview other price adjustments for period-to-date pricing on the Price and Availability page by entering an Order Management business unit and sold to customer along with the product, quantity, and other order information.

Establish the Start Date For Period-To-Date Pricing

Period-to-date totals are derived from the ORD_SCH_ARCH table. If you are archiving sales orders, they should be left in the ORD_SCH_ARCH and ORD_PPRC_SET tables until the current period for period-to-date pricing has expired. Canceled schedules will not be included.

Setting Up Period-To-Date Pricing

Perform the following steps to set up period-to-date pricing so that price adjustments can be based on a customer's period-to-date sales order totals.

1. Use the Sales Calendar page to define the pricing year.
2. Select the calendar to use on the Order Management Setup business unit page.

If PeopleSoft Promotions Management is installed, you will be prompted to use period-to-date pricing after saving the business unit. The system will search for the Calendar ID from Promotions Management.

3. Select the Period-To-Date option on the Price Rule — Formulas page.

Note. If PeopleSoft Promotions Management is installed and you wish to use period-to-date pricing, you can select the Period To Date Totals Only check box in the Promotion Limitations group box when defining your merchandising activities for a customer promotion, or in the Allowance Limitations group box when defining your discounts for a national allowance.

Weight and Volume Pricing

To encourage customers to order in full truck, pallet, or container, you can monitor and offer order discounts based on the weight or volume of the order when setting up price rules. You must also use estimated shipments if pricing by weight or volume.

You can enter the weight and volume option (arbitration plan) on the General Information - Sold To Options page. The weight and volume option is used as the default weight and volume arbitration plan on the Sold To section of the Order Entry Form during order entry. If there isn't a weight and volume option entered on the Order Entry Form page, the system displays a warning message, alerting the clerk that weight and volume pricing is being used for the Order Management business unit and that a weight and volume option must be selected so that the system can calculate the weight and volume pricing.

You can view the weight and volume pricing adjustments on the Estimated Shipments page. Use the Shipment Price Adjustments page to view the price rule information for weight and volume pricing.

Note. Weight and volume will be calculated when the order is saved. If weight and volume was calculated manually, it will be recalculated at save time.

See Also

PeopleSoft Order Management 8.8 PeopleBook, “Maintaining Order Header and Line Information”

Establishing Price-By Key and Price-List Fields

The section provides an overview of PeopleSoft Enterprise Pricer setup and discusses how to:

- Define Price-by Keys.
- Define price list fields.

Understanding PeopleSoft Enterprise Pricer Setup

When setting up PeopleSoft Enterprise Pricer, you must establish price-by key fields and price-list fields for each transaction to be priced. This data is delivered as part of the standard pricing implementation, but the person administering PeopleSoft Enterprise Pricer should know these areas are available for customizations. In general, these pages won't be accessed ; however, it's important that you understand how these pages are used to create your pricing structure.

The Transaction Price-by Keys page is used to define the fields available to define price rule conditions (used to match a transaction). All delivered price-by keys are available at implementation time. You may deselect any field.

The price list fields are used to define which fields can be used to attach a price list to a transaction. A predefined list of fields is delivered with pricing.

The list of price-by keys or price list fields can be expanded if PeopleSoft Enterprise Pricer is configured. Any configuration should be completed by a knowledgeable PeopleSoft application developer or IT person.

Common Element Used in This Section

Transaction to be Priced	Determines the appropriate list of price-by keys to use to price transactions. Values are: <i>BA (Buying Agreement):</i> Used to price buying agreement transactions in PeopleSoft Order Management.
---------------------------------	---

CA (Contract): Used to price contact transactions in PeopleSoft Contracts.

OC (Order Capture): Used to price transactions in PeopleSoft Order Capture.

Note. This transaction does not display in the PeopleSoft Supply Chain Management installation.

SO (Sales Order): Used to price online sales order and quote transactions in PeopleSoft Order Management.

LP (Weight & Volume Pricing): Used for weight and volume pricing on the sales order and quote in PeopleSoft Order Management.

Pages Used to Establish Price-by Key and Price-List Fields

Page Name	Object Name	Navigation	Usage
Price-by Key Field	EOEP_APPKEY_FIELD	Setup Financials/Supply Chain, Utilities, Register Pricing Keys, Transaction Price-by Keys	Use to select the price-by fields that can be used to price the transaction.
Price List Fields	EOEP_APPLIST_FLDS	Setup Financials/Supply Chain, Utilities, Register Pricing Keys, Transaction Price-by Keys	Use to select valid price-list-related business objects that are used when creating price lists and used to define the price list lookup method.

Defining Price-by Keys

Access the Price-by Key Field page.

Price-by Key Field		Price List Fields	
Transaction	Description		
LP	Weight & Volume Pricing		

Price-by Key Fields			Customize	Find	View All	First	1-12 of 12	Last
Record	Field Name	Description	Prompt Table					
EOEP_DERIVED_WK	CUSTOMER_GROUP	Customer Group	CUSTGP_PRC_VW					
ORD_EST_SHIP	CARRIER_ID	Carrier ID	PRC_CARRIER_VW					
ORD_EST_SHIP	CARRIER_ID_EXP	Export Carrier ID	PRC_CARRIERX_VW					
ORD_EST_SHIP	COMMODITY_CD	Commodity Code	PRC_CMMOD_CD_VW					
ORD_EST_SHIP	FREIGHT_TERMS	Freight Terms Code	PRC_FRGT_TRM_VW					
ORD_EST_SHIP	FREIGHT_TERMS_EXP	Export Freight Terms Code	PRC_FRGT_TMX_VW					
ORD_EST_SHIP	INV_ITEM_ID	Item ID	PRC_MSTITEM_VW					
ORD_EST_SHIP	PRODUCT_ID	Product ID	PRC_PROD_ITM_VW					
ORD_EST_SHIP	SHIP_TO_CUST_ID	Ship To Customer	CUST_PRC_SHP_VW					
ORD_EST_SHIP	SHIP_TYPE_ID	Ship Via Code	PRC_SHIPMTHD_VW					
ORD_EST_SHIP	SHIP_TYPE_ID_EXP	Export Ship Via	PRC_SHPTYIDX_VW					
ORD_HDR_PRC_VW	SOLD_TO_CUST_ID	Sold To Customer	CUST_PRC_SLD_VW					

Build Price-by Key Fields

Price-by Key Field page (1 of 2)

▼ Select Price-by Key Fields			
Select	Record	Field Name	Description
<input type="checkbox"/>	CA_CONTR_HDR	BUSINESS_UNIT	Business Unit
<input type="checkbox"/>	CA_CONTR_HDR	CONTRACT_NUM	Contract
<input type="checkbox"/>	CA_CONTR_HDR	CONTRACT_TYPE	Contract Type
<input type="checkbox"/>	CA_CONTR_HDR	REGION_CD	Region Code
<input type="checkbox"/>	CA_CONTR_HDR	SOLD_TO_CUST_ID	Sold To Customer
<input type="checkbox"/>	CA_DETAIL	ADDR_SEQ_NUM_SHIP	Address Sequence Number
<input type="checkbox"/>	CA_DETAIL	PRODUCT_GROUP	Product Group
<input type="checkbox"/>	CA_DETAIL	PRODUCT_ID	Product ID
<input type="checkbox"/>	CA_DETAIL	SHIP_TO_CUST_ID	Ship To Customer
<input checked="" type="checkbox"/>	EOEP_DERIVED_WK	CUSTOMER_GROUP	Customer Group
<input type="checkbox"/>	EOEP_DERIVED_WK	PRODUCT_GROUP	Product Group
<input type="checkbox"/>	EOEP_DERIVED_WK	REGION_CD	Region Code
<input checked="" type="checkbox"/>	ORD_EST_SHIP	CARRIER_ID	Carrier ID
<input checked="" type="checkbox"/>	ORD_EST_SHIP	CARRIER_ID_EXP	Export Carrier ID
<input checked="" type="checkbox"/>	ORD_EST_SHIP	COMMODITY_CD	Commodity Code
<input checked="" type="checkbox"/>	ORD_EST_SHIP	FREIGHT_TERMS	Freight Terms Code
<input checked="" type="checkbox"/>	ORD_EST_SHIP	FREIGHT_TERMS_EXP	Export Freight Terms Code
<input checked="" type="checkbox"/>	ORD_EST_SHIP	INV_ITEM_ID	Item ID
<input checked="" type="checkbox"/>	ORD_EST_SHIP	PRODUCT_ID	Product ID
<input checked="" type="checkbox"/>	ORD_EST_SHIP	SHIP_TO_CUST_ID	Ship To Customer

Price-by Key Field page (2 of 2)

Price-by Key Fields

Displays the current price-by fields for the transaction. You may delete fields from this list to remove them from use in pricing the transaction.

Build Price-by Key Fields

Click to add fields to the Price-by Key Fields grid after selecting them from Select Price-by Key Fields grid.

Note. If a price-by field is currently assigned to a price rule or an arbitration plan, you cannot remove it from the list of values assigned to the pricing transaction.

Select Price-by Key Fields

Use to select additional price-by fields.

Note. There is no limit to the number of pricing keys that can be defined; however, performance can be impacted when the number of keys is increased.

Defining Price List Fields

Access the Price List Fields page.

Price List Lookup

Select how you want the system to perform price list lookup. Values are:

Consider all prices: The system considers all matching price lists based on the related business objects and price rules that you have attached to the price lists. It then selects the lowest price for the product.

Lookup in priority order: The system establishes the order for the price list lookup based on the values in the Price-by Key Fieldnames Priority section. Use this method to establish a hierarchical method for selecting the list price for the transaction. The system selects the first active price it finds.

Note. When using the hierarchical method, price rules tied to price lists are not used unless a price could not be found using the hierarchical method.

Note. If your price list and related objects do not require the definition of a complex price condition, it is recommended you use the price list related objects.

Key Field Code

Select price-by keys to define the valid related business objects for a price list. These are the values available to you as related business objects on the Price List Related Object page.

Priority

Establish a hierarchical order to price list lookups by entering a numeric value. This field is available only if you select *Lookup in priority order* in the Price List Lookup field.

Configuring PeopleSoft Enterprise Pricer

The general PeopleSoft Enterprise Pricer user should not have access to these pages. These pages are available to the PeopleSoft Enterprise Pricer developer to modify or configure the PeopleSoft Enterprise Pricer system data. You can configure the PeopleSoft Enterprise Pricer data entry pages, but this is not required for a standard implementation of PeopleSoft Enterprise Pricer. The system data described in this section are delivered for each pricing transaction implementation.

This section provides an overview and discusses how to:

- Configure price-by key fields.
- Configure application code options.

Warning! Changes made to the pages in this section are considered a customization and are not supported by PeopleSoft.

Understanding Application Code Options

The options for each transaction are delivered as system-data and appear on the online pricing pages. They also determine how PeopleSoft Enterpriser can be used to price each transaction. This table lists the options set up for each transaction.

	Contract	Order Capture	Sales Order, Quote, Buying Agreement	Weight and Volume
Valid Action Types	<ul style="list-style-type: none"> Discount/Surcharge Price Override Min/Max Target Discount Min/Max Target Price Min/Max Target Surcharge Price List Only Condition 	<ul style="list-style-type: none"> Discount/Surcharge Giveaway Min/Max Target Discount Min/Max Target Price Min/Max Target Surcharge Price Override Total Order Discount/Surcharge Price List Only Condition • 	<ul style="list-style-type: none"> Discount/Surcharge Giveaway (not on buying agreement) Price Override Total Order Discount/Surcharge Price List Only Condition 	Discount/Surcharge
Valid Adjustment Methods	<ul style="list-style-type: none"> Cascading Summed 	<ul style="list-style-type: none"> Cascading Summed 	<ul style="list-style-type: none"> Cascading Summed 	Summed
Valid Price Types	<ul style="list-style-type: none"> Extended Price Quantity 	<ul style="list-style-type: none"> Extended Price Quantity 	<ul style="list-style-type: none"> Extended Price Quantity 	<ul style="list-style-type: none"> Volume Weight
Transaction Code Options			<ul style="list-style-type: none"> Use Rule Distribution Accounts Use Payment Terms on Formula Use period-to-date Use Promotion Codes 	<ul style="list-style-type: none"> Use Rule Distribution Accounts Use Payment Terms on Formula
Valid Price Dates			<ul style="list-style-type: none"> Requested Arrival Date Order Date Schedule Ship Date 	<ul style="list-style-type: none"> Order Date Schedule Ship Date

In addition to the options defined for each application code that defines how PeopleSoft Enterprise Pricer prices the transaction, PeopleSoft SCM and CRM use the system differently. We discuss these differences below so you can determine the best method to use in your organization.

- PeopleSoft CRM uses the recurring and frequency flags when defining the price list. They also use product notes on the price list. These options are not available in PeopleSoft SCM.
- In PeopleSoft CRM, the OC application code defaults. In PeopleSoft SCM, you can choose the application code when you are setting up a price rule, price list, or arbitration plan.
- Discounts in PeopleSoft CRM are only off-invoice. PeopleSoft SCM uses off-invoice and bill-back adjustments.
- PeopleSoft CRM does not use payment terms and distribution accounting when pricing transactions.
- PeopleSoft CRM uses the Lookup in Priority Order and PeopleSoft SCM uses the Consider all Prices Price List Lookup option.

Pages Used to Configure PeopleSoft Enterprise Pricer

Page Name	Object Name	Navigation	Usage
All Price-by Key Fields	EOEP_KEYFLDS	Setup Financials/Supply Chain, Utilities, Register Pricing Keys, All Price-by Key Fieldnames	Select fields to use as price-by key fields for all PeopleSoft Enterprise Pricer implementations. The values are delivered as system data during installation.
Application Code	EOEP_APP_CODE	Setup Financials/Supply Chain, Utilities, Register Pricing Keys, Price Transaction Code	Configure the PeopleSoft Enterprise Pricer data entry pages for each application code and relate the transaction to another transaction.

Configuring Price-by Key Fields

Access the All Price-by Key Fields page.

Note. Adding data here is considered a customization.

Record Select the transaction record name for the price-by key field.

Field Name Select the transaction field name for the price-by key field.

Prompt Table Enter the record name of the prompt to be used for this price-by key field on the price rule and price list definition pages.

Configuring Application Code Options

Access the Application Code page.

Application Code

Transaction	*Description	Parent
SO	Sales Order	

▼ Valid Action Types [Customize](#) | [Find](#) | [View All](#) | [First](#) [◀](#) [1-6 of 6](#) [▶](#) [Last](#)

Action Type			
Discount/Surcharge	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>
Price Override	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>
Giveaway	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>
Total Order Discount/Surcharge	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>
Related Business Objects	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>
Price List Only Condition	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>

▼ Valid Adjustment Methods [Customize](#) | [Find](#) | [View All](#) | [First](#) [◀](#) [1-2 of 2](#) [▶](#) [Last](#)

Adjustment Method			
Cascading	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>
Summed	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>

▼ Valid Price Types [Customize](#) | [Find](#) | [View All](#) | [First](#) [◀](#) [1-2 of 2](#) [▶](#) [Last](#)

Price Type			
Extended Price	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>
Quantity	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>

Application Code page (1 of 2)

▼ Transaction Code Options [Customize](#) | [Find](#) | [View All](#) | [First](#) [◀](#) [1-4 of 4](#) [▶](#) [Last](#)

Options			
Use Rule Distribution Accounts	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>
Use Payment Terms on Formula	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>
Use Period-to-date	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>
Use Promotion Code	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>

▼ Valid Price Dates [Customize](#) | [Find](#) | [View All](#) | [First](#) [◀](#) [1-3 of 3](#) [▶](#) [Last](#)

Price Date			
Requested Arrival Date	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>
Order Date	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>
Schedule Ship Date	<input type="button" value="▼"/>	<input type="button" value="+"/>	<input type="button" value="−"/>

Application Code page (2 of 2)

Parent	Select a value if you want the transaction to inherit all of the attributes and price-by keys of the parent.
Valid Action Types	<p>Select valid price action types for the transaction and limit the available options during price rule and arbitration plan entry. The values that you select are available for the price rule price action type. Values are:</p> <p><i>Discount/Surcharge</i>: Applies a discount or surcharge to the line.</p> <p><i>Giveaway</i>: Applies a giveaway which can be based on the line or order.</p> <p><i>Min/Max Target Discount</i>: Compares the total discount adjustment and if outside the specified amount, applies a target discount.</p> <p><i>Min/Max Target Price</i>: Compares the price adjustment and if outside the specified range, applies a target price.</p> <p><i>Min/Max Target Surcharge</i>: Compares the total surcharge adjustment and if outside the specified range, applies a target surcharge.</p> <p><i>Price List Only Condition</i> : Used only to attach price lists to a transaction.</p> <hr/> <p>Note. It is recommended you use the price list related objects if you do not require a complex price rule condition.</p> <hr/> <p><i>Price Override</i>: Applies a new price.</p> <p><i>Total Order Discount/Surcharge</i>: Applies a discount or surcharge to the entire order.</p>
Valid Adjustment Methods	<p>This value determines how the system applies the adjustment for the <i>Discount/Surcharge</i> price action type.</p> <p><i>Cascading</i>: Applied as they are found. A second discount is applied to the previously discounted price, a third discount is applied to a price that has already been discounted twice, and so on. For example, if the system encounters two discounts: 10 percent and 20 percent to be taken off the list price of 100.00 USD, the system applies the discounts in the following manner: 10 percent off of 100.00 USD and 20 percent off of 90.00 USD. Thus, the unit price for the order schedule line would be 72.00 USD.</p> <p><i>Summed</i>: When the system finds multiple discounts, it adds them together and applies the discounts once. Thus, for the summed example, the system would apply discounts in this manner: the 10 percent and 20 percent discounts would be combined, for 30 percent off of 100.00 USD. The unit price for the order schedule line would be 70.00 USD.</p>
Valid Price Types	The values that you select here are available when you select the price rule price type. Values are: <i>Extended Price, Quantity, Weight, Volume</i> .
Transaction Code Options	The values that you select here cause the system to display the appropriate processing fields on the price rule pages. Values are:
	<i>Use Payment Terms on Formula</i> : Select the payment for each adjustment from the list of values on the Payment Terms page in PeopleSoft Billing that has the longest day or month increment. If the order or schedule has more

than one price rule with a payment term that qualifies for the order, the system selects the most favorable terms for the customer.

Use Period-to-date: Enables the system to use period-to-date pricing to calculate price adjustments based on transactions across a predefined time frame, rather than individual transactions.

Use Promotion Code: Use if PeopleSoft Promotions Management is installed and you want to tie promotions to the price rule.

Use Rule Distribution Accounts: View and create accounting distribution details for the adjustments on the price rule.

Price Date

Select the dates available to price the transaction from the available options:

Order Date: The date the order header is created. The system uses the current date as the default date on a sales order header, but you can enter another date.

Requested Arrival Date: The date your customer wants the order to arrive at their site. This option is used only by PeopleSoft Supply Chain Management installations.

Schedule Ship Date: The date the order line is scheduled to ship. The system calculates this date from the requested arrival date, using the transit lead time and exception ship dates, but you can enter another date. This option is used only by PeopleSoft Supply Chain Management installations.

CHAPTER 3

Using Pricing Data Messages

This section provides an overview and discusses how to:

- Publish data from PeopleSoft Enterprise Pricer.
- Review and correct pricing data.
- Load data into PeopleSoft Enterprise Pricer.

Understanding Pricing Data Messages

PeopleSoft Enterprise Pricer uses PeopleSoft's application messaging to exchange pricing data with another system. For example, you may be using PeopleSoft SCM and a third-party system and need to get the data back and forth. The messages can be used so you don't have to use the online pricing pages. The messages can also be used to integrate with third-party applications.

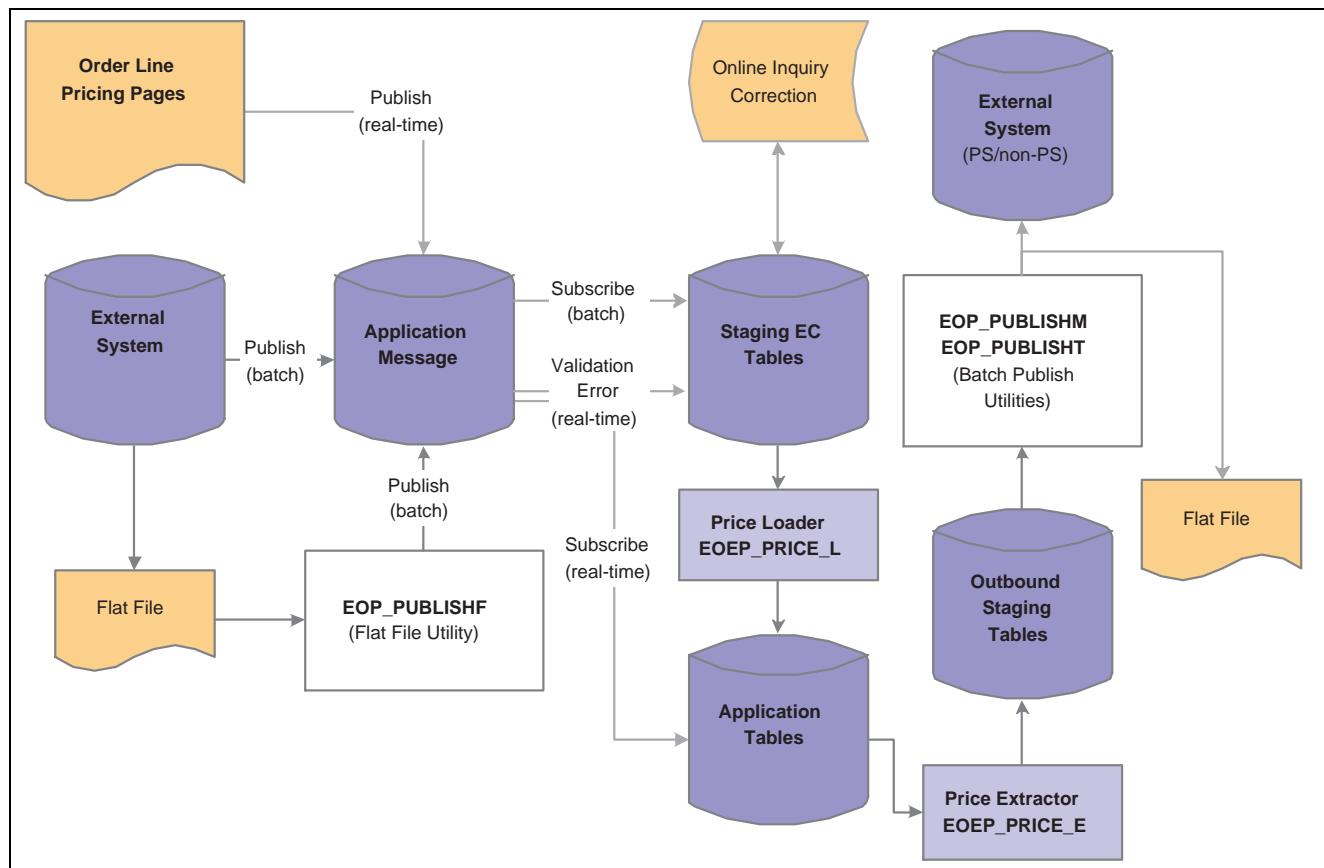
The following pricing messages are used for publishing and subscription.

Message	Description	Full Sync	Incremental Sync
Arbitration Plan (ARBITRATION_ PLAN_FULLSYNC, ARBITRATION_PLAN_ SYNC)	The messages includes all of the data in the Arbitration Plan tables.	Yes	Yes

Message	Description	Full Sync	Incremental Sync
Price List Detail (PRICE_LIST_DETAIL_FULLSYNC, PRICE_LIST_DETAIL_SYNC)	<p>The message includes only the detail table of price lists. It is provided so the you can separate the header and detail in different messages. For example, when there are large amounts of detail records, you may want to separate the header and detail into separate messages to achieve better performance.</p> <p>Note. The Price List Header message must already exist in the system. It is recommended that you run the Price List Header message first.</p>	Yes	Yes
Price List (PRICE_LIST_FULLSYNC, PRICE_LIST_SYNC)	<p>The message includes all the tables for price lists. It is suitable when the number of detail records for a price list is not enough to reduce performance.</p>	Yes	Yes
Price List Header (PRICE_LIST_HEADER_FULLSYNC, PRICE_LIST_HEADER_SYNC)	<p>The message includes only the header and price rule link tables. It is provided so you can separate the header and detail in different messages. Use the Price List Detail message for the detail data.</p>	Yes	Yes

Message	Description	Full Sync	Incremental Sync
Price Rule (PRICE_RULE_DATA_FULLSYNC, PRICE_RULE_DATA_SYNC)	Includes all the tables for price rules.	Yes	Yes
Price Rule Keys (PRICE_RULE_KEYS_FULLSYNC)	PeopleSoft Enterprise Pricer uses a couple of tables to store information about rules to help the rule selection process during pricing. They are updated as price rules are updated or changed. The price loader program will normally compute and update these tables. However, in case of full table sync, the existing data in these tables can be provided to avoid recomputation. If provided, data on this message will be loaded at the same time when price rule data is loaded.	Yes	No

The diagram below displays the business process for pricing messages.



Process Flow for PeopleSoft Enterprise Pricer Messages

Publishing Pricing Data Messages

There are several ways to publish the pricing data:

- **Online realtime:** This is associated with the online pages. When the data from the online pages is saved, the changed data is sent as messages to the external systems. The messages must be active for this to occur.
- **Batch publish:** Use the Pricing Data Publish page to select the pricing data to send to external systems. To use this option, Batch Publish Rules must be set up (samples rules are provided).

Note. On the Pricing Data Publishing page, you need to provide at least one value to select the data. All other fields are optional.

- **Full Table Publish:** All the pricing data can be published with this method. The pricing data in the target system will be replaced. To use this option, Full Data Publish Rules must be set up.
- **Flat files:** When setting up the Batch Publish Rule or Full Table Publish Rule, you have the option to save the published data to flat files. These flat files then can be copied to target system and loaded. You can use PeopleSoft's Inbound File Publish utility to load the file in the target system.

See Also

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Managing PeopleSoft Supply Chain Management Integration Points”

PeopleSoft Enterprise Integration PeopleBook, “Establishing Publish Rules Using the Publish Utility”

PeopleSoft Enterprise Integration PeopleBook, “Assigning Batch Publish Rules”

PeopleSoft Enterprise Integration PeopleBook, “Using the Publish Utility”

EIP Catalog: <http://www.peoplesoft.com/corp/en/products/technology/oif/index.asp>

Loading Pricing Data Messages

To update or load data into PeopleSoft Enterprise Pricer, the pricing data is sent via messages or flat files and is loaded into pricing staging tables.

The following table lists the pricing EIP staging tables and the map to application tables in PeopleSoft Enterprise Pricer:

EIP Staging Table	PeopleSoft Enterprise Pricer Application Table	Description
EOEP_ARBPLN_EC	EOEP_ARB_PLAN	Price Arbitration Plan
EOEP_ARBSEQ_EC	EOEP_ARB_SEQ	Price Arbitration Attributes
EOEP_RULE_EC	EOEP_RULE	Price Rule
EOEP_COND_EC	EOEP_CONDITION	Price Condition
EOEP_CONJ_EC	EOEP_COND_CONJ	Price Condition Conjunction
EOEP_FORM_EC	EOEP_FORMULA	Price Formula
EOEP_RDST_EC	EOEP_RULE_DST	Price Rule Distribution
EOEP_KVCNT_EC	EOEP_KEYVAL_CNT	Pricing Key Value Count
EOEP_RKVAL_EC	EOEP_RULEKEYVAL	Pricing Rule Key Values
EOEP_PLHDR_EC	EOEP_PRCLST_HDR	Price List Header
EOEP_PLIST_EC	EOEP_PRICE_LIST	Price List Detail
EOEP_RLLNK_EC	EOEP_RULLST_LNKk	Price List - Price Rule Link

Then the Pricing Data Load process (EOEP_PRICE_L) is run to move the data into PeopleSoft Enterprise Pricer. The Pricing Data Load process validates the data, sets defaults, and loads the valid data into the application tables.

If incoming data fails the validation, they will be left in the staging data. They can be reviewed and corrected by the error correction pages. It may be necessary to run the Pricing Data Load process more than one time to ensure that the data is corrected and moved from the staging tables.

The following list provides examples of the validation that is done by the Pricing Data Load process (EOEP_PRICE_L). The data in the examples below would be left in the staging tables and would not be loaded into the application tables.

- If the price rule is to be changed, the price rule must already exist in the target system. If the price rule is added, a price rule with the same keys must not already exist in the target system.
- The price condition must have valid product, customer, and business units. The price condition cannot be associated with an invalid price rule.
- Required fields must have valid values.

Note. If you are processing large-volumes of pricing data and you know that the data is correct, you can bypass the validation by de-selecting the Perform Data Validation option on the Price Loader run control page.

In case of realtime messages (messages that are published from the online pricing pages), the Pricing Data Load process (EOEP_PRICE_L) is executed automatically. If pricing is received as flat files from external systems, use the Flat Files Utility to load the data in the target system. The data is published locally and stored in the staging tables. Pricing Data Load process (EOEP_PRICE_L) is then run to load the data into the application tables.

Publishing Price Data

This section discusses how to use the Pricing Data Publish page.

Pages Used to Publish Pricing Data

Page Name	Object Name	Navigation	Usage
Pricing Data Publish	EOEP_PRICE_EXTRACT	Pricing Configuration, Pricing Data Exchange, Publish Pricing Data	Use to specify the pricing data to be extracted and to submit the process to extract the data.

Publishing Pricing Data

Access the Pricing Data Publish page.

Pricing Data Publish

Run Control ID: full [Report Manager](#) [Process Monitor](#)

Process Options

***Process Name:**

Arbitration Plan

				Customize	Find	First	1 of 1	Last
SetID	Transaction to be Priced	Arbitration Plan	Updated After Date					
1	SHARE <input type="button" value="Search"/>	SO <input type="button" value="Search"/>	RULE-1 <input type="button" value="Search"/>					

Price Rule

				Customize	Find	First	1-2 of 2	Last	
SetID	Price Rule	Updated After Date							
1	SHARE <input type="button" value="Search"/>	PM-00000000000000000002 <input type="button" value="Search"/>							
2	SHARE <input type="button" value="Search"/>	RETAIL <input type="button" value="Search"/>							

Price List

				Customize	Find	First	1 of 1	Last	
SetID	Price List ID	Currency Code	Updated After Date						
1	SHARE <input type="button" value="Search"/>	RETAIL <input type="button" value="Search"/>							

Last Run On: **Process Instance:**

Pricing Data Publish page

Process Name

Enables you to group messages to be published together. Set up the Process Name on the Batch Programs tab of the Batch Publish Rules page. For the messages to be processed together, enter the same process name for each message on the Batch Programs tab. Then select that process name on the Pricing Data Publish page. All those messages will be processed together.

Updated After Date

Use to select what data you want published by the last update date.

Arbitration Plan, Price Plan, Price List

You need to select at least one value to publish the message. You can enter additional values as needed.

Reviewing Pricing Data

This section provides an overview and lists the pages used to correct pricing data.

Understanding the Error Correction Pages

You can search for data in the staging tables for:

- Arbitration plans and Arbitration plan attributes
- Price rules
 - Price conditions
 - Price condition conjunctions
 - Price formulas
 - Price rule distributions
- Price Lists
 - Price List Details
 - Price list-Price rule links
 - Price list details without headers

From each inquiry page, you can drill down into the detail page to review and correct the error. After the errors are corrected, run the Pricing Data Load process (EOEP_PRICE_L) to move the data into the application tables.

Common Elements Used in this Section

Full Sync

Enter:

Y (yes) to include full sync messages.

N (no) to not include full sync messages.

Status

Select to further narrow the search criteria.

Search

Click the button to perform a search after entering search criteria.

Clear

Click the button to clear the search results.



Click the Update button to view and update the errors.

Delete

Click the button to delete the selected row from the staging tables. All of the related data (child data) will also be deleted. You will receive a warning message before the delete is processed.

Select this row

Use the radio button to select a row. Then use the links at the bottom of each page to drill down to the details for the data.

Pages Used to Review Pricing Data

Page Name	Object Name	Navigation	Usage
Arbitration Plan Inquiry	EOEP_ARB_PLAN_INQ	Pricing Configurator, Pricing Data Exchange, Correct Staging Errors, Arbitration Plan, Arbitration Plan Inquiry	Use to search for arbitration plan data in the staging tables.

Page Name	Object Name	Navigation	Usage
Price Arbitration Attributes	EOEP_ARB_SEQ_INQ	After selecting a row on the Arbitration Plan Inquiry page, click the Price Arbitration Attributes link.	Use to search for arbitration plan attribute data in the staging table.
Arbitration Plan Detail	EOEP_ARBPLN_EC_UPD	Click the Update button on the Arbitration Plan Inquiry page.	Use to view and correct the error on the arbitration plan.
Attribute Detail	EOEP_ARBSEQ_EC_UPD	Click the Update button on the Arbitration Plan Attributes page.	Use to view and correct errors on the arbitration plan attributes.
Price Rule Inquiry	EOEP_RULE_INQ	Pricing Configurator, Pricing Data Exchange, Correct Staging Errors, Price Rule, Price Rule Inquiry	Use to search for price rule data in the staging tables.
Price Rule Detail	EOEP_RULE_EC_UPD	Click the Update button on the Price Rule Inquiry page.	Use to view and correct the error on the price rule.
Price Conditions	EOEP_COND_INQ	After selecting a row on the Price Rule Inquiry page, click the Price Conditions link.	Use to view price condition data.
Price Condition Detail	EOEP_COND_EC_UPD	Click the Update button on the Price Conditions page.	Use to view and correct the error on the price condition.
Price Condition Conjunctions	EOEP_CONJ_INQ	After selecting a row on the Price Rule Inquiry page, click the Price Condition Conjunctions link.	Use to view condition conjunction data for the price rule.
Condition Conjunction Detail	EOEP_CONJ_EC_UPD	Click the Update button on the Price Condition Conjunctions page.	Use to view and correct the error on the condition conjunction for the price rule.
Price Formulas	EOEP_FORM_INQ	After selecting a row on the Price Rule Inquiry page, click the Price Formulas link.	Use to view price formula data for the price rule.
Price Formula Detail	EOEP_FORM_EC_UPD	Click the Update button on the Price Formulas page.	Use to view and correct the error on the price formula for the price rule.
Price Rule Distributions	EOEP_RDST_INQ	After selecting a row on the Price Rule Inquiry page, click the Price Rule Distributions link.	Use to view price rule distribution data for the price rule.
Price Rule Distribution Detail	EOEP_RDST_EC_UPD	Click the Update button on the Price Rule Distributions page.	Use to view and correct the error on the price rule distribution for the price rule.

Page Name	Object Name	Navigation	Usage
Price List Inquiry	EOEP_PRCLST_H_INQ	Pricing Configurator, Pricing Data Exchange, Correct Staging Errors, Price List, Price List Inquiry	Use to search for price list data in the staging tables.
Price List	EOEP_PLHDR_EC_UPD	Click the Update button on the Price List Inquiry page.	Use to view and correct the error on the price list header.
Price List Detail Inquiry	EOEP_PRCLST_D_INQ, EOEP_PRCLST_DH_INQ	After selecting a row on the Price List Inquiry page, click the Price List Detail Inquiry link.	Use to search and view price list details. Note. Note. For price list details that do not have corresponding headers, for example data from Price List Detail only messages, click the Search Price List Details Without Headers link.
Price List Detail	EOEP_PLIST_EC_UPD	Click the Update button on the Price List Detail Inquiry page.	Use to view and correct the error on the price list detail.
Price List — Price Rule Links	EOEP_RLLNK_INQ	After selecting a row on the Price List Inquiry page, click the Price List — Price Rule link.	Use to search and view price rules for the price list.
Price Rule Link Detail	EOEP_RLLNK_EC_UPD	Click the Update button on the Price List — Price Rule Links page.	Use to view and correct the error on the price rule for the price list.

Loading Data into PeopleSoft Enterprise Pricer

This section discusses how to use the Pricing Data Load process EOEP_PRICE_L).

Pages Used to Load Pricing Data

Page Name	Object Name	Navigation	Usage
Price Loader	EOEP_PRICE_LOAD	Pricing Configuration, Pricing Data Exchange, Load Pricing Data, Pricer Loader	Use to load pricing data from the staging tables into the application tables.

Using The Price Loader Process

Access the Price Loader page.

Pricing Data to Load Select: *Arbitration Plan, Price List or Price Rule*. to load the pricing data individually. You can also select *All* to load all the pricing data.

Perform Data Validation Select this option to validate the data during the loading process.

Load Full Sync Data

Check this option if you want to process data from full sync messages. Data received after the last full sync message will not be processed, and data received prior to the full sync message will be discarded. If this option is not checked, only incremental sync data received prior to any full sync message will be processed.

For example, the following messages are received in this order: Price Rule incremental sync and Price Rule full sync, and Price Rule incremental sync. If the Load Full Sync Data option is not selected, the first Price Rule incremental sync message will be processed. If the option is selected, the Price Rule full sync message will be processed. Since the first Price Rule incremental sync was received prior to the full sync message, it will be discarded. Also, because the last Price Rule incremental sync message is received after the full sync message, it will not be selected for process. After the Price Rule full sync message is processed, the last Price Rule incremental sync message can be processed from this page.

Note. It's recommended you process the messages as soon as they are received.

Full Sync Error Option

This option is available only if Load Full Sync Data is selected.

If the process encounters errors with the data, select whether :

- No Data Will Be Loaded: All of the data will be left in the staging tables. Existing data in the application tables will not be changed.
- Valid Rows Will Be Loaded: If this option is selected, the application table will be replaced with valid data from the full sync message. Any invalid full sync data will be left in the staging table with the full sync flag turned off so you can correct them and load them later as incremental sync data.

CHAPTER 4

Creating Price Lists

This section provides an overview of and discusses how to set up price lists.

Understanding Price Lists

Price lists are groups of date-controlled product prices that are defined by currency code and linked to related business objects or price rules. These product prices are intended to replace the product list price when they are associated with a transaction by way of the related business objects or price rules.

Price list related business objects are objects to which a price list can be associated. The business objects are a subset of price-by fields that are already defined for the transaction. A price list can have more than one related business object, such as customer, customer group, product ID, and business unit.

The system uses the appropriate pricing transaction to determine the available price list related business objects. The system attempts to match a particular transaction to one or more price lists based on the transaction values and the price list related business objects. For example, if you are taking an order for customer ABC and customer ABC is defined as a related business object for a specific price list, that price list applies to this order. Furthermore, if any product on the order appears on this price list, the price from the price list is used as the base price for all further pricing calculations, instead of the product's list price. If more than one applicable list is found, the price list lookup that is defined for that transaction on the Price By Key Field page determines which price is used:

- Lookup in priority order.

The system performs a search to match the related business objects in the defined priority order and then selects the first list price that it finds.

Note. This option is used in PeopleSoft Customer Relationship Management (PeopleSoft CRM).

- Consider all prices.

The system performs a search to match the related business objects and their price lists and then selects the lowest price.

If the system does not find a base price from the price lists, it searches for a base price in the product list price definition (assign list price). If the system does not find a product price in the transaction currency, it searches for a product price in the base currency that is defined for the transaction.

After locating the base price for the product, the system performs a separate search of the price rules to find the appropriate adjustments to that price. If you do not set up price lists, or the system fails to find the product on an active relevant list, the system uses the list price that is defined for the product as the default base price for any further price adjustments.

Note. This option is used in PeopleSoft Supply Chain Management (PeopleSoft SCM).

Setting Up Price Lists

To define price lists, use the Price List component.

This section lists common elements and discusses how to:

- Establish price lists.
- Enter related objects.

You can use the Price List report to review price lists.

See [Appendix A, “PeopleSoft Enterprise Pricer Reports,” page 81](#).

Common Elements Used in This Section

Status	Values are: <i>Active</i> : Product prices on this list automatically supersede the product list price in transactions involving any related business objects. <i>Inactive</i> : This list is ignored when calculating product prices.
Product	Use to search for a product ID, enter a new product ID, and view the product IDs that are in a price list.
Unit of Measure	Each list price is defined by the unit of measure (UOM). The UOM must be a valid unit of measure for that product as defined in the product master.

Pages Used to Set Up Price Lists

Page Name	Object Name	Navigation	Usage
Price List Search	EOEP_PLST_SRCH_PG	Pricing Configuration, Create Pricing Information, Price List Advance Search	Use to search price lists by related business objects.
Price List	EOEP_PRICE_LIST	Pricing Configuration, Create Pricing Information, Price List Maintenance	Use to define a price list. You can set up price lists in multiple currencies and create start and end dates for each product's price.
Product Notes	EOEP_PRC_LIST_NOTE	Click the Recurring Note button on the Additional Information tab of the Price List page.	Use to view notes that are associated with the product. Note. This option is only used in PeopleSoft CRM.
Related Objects	EOEP_PRCLST_ATTCH	Click the Related Objects tab on the Price List page.	Use to associate a price list with related business objects, such as a customer, customer group, or region, and to associate price rules directly to a price list.
Search	EOEP_SEARCH_PAGE	Click the Find External Resource button on the Related Objects page.	Search for existing values for the field names on the Related Objects page.

Establishing Price Lists

Access the Price List page.

Price List

Price List ID	Currency Code	SetID
RETAIL	USD	SHARE

*Description: Retail Price List *Status: Active

Search

Product ID: begins with

Description: contains

Add Product

New Product ID:

Pricing Information

Pricing Information		Additional Information	Customize	Find	View All	First	1 of 1	Last
Product ID	Description	*UOM	Start Date	End Date	List Price	<input type="button" value="Add"/>	<input type="button" value="Delete"/>	
		<input type="text"/> <input type="button" value="Search"/>	11/08/2003 <input type="button" value="Calendar"/>			<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	

Price List page

Currency Code

Use to establish the same price list with the same price list ID in multiple currencies. The price list is considered if the transaction is entered in the same currency as that of the price list.

Note. In PeopleSoft CRM, if a price is not available in a price list using the transaction currency, but a price list is available for the base currency, the system accesses the price from the price list in the base currency and converts it to the transaction currency. The currency is converted as long as conversion rates are defined between the transaction and base currency. You must also define rate types for the customer and business unit for the currency conversion.

Search**Search**

Click to select the price list detail based on the search criteria and view additional price list information. The price list detail appears in the Pricing Information tab. Click the Clear Search button to remove the search criteria.

Description

Search for products by using elements of the product description or product ID.

Add Product**New Product ID**

Use to add a product ID to price list. Add additional information for the product in the Pricing Information group box.

Add

Click after you enter the product ID. This adds the product to the price list.

Note. New products cannot be added to price lists created by the Pricing Load process in PeopleSoft Promotions Management.

Pricing Information Tab

Select the Pricing Information tab.

Error

If an error exists in the price list definition, a red square box appears in this column. This field is only visible if an error exists. For example, if you enter an invalid value, the line is marked as an error. Correct the error as necessary.

UOM (unit of measure)

Use to define a list price for a particular UOM for that product.

Start Date and End Date

Use to define the effective period (start and end date) for the list price entry.

List Price

Use to enter a list price for the products that are on the price list.

Frequency

Use to select a recurring frequency in PeopleSoft CRM Order Capture. If you select this option, the amount that is in the List Price field represents a recurring charge. If not, the list price represents a onetime charge.

Options include: *Annually*, *Daily*, *Monthly*, *Quarterly*, and *Weekly*.

Note. This option is not used in PeopleSoft SCM installations.

Additional Information Tab

Select the Additional Information tab.

Recurring Note

Click this button to enter and view notes relating to recurring charges for the product. These notes are informational only and separate from the standard product notes that are defined in the product definition component.

Note. This option is only available in PeopleSoft CRM installations.

Protected

If you select the check box, the system does not apply adjustments to the base list price. The price-protected flag on the transaction is activated.

Note. If a product with the same price is on two different price lists and one is price protected, the price-protected one is used in the transaction.

Entering Related Objects

Access the Related Objects page.

Price List ID	Currency Code	SetID	
RETAIL	USD	SHARE	
Description	Retail Price List	Status	Active

Related Business Objects

Transaction:	Find View All	First	1 of 1	Last
<input type="text"/>	<input type="button" value="Find"/>	<input type="button" value="First"/>	<input type="button" value="1 of 1"/>	<input type="button" value="Last"/>

Related Price Rule

Rule	Description	Customize	Find	First	1-2 of 2	Last
PL-09	PL-09	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="First"/>	<input type="button" value="1-2 of 2"/>	<input type="button" value="Last"/>
RETAIL	RETAIL	<input type="button" value="+"/>	<input type="button" value="-"/>			

Related Objects page

Transaction

You select a transaction to define the related objects to associate with the price list. The transaction determines the list of available values to select in the Related Objects group box.

Note. Related business objects cannot be maintained for price lists created by the Pricing Load process in PeopleSoft Promotions Management.

Field Name

Select a value to tie a business object to the price list. The values are defined when you establish the price-by keys for each transaction on the Price-by key Fields page.

Identifier

Enter values for the business object. You can enter multiple values by separating them with a comma. Click the Find External Resource button to search for values instead of manually entering them.

If the field name and identifier criteria match those that are on a particular transaction, this price list is considered for that transaction.

Rule

Select a price rule to tie the price list to the price rule.

A price rule can be directly associated with the price list. The price rule conditions define the part of the transaction that must match in order for this price list to be considered at pricing time.

CHAPTER 5

Creating Price Rules

This section provides an overview of and discusses how to set up price rules.

Understanding Price Rules

The price rule defines the conditions of the transaction that must be met in order for the adjustments to be applied to the base price. The price rule is made up of one or more price conditions and one or more price formulas. The price condition defines the set of circumstances that make a price rule applicable to a transaction. The price formula defines the actions, which take place when the pricing conditions are met.

Note. Price Rules generated by the Pricing Load process in PeopleSoft Promotions Management are unavailable for entry or update. If you need to make changes to these price rules, you must update the customer promotion or national allowance in PeopleSoft Promotions Management and then run the Pricing Load process to load the new changes.

Setting Up Price Rules

To define price rules, use the Price Rule component.

This section discusses how to:

- Establish price rule conditions.
- Establish price rule formulas.

Understanding how to set up a Price Rule Condition

Enter the conditions for the price rule in basic or advanced mode. Basic mode enables you to create price rules by using the “and” operator. Advanced mode enables you to create more complex conditions. You can use the “Or” operator in addition to the “And” operator. Advanced mode enables you to enter the values directly for the price-by fields without going through the search or prompt page for the field. It also enables you to build complex conditions by using other conditions that are already defined for the rule. Advanced mode is the default setting for the page.

To add a price rule condition in basic mode:

1. For a new price rule, select a transaction.

This transaction determines the valid price-by field names that are available for the conditions.

Note. In PeopleSoft Customer Relationship Management (PeopleSoft CRM) installations, the field appears by default and is unavailable for entry.

2. Change the default status from *Pending* to *Deployed*, *Inactive*, or *Ready to Test*.

Pending: Price rule is incomplete. Price rule validation is not performed when you save the rule.

Deployed: Price rule is available for use in price calculations.

Ready to Test: Price rule is complete but is not available for use in price calculations. It can only be used in the simulator.

Inactive: Price rule is not active. The rule is not available for any price calculations. Use to deactivate a rule that was previously in use.

3. Enter a description for the price rule.

This is a free-form text field.

4. Enter a short description.

A truncated version of the long description appears by default.

5. Select a field name in the Rule Conditions group box.

Enter multiple field names by inserting a new row for each field name. In Basic mode, the system automatically joins the two conditions with the “and” operator.

6. Click the Search button to select values for the field names.

When you click the Search button, the system transfers you to a page from which you can search for and select values for the field name that you select. Values that are already selected for the condition automatically appear as selected. You can restrict the search further by entering additional search data in the fields that are provided at the top of the page and clicking the Search button. Select one or more values that you wish to apply to the rule condition and click OK.

The condition appears in the Rule Definition section. The system displays the rule definition based on the last condition that you built. Any additions are added to the existing condition with the AND condition.

To add a price rule condition in advanced mode:

1. For a new price rule, select a transaction.

This transaction determines the valid price-by field names that are available for the conditions.

Note. In PeopleSoft CRM installations, the field appears by default and is unavailable for entry.

2. Change the status from *Pending* to *Deployed*, *Inactive*, or *Ready to Test*.

Pending: Price rule is incomplete. Price rule validation is not performed when you save the rule.

Deployed: Price rule is available for use in price calculations.

Ready to Test: Price rule is complete but is not available for use in price calculations. It can only be used in the simulator.

Inactive: Price rule is not active. The rule is not available for any price calculations. Use to deactivate a rule that was previously in use.

3. Enter a description for the price rule.

This is a free-form text field.

4. Enter a short description.

A truncated version of the long description appears by default.

5. Select a field name in the Rule Conditions group box.

You may enter multiple field names by inserting a new row for each new field name.

6. Enter the field name values directly in the Identifier field or click the Search button.

Enter multiple values by separating the values with commas. Alternatively, you can click the Search button. The system transfers you to a page from which you can search and select values for the field name that you select for the condition. Values that are already selected for the condition automatically appear as selected. You can further restrict the search by entering additional search data in the fields that are provided on top of the page and clicking the Search button. Select the fields that you wish to apply to the rule condition and click OK.

The field name and value conditions that are defined in the Rule Conditions section appear in the Combined Conditions section. The individual rows in the Combined Conditions section serve as a foundation for you to create more complex conditions.

7. Select the rows in the Combined Conditions section that you want to use to create a more complex condition.

8. Select either the “and” or “or” operator.

9. Click the Build Rule Definition button to create the advanced price rule.

The system automatically inserts the new condition in the Combined Conditions section.

You can create more complex conditions by selecting the new rows in the Combined Conditions section, selecting an operator, and clicking the Build Rule Definition button until you create the desired rule definition.

Understanding how to set up Price Formulas

Use the following scenarios to correctly set up price formulas.

Discount/Surcharge Scenario

Create a price rule where Customer 1005 will receive a discount amount of 10.00 euro dollars for purchasing between 1-10 units of product 10050. If 11-20 units is purchased, the customer will receive a 20.00 euro dollar discount. If more than 20 units are purchased, the customer will get a 3 percent discount. This is valid for the period through the end of the year.

To set up the scenario on the Price Rule, complete the following steps:

1. Add Sales Orders as the Transaction on the Rule Attributes section of the Conditions page. Enter a Description and change the Mode to Basic.
2. Add Sold to Customer 1005 and Product ID 10050 to the Rule Conditions section of the Conditions page.
3. On the Rule Attributes section of the Formula page, select Discount/Surcharge as the Price Action Type, Quantity as the Price Type, and Cascading in the Cascading/Summed field.
4. On the Formula Definition section of the Formula page, enter the lines as follows (use EA as the UOM, Euro as the currency, and Discount as the Charge Type):

Start Date	End Date	Low Qty	High Qty	%/Amt Type	Amount/%
Today's date	12/31/2003	1	10	Amount	10
Today's date	12/31/2003	11	20	Amount	20
Today's date	12/31/2003	21	9999999999	Percent	3

Note. Remember to save the price rule and set the status to either Deployed to Ready to Test.

Giveaway Scenario

Create a price rule where Customer 1005 will receive a product giveaway of one Product ID 10049 per order for purchasing between 20-49 units of product 10050. This is valid for the period through the end of the year.

To set up the scenario on the Price Rule, complete the following steps:

1. Complete the first two steps in the scenario above.
2. On the Rule Attributes section of the Formula page, select Giveaway as the Price Action Type, and Quantity as the Price Type.
3. On the Formula Definition section of the Formula page, enter the line to qualify for the giveaway (use EA as the UOM, Euro as the currency, and Discount as the Charge Type):

Start Date	End Date	Low Qty	High Qty
Today's date	12/31/2003	20	49

4. On the Giveaway tab of the Formula page, enter the giveaway information

Product ID	UOM Promo	Quantity	Giveaway Type
10049	EA	1	Per Order

Pages Used to Set Up Price Rules

Page Name	Object Name	Navigation	Usage
Price Rule Search	EOEP_RULE_SRCH_PG	Pricing Configuration, Create Pricing Information, Price Rule Advanced Search, Price Rule Search	Search by condition.
Conditions	EOEP_CONDITION	Pricing Configuration, Create Pricing Information, Price Rules Maintenance	Select the price-by fields, values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
Formula	EOEP_FORMULA	Pricing Configuration, Create Pricing Information, Price Rules Maintenance	Define the actions that take place when the price rule conditions are met.
Search	EOEP_SEARCH_PAGE	Click the Search Push Button on the Conditions page.	Search for values for the selected price-by field in the price rule condition.
Promotion Codes	PPRC_PROMOTION	Pricing Configuration, Create Pricing Information, Promotion Codes	Use to enter values for promotions. This page is only available if PeopleSoft Promotions Management is not installed.

Establishing Price Rule Conditions

Access the Conditions page.

Conditions		Formulas										
Transaction	Price Rule	Description	SetID									
Sales Order	PM-0000000000000004	Promotions	SHARE									
Mode: Advanced												
Rule Attributes <table border="1"> <tr> <td>Status</td> <td>Deployed</td> </tr> <tr> <td>Description</td> <td>President's Day Special</td> </tr> <tr> <td>Description</td> <td>Promotions</td> </tr> </table>				Status	Deployed	Description	President's Day Special	Description	Promotions			
Status	Deployed											
Description	President's Day Special											
Description	Promotions											
Rule Conditions <div style="text-align: right;"> Customize Find First 1-2 of 2 Last </div> <table border="1"> <thead> <tr> <th>Field Name</th> <th>Identifier</th> <th>Match these Values</th> </tr> </thead> <tbody> <tr> <td>Product ID</td> <td>10000</td> <td> Men's Long Sleeve Bike Jersey</td> </tr> <tr> <td>Sold To Customer</td> <td>1000</td> <td> Alliance Group</td> </tr> </tbody> </table>				Field Name	Identifier	Match these Values	Product ID	10000	Men's Long Sleeve Bike Jersey	Sold To Customer	1000	Alliance Group
Field Name	Identifier	Match these Values										
Product ID	10000	Men's Long Sleeve Bike Jersey										
Sold To Customer	1000	Alliance Group										
Combined Conditions												
Rule Definition <p>The transaction contains the following:</p> <p>Sold To Customer equal to any in the list Alliance Group AND Product ID equal to any in the list Men's Long Sleeve Bike Jersey</p>												

Conditions page

Mode

Use to determine the data entry method.

Basic: Enables you to search for values for the field names that you select. The Match These Values column is populated with the description of the values that you select after you made the selection. Rule conditions are automatically joined with the “and” conditional operator.

Advanced: Basic mode plus additional data entry features. Enables you to manually enter values for the identifiers or search for identifiers. If you add them manually, separate the values by a comma without a space between values. The Match These Values column is populated with the description of the identifiers that you enter.

The Combined Conditions grid is available and automatically populated with the basic field name and value rule conditions. The Combined Conditions grid enables you to create rule conditions that can be combined into more complex conditions. You can use logical “and” or “or” operators.

This mode is the default.

Change to Advanced mode
and Change to Basic mode

Use to change the mode.

Save Price Rule As

Click the button to save the price rule to a new price rule.

Rule Attributes

Transaction

Select a value from the available options to create a new price rule and populate the list of values for the field names.

This field is only visible in add mode. Once the rule is created for a transaction, the transaction cannot be changed.

Note. In PeopleSoft CRM installations, the field appears by default and is unavailable for entry.

Status

Values are:

Deployed: Activates the price rule, so that it is used to determine price adjustments. You must enter data on the Formulas page before you can save the price rule in this status. You can also use the simulator to test price scenarios in this status.

Inactive: The price rule is not active. The rule is not available for any price calculations. Use to deactivate a rule that was previously in use.

Pending: This status appears by default. You can save the price rule in this status without adding data on the Formulas page. Use this status when you want to save the price rule, but you don't want the system to process any edits on the rule. You cannot use a rule in this status in the simulator, and price rule validation is not performed when you save the rule.

Ready to Test: Use this status to test the rule with the simulator, but the rule is not available for use in price calculations.

Description

Use to describe the rule.

Short Description

Use for the short description of a rule. The first 20 characters of the description appear by default. The field is used as the label on pages and inquiries.

Rule Conditions

Error

If an error exists in the price rule definition, a red square box appears in this column. Correct the error. This field only appears if an error exists.

Field Name

Select the price-by field to use with the rule condition. The valid list of price-by fields is established on the Transaction Price By Keys page by the PeopleSoft Enterprise Pricer system administrator. The list of fields that is available when you create the price rule is determined by the transaction.

Identifier

Use to quickly enter values for the price-by fields, use a comma to separate multiple values. This option is available if you are using the Advanced mode only.

Search Push Button

Use to search for valid price-by field values.

Note. If you have previously selected values, those values remain selected. You can restrict the search further by entering the appropriate ID and description values at the top of the search page.

Combined Conditions

In the advanced mode, the field names and values that are entered for the rule conditions are included in the Combined Conditions grid when you click the Build Rule Definition button and select an operator. The items in the Combined Conditions grid are a foundation that is used to build more complex conditions. Select two or more rows to build the complex condition. Every new complex condition that you create is added to the Combined Conditions grid. You can continue to use the new conditions to create more complex conditions for the rule definition.

And/Or

After selecting two or more combined conditions, select either operator to combine the conditions. This is available if you are using the Advanced mode.

Note. In basic mode, the system automatically uses only the “And” operator.

Build Rule Definition

After selecting the conditions to use and the conditional operator, click this button to build the rule definition. The new condition is added to the Combined Conditions grid and the definition appears in the Rule Definition section.

Rule Definition

Displays the final definition in both advanced and basic modes. When using the basic mode, the system displays the rule definition automatically. Click Save to save the price rule.

Establishing Price Rule Formulas

Access the Formulas page.

Valid options are based on the transaction and are established on the Application Code page.

See [Chapter 2, “Implementing PeopleSoft Enterprise Pricer,” Configuring Application Code Options, page 14](#).

The price action type that is selected determines the additional data that is required on the price formula. The start and end dates and the high and low quantities are required for each formula. The date and quantity of the transaction must fall within these ranges in order for system to apply the formula to the transaction.

Formulas page

Rule Attributes

Price Action Type

Use to define what the price rule does, if it's applied to a transaction. This is a required field.

Values vary for each transaction:

Discount/Surcharge: Apply a discount or surcharge to the line.

Giveaway: Apply a giveaway product, which can be based on the line or order.

Price List Only Condition: Apply a price list to the customer or customer group.

Min/Max Target Discount: Compare the discount adjustment and apply a target discount.

Min/Max Target Price: Compare the price adjustment and apply a target price.

Min/Max Target Surcharge: Compare the surcharge adjustment and apply a target surcharge.

Note. Use the target price action types to compare the adjustments and make sure that the adjustments are correct. For example, if you define a maximum target discount for a product to be 25 percent, the system applies discounts to the base price up to that 25 percent maximum. If you define a minimum surcharge for a product to be 5 percent, the system always applies a 5 percent surcharge. If you define a minimum target price for a product to be 50 USD, the system applies adjustments to the base price, but does not discount the price below 50 USD.

Note. Order Management does not support minimum or maximum target price action types in this release. The minimum selling price is defined on the product.

Price Override: Apply a new price to replace the existing price.

Note. If the price rule is defined only for product ID, it is recommended that you use the Price List feature to define the base price for the product.

Total Order Discount/Surcharge: Apply a discount or surcharge to the entire order.

Price Type

Use to define which transaction value the system should use to compare the range of the price rule formula.

Values vary for each transaction and include :

Extended Price.

Quantity.

Volume: Only applies to weight and volume pricing.

Weight: Only applies to weight and volume pricing.

Note. Weight and volume are not used by PeopleSoft CRM applications.

Cascading/Summed

This value determines how the system applies the adjustment for the *Discount/Surcharge* price action type.

Cascading: Applied as they are found. A second discount is applied to the previously discounted price, a third discount is applied to a price that is already discounted twice, and so on. For example, if the system encounters two discounts, such as 10 percent and 20 percent to be taken off the list price of 100 USD, the system applies the discounts in the following manner: 10 percent off of 100 USD and 20 percent off of 90 USD. Thus, the unit price for the order schedule line is 72 USD.

Summed: When the system finds multiple discounts, it adds them together and applies the discounts once. Thus, for the summed example, the system applies discounts in this manner: the 10 percent and 20

percent discounts are combined for 30 percent off of 100 USD. The unit price for the order schedule line is 70 USD.

Promotion Code

Displays customer promotions and national allowances from PeopleSoft Promotions Management. If a price rule is generated by the Pricing Load process in PeopleSoft Promotions Management, the promotion code is automatically assigned to the price rule.

Use Grace Days

Select if you want the system to use the grace days that are assigned to the customer when determining which price formulas are applied to the price. A grace period (in days) can be defined for each customer. Grace days are added to the ending date of the formula.

Note. This option is not used by PeopleSoft CRM applications.

Note. This option will not be selected if the price rule is generated by the Pricing Load process in PeopleSoft Promotions Management.

Merchandising Type

Displays the merchandising type associated with the customer promotion or national allowance defined in PeopleSoft Promotions Management.

Period-to-Date

Used to include period-to-date totals in the adjustment. The system will apply adjustments based on purchases within a determined period. Each order is considered in the adjustment based on the date of the order. Past orders are used to compare the price and quantity ranges of the formula on the price rule.

Note. This option is not used by PeopleSoft CRM applications.

Stop Processing Here

Prevents the system from applying further price adjustments when the system finds a match with a price rule. This occurs for total order or line adjustments. The system stops applying price adjustments after encountering the first price rule match that has this option selected.

Note. This option applies only for price adjustments. It does not apply for price lists that are associated with price rules.

Note. The stop processing option is handled separately for total order and line adjustments.

Price Formulas

The fields in this grid vary depending on the price action type and price type.

Unit of Measure

Applies to price rules for product and product group only.

Start Date and End Date

The transaction date must fall within these dates if this rule is to apply.

Note. If you use PeopleSoft Supply Chain Management (PeopleSoft SCM) installations, the grace days field on the General Information - Sold to Options page indicates the grace pricing discount days. An entry in this field enables customers to receive discount pricing beyond the end date for the price break.

Low Quantity

Specify the limits. The field is based on the price type definition. The system enters the next-lower quantity or amount limit as you insert price formula entries on this page. The quantity appears if you select the quantity price type and the amount appears if you enter the Extended Price price type.

High Quantity

An upper limit of 9999999999 enables the price formula to be applied regardless of the quantity that is entered on the transaction. For example, if you enter a price formula with a quantity range of 1–200 and don't create any other price formulas, the system does not apply a price formula to an order with a quantity of 201 unless an upper limit is entered. The system uses 9999999999 as the default in the High Quantity field for the last price formula if the field is left blank.

Percent or Amount Type

Make adjustments by percentage or a fixed amount. Values are: *Amount* or *Percent*.

Adjustment Amount

Enter the adjustment amount if you select *Amount* in the Percent or Amount Type field.

Adjustment Percent

Enter the adjustment percentage if you select *Percent* in the Percent or Amount Type field.

Price

Enter the new price, if the price action type is price override.

Currency

Use to specify amount values in the Amount Type field and for price overrides.

Note. The currency is also required if the price type is extended price.

Charge Type

Select from the available options for price action types: *Discount* /*Surcharge* and *Total Discount/Surcharge*.

Discount: Reduces the list price of the product or the entire order in the case of a total order discount.

Surcharge: Increases the price of the product or the entire order in the case of a total order surcharge.

Important! Discounts must always be negative numbers and surcharges must always be positive numbers. If you select *Discount* but enter a positive number, the system changes the number to a negative number.

Minimum Amount and Maximum Amount

Enter both of these values if you select *Amount* in the Percent or Amount Type field. This applies to the following price action types: minimum or maximum target discount and minimum or maximum target surcharge.

Minimum Percent and Maximum Percent

Enter both of these values if you select *Percent* in the Percent or Amount Type field. This applies to the following price action types: minimum or maximum target discount and minimum or maximum target surcharge.

Minimum Price and Maximum Price

Enter both of these values if you select *Min/Max Target Price* (minimum or maximum target price) in the Price Action Type field.

Giveaway Tab

Select the Giveaway tab.

This tab is only available if the pricing transaction is defined to use giveaways.

UOM Promo (unit of measure promotion)

Select the UOM for the product that is to be given away.

Giveaway Type

Specify whether you want the giveaway to be applied to each line of the transaction (sales order) or to be applied only once to the header of the transaction.

Per Line: The system applies this giveaway to every line.

Per Order: The system applies this giveaway only once to the entire sales order.

Terms and Adjustment Type Tab

Select the Terms and Adjustments Type tab.

Terms

Assign a payment term to the formula. If this formula is used when pricing the transaction, the system assigns the most favorable payment terms to the transaction.

Important! If you set up a price rule with payment terms as a key and you have a price formula with payment terms, the payment terms on the sales order may be replaced by the best payment terms from the price rule. You may not get the intended price adjustment if you reprice the order. If you don't want pricing to change, you can use the price protected option.

Note. This option is not used in PeopleSoft CRM.

Adjustment Type

Values are:

Bill Back: An adjustment that is accrued, instead of reducing the net unit price of the item on the invoice.

Note. This option does not appear in PeopleSoft CRM. PeopleSoft CRM uses off-invoice adjustments.

Note. If a price rule is generated by the Pricing Load process in PeopleSoft Promotions Management with a bill back adjustment type, the discount will not be passed to PeopleSoft Billing for accrual purposes. Instead, the bill back adjustments are processed by creating a claim for promotional payment in PeopleSoft Promotions Management.

Off-Invoice: An adjustment that reduces the net unit price or the price of the order in the case of a total order adjustment.

Account Distribution Codes

Discount and surcharge distribution codes are used to identify the appropriate discount and surcharge accounts to credit or debit when the OM Billing Interface process (OM_BILL) posts accounting entries. The discount and surcharge distribution codes found on this page default onto the order and are kept at the price adjustment level. They are not visible on the Order Entry pages in PeopleSoft Order Management. When the OM Billing Interface process sends entries for invoicing, it selects the discount and surcharge distribution codes from the price adjustments first. If there are none, then the distribution accounting revenue, discount and surcharge values found on the sales order are used.

Note. This option is not used by PeopleSoft CRM.

Discount Distribution Code and Surcharge Distribution Code

These distribution codes, along with the associated amounts, are passed to PeopleSoft Billing Interface tables during the Populate Billing process.

To use bill backs, enter both a discount and surcharge code. Off-invoice discounts or surcharges only require one of these codes.

Discount Dist Percentage
(discount distribution percentage) and **Surcharge Dist Percentage** (surcharge distribution percentage)

The sum of the percentages must equal 100 percent for each business unit and adjustment type.

CHAPTER 6

Using the Arbitration Plan

This section provides an overview of and discusses how to set up an arbitration plan.

Understanding an Arbitration Plan

The arbitration plan is the arbiter when multiple price rules match the transaction. It decides the order in which the price rules are applied to the transaction base price. For price rules that match on the same criteria, you can define the arbitration plan to break those ties and tell the system which rule to apply first.

The arbitration plan can also be used to filter the price rules that can be applied to the transaction. The definition of the arbitration plan nodes and the placement of the decision nodes determine the filtering power of the arbitration plan. To verify your arbitration plan is performing as you expect, it is recommended you use the pricing simulator to test your arbitration plan and price rules.

Placement of certain price action types in the arbitration tree will not affect the order in which the adjustment is applied to the transaction, but it may affect the 'Stop Processing Here' flag defined on the price rule. These price action types are:

- Summed - Adjustments are always summed and applied after all other adjustments have been made.
- Total Order Discounts/Surcharges - Adjustments are always summed and applied to the total order value after all other line level adjustments have been made.
- Giveaways - Are always applied after all other adjustments have been made.

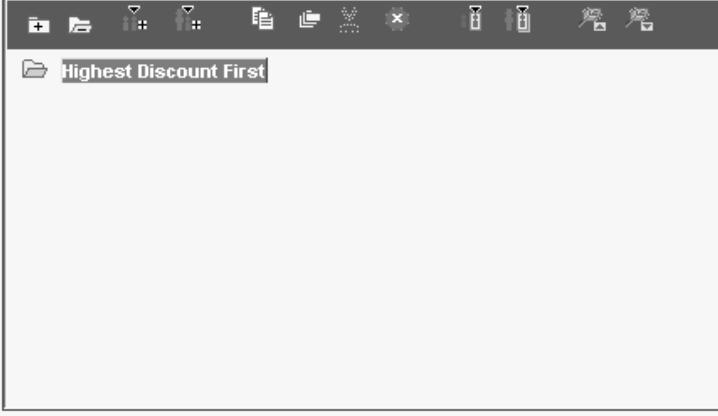
An example of a very basic arbitration plan tells the system how to sort all price rules with conditions that match the transaction.

Arbitration Plan

Arbitration Plan	Transaction	Description	SetID
NEXT	SO	Sales Order	SHARE

*Description: *Price Date: Default

Arbitration Tree



Selection Detail

Arbitration Type:

Decision:

Arbitration Plan using a Highest Discount First decision

If you are certain your price rules are defined only for discounts (no price overrides or giveaways), you can define your arbitration plan as simply as this. If you use any of the other price action types, the pricing results using this plan will be inconsistent. A decision point, i.e. highest discount first, defined at the highest level in the arbitration tree instructs the pricing engine to apply all matching price rules. You should refine your plan based on your use of the pricing features.

The following example instructs the system to select all price rules with conditions matching the transaction and to sort them first by surcharges and then by discounts. If there are multiple surcharges, apply the lowest surcharge first. After all the surcharges have been applied, apply the discounts (highest discount first).

Arbitration Plan

Arbitration Plan	Transaction	Description	SetID
NEXT	SO	Sales Order	SHARE

*Description: Arbitration Sort Adjustments *Price Date: Order Date Default

Arbitration Tree

Selection Detail

Arbitration Type: Decision
Decision: Highest Discount First
Update Tree

Arbitration Plan using surcharges and discounts

The arbitration plan can also be used as a filter to apply certain price rules to a transaction and not others. Although some price rules may match the transaction according to the conditions of the price rule, the arbitration plan can be defined in such a way that it bypasses some price rules. The example above is also a filter in that it only applies surcharges and discounts to the transaction. If there are giveaway or price override price rules defined that match the transaction, they are not applied when using this arbitration plan.

Continuing with the same example; to apply giveaway and price override price rules, you can define the arbitration plan as follows:

Arbitration Plan

Arbitration Plan	Transaction	Description	SetID
NEXT	SO	Sales Order	SHARE

*Description: Arbitration Sort Adjustments *Price Date: Order Date Default

Arbitration Tree

```

graph TD
    PriceOverride[Price Override] --> LowestPriceOverrideFirst[Lowest Price Override First]
    Surcharge[Surcharge] --> LowestSurchargeFirst[Lowest Surcharge First]
    Discount[Discount] --> HighestDiscountFirst[Highest Discount First]
    Giveaway[Giveaway]
  
```

Selection Detail

Arbitration Type:	Action Type
Price Action Type:	Giveaway
<input type="button" value="Update Tree"/>	

Arbitration Plan using Giveaways and Price Overrides

Any arbitration plan that does not have a decision point at the top level of the tree is a filter. Wherever you place the decision node in the tree is where you tell the pricing engine you don't care to further differentiate the price rules - just apply whatever rules match the transaction at that point in the order of the decision.

For example, you want to define an arbitration plan that selects only discount price rules that match certain fields on your transaction. In this case, you define the order in which those matching price rules are applied to the transaction. In this example, let's say you want to match price rules defined only by sold-to customer, product, and region code. Once the system finds the matching price rules, first apply those rules that match all three criteria, then apply the rules that match only the product, then any discounts defined for our favorite customers.

Arbitration Plan

Arbitration Plan	Transaction	Description	SetID
ARBFILTER1	SO	Sales Order	SHARE

*Description: *Price Date: Default

Arbitration Tree

The Arbitration Tree panel displays a hierarchical structure of price rules. The root node is 'Sold-to, Product, Region', which branches into 'Sold To Customer', 'Product ID', 'Region Code', and 'Discount'. The 'Discount' node further branches into 'Highest Discount First'. Other nodes include 'Product' (branching into 'Product ID', 'Discount', and 'Highest Discount First'), 'Sold-to' (branching into 'Sold To Customer', 'Discount', and 'Highest Discount First'), and a final 'Discount' node under 'Sold-to'.

The Selection Detail panel on the right shows the 'Arbitration Type' set to 'Pricing Key' and the 'Description' set to 'Sold-to, Product, Region'. It also displays a 'Pricing Keys' section with three dropdown menus: 'Sold To Customer', 'Product ID', and 'Region Code', each with a '+' and '-' button for adding or removing keys. A 'Update Tree' button is located at the bottom right of this panel.

Arbitration Plan using a filter

This arbitration plan considers only discount price rules that are defined by sold-to customer, product, and region; product; or sold-to customer only. It applies the formulas for those price rules in that order. If there is a tie within a node, i.e. there are two price rules defined for the product ID, the system sorts those two rules and applies the highest discount first.

In the event where two rules match the same node in the tree, the system finds the next node that can be used for each rule until a different node is used by each rule or a decision point is reached. When searching for the node, if the rule does not match a top-level node, it skips any child node and evaluates the next node, which is at the same level or a level higher as the node that is evaluated last. If the rule does not match any node in the tree and there is no final decision point defined at the top level of the tree, the rule is ignored. Every node that is used to break a tie ends in a decision.

Note. The tree node is similar to a sequence used in prior releases. The node is represented as a sequence in the tree.

You can create price rules without an arbitration plan, but the system does not apply the price rules unless you create an arbitration plan.

Note. In PeopleSoft Supply Chain Management, the system assigns the arbitration plan to the sold to customer and customer group. The arbitration plan appears by default on the sales order in the following order: sold to customer, customer group, and default that is defined for the transaction.

Note. The options that are available in the arbitration plan are established by each transaction.

See Also

[Chapter 2, “Implementing PeopleSoft Enterprise Pricer,” page 3](#)

Setting up an Arbitration Plan

To define arbitration plans, use the Arbitration Plan component. This section discusses how to set up an arbitration plan.

Pages Used to Set Up Arbitration Plans

Page Name	Object Name	Navigation	Usage
Arbitration Plan	EOEP_ARB_PLAN	Pricing Configuration, Create Pricing Information, Arbitration Plan	Define how price rules apply to the base or list price when pricing a transaction.

Setting Up an Arbitration Plan

Access the Arbitration Plan page.

Arbitration Plan page

Transaction

Arbitration plans are defined by pricing transaction. The system uses this field to verify and limit the price by keys. In Add mode, select a transaction code. The transaction also determines other valid options, such as the price rules that can be specified on the plan.

Note. In PeopleSoft Customer Relationship Management (PeopleSoft CRM) installations, the OC transaction (order capture transaction) appears by default and you are not able to select another value.

Price Date

Select the transaction date that you want the system to compare to the start and end dates that are defined on the Price Formulas page. This is the date that is used for the start date of individual products that are on the price list.

This field is available if price dates are selected during implementation on the Price Transaction Code page.

Values are:

Order Date: The date that the order header is created. The system uses the current date as the default date on a sales order header, but you can enter another date.

Note. PeopleSoft CRM uses the order date as the default transaction date. The field is not enterable for the OC transaction.

Requested Arrival Date: The date that the customers want the order to arrive at their site.

Schedule Ship Date: The date that the order line is scheduled to ship. The system calculates this date from the requested arrival date, using the transit lead time and exception ship dates, but you can enter another date.

Note. The requested arrival date and schedule ship date are used by transaction in PeopleSoft Supply Chain Management (PeopleSoft SCM) only.

Default

Select to establish the default arbitration plan for the transaction. The system uses the default arbitration plan when a customer doesn't have another associated arbitration plan or doesn't belong to a customer group that has an associated arbitration plan. You must have one and only one default arbitration plan for each transaction.

Arbitration Tree

Use the buttons that are on the toolbar to edit and navigate the arbitration tree.

Note. You can copy, cut, and paste between different arbitration plans or from an existing arbitration plan to a new one by using the buttons on the toolbar.

Add Sibling

Click this button to add a new node to the same level as the selected node. This option is represented by a sequence in the tree.

Add Child

Click this button to add a new node underneath the selected node or sequence.

Copy

Click this button to copy the selected node to the clipboard, so that it can be pasted somewhere else.

Copy Branch

Click this button to copy the selected node and any nodes that are underneath it.

Cut	Click this button to remove the selected branch from the tree. The nodes are copied to the clipboard so that they can be pasted somewhere else.
Delete	Click this button to remove the branch from the tree. The nodes are not copied to the clipboard.
Paste as Sibling	Click this button to paste the nodes from the clipboard. The nodes are inserted at the same level as the selected node.
Paste as Child	Click this button to paste the nodes from the clipboard. The nodes are inserted as a child of the selected node.
Move Up	Click this button to move the selected node up one level.
Move Down	Click this button to move the selected node down one level.

Selection Detail

Arbitration Type Select from the following options to add nodes to the arbitration tree to instruct the system how to apply the price rules. This list of values is determined during implementation on the Price Transaction Code page.

The arbitration plan can be used to sort matching price rules, and it can be used to filter out other price rule definitions depending on the arbitration types that you choose at the top level of the tree. Values are:

Action Type: Select corresponding values from the Price Action Type field:

- *Discount*.
- *Giveaway*.

Note. Giveaway price rules are ignored if *Giveaway* is not defined in the arbitration plan.

- *Price Override*.

Note. The price override will be applied at whatever point you define it in the arbitration plan.

- *Surcharge*.
- *Total Order Discount*.
- *Total Order Surcharge*.

Note. Total order adjustments are always applied to the total net order value after all other adjustments are applied. Defining the Total Order action types in the arbitration plan adds to the filtering function of the arbitration plan, and it helps to define the sort order of the price rules when performing stop-search processing.

Cascading/Summed: Select either value from the Cascaded/Summed field.

Note. Summed price rule adjustments are always totaled and applied to the net price after cascading adjustments are applied. Using Cascading/Summed in the arbitration tree helps to define the sort order of the price rules when processing stop-search price rules. It does not affect the way in which the summed price rule formulas are applied to the transaction.

Decision: Select from the following values that are used to break a tie in the case of the system encountering two nodes that match the rule.

- *Rule Name in Ascending Order.*
- *Highest Discount First.*
- *Highest Surcharge First.*
- *Rule Name in Descending Order.*
- *Lowest Discount First.*
- *Lowest Surcharge First.*
- *Highest Price Override First and Lowest Price Override First.*

Note. If you define a decision at the top level of the arbitration tree, the system selects all price rules with matching conditions. You effectively turn off any filtering power of the arbitration tree.

Note. If you do not define a decision for each child node that is in the tree, the results may be inconsistent. The matching rules within that node are applied in an undetermined order.

Date Range: Use to limit the effectiveness of the adjustment. Enter a start date and end date. Also select whether the date is active or inactive in the Effective Status field.

Price Rule: Enter a description and select a price rule. This value replaces the Exclusive Pricing feature in previous releases. Exclusive pricing IDs are arbitration plans with the price rule defined in the tree.

Note. This option is only used by PeopleSoft Order Management.

Price Type: Select corresponding values from the Price Action Typefield. Values include:

- *Extended Price*
- *Quantity*
- *Volume*
- *Weight*

Note. The Order Capture transaction uses extended price and quantity only.

Note. In SCM, *weight* and *volume* are available only for the Weight & Volume transaction.

Pricing Keys: Enter a description and select a pricing key. The list of values is based on the pricing keys that are established for the transaction type. You can define a node that is similar to the price rule sequence that is used in previous releases.

Note. The pricing key fields that are defined here must match the price rule condition price-by field names exactly in order to apply to the transaction. Partial price key matches are not considered.

Folder: Select a folder in the node and enter a description to rename a folder in the node. You can group nodes of a tree and give them a name. It is used for information purposes only.

Update Tree

Click this button to re-display the selections to the arbitration tree. Clicking the button does not save the changes to the arbitration plan.

CHAPTER 7

Working With the Pricing Simulator

This chapter provides an overview of and discusses how to run the pricing simulator.

Understanding the Pricing Simulator

The pricing simulator enables you to test the pricing information that you set up. Use it to view the outcome of pricing under different scenarios, or use it to test specific pricing criteria with a particular customer. You can adjust the price rules, price lists, and arbitration plan until you receive the desired pricing adjustments. For those transactions that use the header and line structure such as the sales order, you can enter criteria and view the adjustment at the header and line level.

If the installation includes PeopleSoft Order Management, you can also test pricing on the Pricing and Availability page.

Pricing Simulator Scenario

A price rule exists where Customer 1005 will receive a discount amount of 10.00 euro for purchasing between 1-10 units of product 10050. This is valid for the period through the end of the year.

To test the scenario in the simulator, complete the following steps:

1. Add Sales Orders as the Transaction on the Rule Attributes section of the Conditions page. Enter a Description and change the Mode to Basic.
2. Add Sold to Customer 1005 and Product ID 10050 to the Rule Conditions section of the Conditions page.
3. On the Rule Attributes section of the Formula page, select Discount/Surcharge as the Price Action Type, Quantity as the Price Type, and Cascading in the Cascading/Summed field.
4. On the Formula Definition section of the Formula page, enter the line as follows (use EA as the UOM, euro as the currency, and Discount as the Charge Type):

Start Date	End Date	Low Qty	High Qty	%/Amt Type	Amount/%
Today's date	12/31/2003	1	10	Amount	10

5. Create a simple arbitration plan on the Arbitration page with Pricing Key as the Arbitration Type. Select both Sold To Customer and Product ID in the Pricing Keys section.
6. On the Pricing Keys section of the Simulator page, enter the 1005 Sold to Customer and 10050 Product ID.
7. In the Line Information group box, enter the line:

Product ID	UOM	Quantity
10050	EA	5

- Click the Calculate button. The results bring back the net unit price for the product (List price 39.99 euro – 10.00 discount amount = 29.99 euro). The transaction total is also shown to indicate how the scenario would be priced on your transaction when the price rules are deployed. In the Statistics group box, you will see how many price rules were applied. To verify if the correct price rule is applied, click the Details button in the Line Info tab.

See Also

PeopleSoft Order Management 8.8 PeopleBook, “Introduction to Sales Order Entry,”
Checking Price and Availability

Running the Pricing Simulator

This section lists common elements and discusses how to run the pricing simulator.

Comment Elements Used in this Section

Key field code	Represents the transaction field that is used to match to the price rules. The available values are based on the pricing keys established for the transaction. For example, if your price rule condition was for a specific customer or customer group, you need to select the options in order for the price rules to be considered.
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Note. You can update the pricing keys in the simulator in two places. Update the header level pricing keys on the main page of the Simulator page. The line-level pricing keys can be updated on the Pricing Keys page.

Value	Represents the transaction value of the key field code. The available values are based on the selection in the Key field code field.
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Note. Line-level information that is entered here, such as carrier ID, ship to customer, and commodity code, is applied to all of the lines in the simulation unless other values are entered explicitly for each line.

Pages Used to Run the Pricing Simulator

Page Name	Object Name	Navigation	Usage
Simulator	EOEP_TEST	Pricing Configuration, Create Pricing Information, Simulator Promotions, Manage Promotions, Simulate Pricing Click the Simulate Pricing link on the Promotions, Manage Promotions, Create Customer-Specific Promotion, Product Details or Product Prices page.	Use to test the pricing information that is set up with PeopleSoft Enterprise Pricer and to select values for the transaction price-by keys that are used in the pricing simulation.
Pricing Keys	EOEP_TEST_LN_KEY	Click the Pricing Keys button on the Simulator page.	Use to select and view the line-level pricing keys that are used in the pricing simulation.
Header Adjustments	EOEP_TEST_HD_ADJUST	Click the Adjustments button on the Simulator page.	View the details of the adjustments that apply to the header. The fields on this page are the same as those that you use on the Price Rule and Price Arbitration page. Note. The link for this page is only available if adjustments apply to the header.
Line Adjustments	EOEP_TEST_LN_ADJUST	Click the Adjustments button on the Simulator page.	View the details of the adjustments that apply to the line. You can view the adjusted unit price and the price rule, formula, and keys that are used for the adjustment. The fields on this page are the same as those that you use on the Price Rule and Price Arbitration page. Note. The link for this page is only available if adjustments apply to the line.

Running the Pricing Simulator

Access the Simulator page.

If you don't receive the desired results using the simulator, check the following:

- Make sure the price rule assigned to the arbitration plan has a status of "Deployed" or "Ready to Test."

- Use the text in the Rule Definition group box on the Conditions page to make sure that it accurately reflects how the conditions for the rule are applied.
- Make sure the quantity or amount reflect what was specified on the Formulas page of the price rule.

Simulator

Transaction	Description	Price Test ID
SO	Sales Order	TOTAL ORDER
Description: total order test		

Header Information

Currency Code:	USD	Pricing Keys	Find View All	First	1 of 1	Last
Base Currency:	USD	Key field code	Value			
Transaction Date:	11/09/2003	Sold To Customer	1004			
Arbitration Plan:	SOLDTO					

Line Information

Line Info		Customize Find View All First 1 of 1 Last					
Line Info	Details	Product ID	UOM	Qty	List Price	Net Unit Price	Protected
1	10000	EA	10.0000	20.0000	20.0000	<input type="checkbox"/>	<input type="button" value="Delete"/>

Transaction Total	Statistics
Total Net Price: 200.00	Number of Rules Used: 1 of 29
Transaction Adjustment: -20.00	Number of Adjustments Applied: 1
Transaction Total: 180.00	Number of Giveaways Found: 0

Simulator page

Note. When you use this page, enter the arbitration plan, pricing key values, and product information. You must enter all applicable values for the transaction that you are trying to simulate, otherwise the system does not create the adjustments.

Description Enter descriptive text for each of the simulations that you are testing. For example, you might create one for giveaways, price overrides, and so on. You can save a simulation for later use and modify it as you make changes to the price lists, rules, and arbitration plan.

Header Information

Select information to simulate the transaction header and lines.

Currency Code Enter the currency code of the simulated transaction.

Base Currency Enter the base currency of the business unit for the simulated transaction.

Order Date Used to determine applicable price formulas. The current date appears by default.

Arbitration Plan

The list of available options is based on the transaction that you select. If you don't select an arbitration plan, the default appears.

Line Information

Select the Line Info tab.

Select product, unit of measure, and quantity to simulate the transaction line detail.

List Price

Displays the list or base price for the product.

Net Unit Price

Displays the price after the adjustments are applied.

Recurring Price and Frequency

Retrieves from the list price that is applied to the line. These fields appear only if you use PeopleSoft Order Capture.

Protected

Click the Pricing Keys button to edit or view the pricing keys for additional line level transaction information (in addition to the pricing keys on the Simulator page). You can use the page if you want to price the line by different values than the header or entire order. The available values are based on the pricing keys that are established for the transaction.



Click the Adjustments button to view the line-level price adjustments for the simulation. The button is visible only if there are header or line adjustments that match the criteria of the price simulation.

Details Tab**Price List Origin**

Use to view price list and payment terms information.

Displays the origin of the list price.

Price List: The price is retrieved from a price list. The price list ID appears next to Price List Origin field.

Price List (base): The price is retrieved in the base currency from a price list. The price list ID appears next to Price List Origin field.

Note. This value is used in PeopleSoft Customer Relationship Management only.

Product Price: The price is retrieved from the Product Price definition.

Product Price (base): The list price is retrieved in the base currency from the Product Price definition.

Price List ID

Displays the ID for the price list from which the list price is retrieved.

Payment Terms

Displays the terms that are retrieved from the price rule that matches the simulation.

Note. This option is used in PeopleSoft Supply Chain Management installations only.

Transaction Total

Displays the total net price for the simulated transaction including adjustments that apply to the entire order (total order discounts and total order surcharges).

Statistics

Displays statistical results of the simulation.

Calculate

Calculate Click to calculate or recalculate the price simulation and view the price adjustments.

CHAPTER 8

Updating Price Lists

This section provides an overview and describes how to :

- Update price lists.
- Set up and maintain Price Maintenance.

Updating Price Lists

Alter product list prices on price lists individually on the Price Lists page or apply global changes using the Price List Maintenance process. In addition to using the process for updating price lists, you can use it to convert an existing price list into another currency.

Note. Keep in mind that you can alter prices on the Price List page between the export and import of pricing data. Those changes will be overridden when new pricing information is imported from Microsoft Excel.

Note. Only products that use standard costing or are non-inventoried products such as services can be updated using Price List maintenance.

Perform the following to update price lists using price list maintenance.

Note. Product price maintenance requires that you use portal navigation and the PeopleSoft windows client.

1. From the portal navigation, use the Price List Maintenance page to select the price lists to update.
2. From the PeopleSoft windows client, select nVision. The Personal PS/nVision Home Page Report displays on the screen.
 - a. Click Open Layout from the Personal PS/nVision Home Page Report and select the OMPLST.XNV file for price lists. A Microsoft Excel page displays that includes the Price Maintenance toolbar.
 - b. Select the Download button on the Price Maintenance toolbar to display the price list information in Microsoft Excel.
 - c. After making changes, select the Upload button on the Price Maintenance toolbar to mark the rows that were changed.
3. From the portal navigation, run the Import Price List process to complete the upload.

The following section discusses how to:

- Use price list maintenance.

- Update price lists in Microsoft Excel.
- Use mass maintenance.
- Use currency maintenance.
- Reset data.
- Print price list changes.
- Display price list changes in a chart format.
- Upload price list data.

Pages Used to Update Price Lists

Page Name	Object Name	Navigation	Usage
Price List Maintenance	OM_PLST_NVS_PNL	Pricing Configuration, Mass Updates, Maintain Price List, Price List Maintenance	Download price list data to Microsoft Excel for mass adjustments or currency conversion.
Import Price Lists	RUN_OMS8010	Pricing Configuration, Mass Updates, Import Price Lists	Complete the upload process for spreadsheet data.

Performing Price List Maintenance

Access the Price List Maintenance page.

Select Currency Code Select to restrict the download to a specific currency. A single price list ID may encompass price lists in more than one currency.

Currency Code To Use to convert an existing price list into another currency. When you choose this option, you must restrict the download to a single currency code.

Cost Business Unit Use to choose the warehouse the system will use for retrieving cost data because product costs for inventory items are stored per warehouse (Inventory business unit).

Price List As Of Date The system downloads the price list with the start date that is less than or equal to the date you enter in the field and all detail rows included on the price list. Each product on a price list may have more than one price—each with a unique start date and end date. Additionally, all future price list entries are downloaded also.

In the following example, assume that the Price List As of Date is set to 01/01/2005. The current price list entry, which has a start date of 12/01/2004 and an end date of 12/01/2005 would be downloaded. Any price list entries that fall before this current entry would not be downloaded. Any price list entries that have a start date beyond this range would also be downloaded as shown in the grid below.

Price List ID	Currency Code	Product ID	UOM	Start Date	End Date	Price
PL01	USD	10001	EA	12/01/04	12/01/05	100
PL01	USD	10001	EA	12/02/05	01/01/06	120

Product Cost Effective Date Use to determine which cost value to return.

Note. After saving the page, access nVision from the PeopleSoft windows client.

See Also

[Chapter 4, “Creating Price Lists,” page 31](#)

Updating Price Lists in Microsoft Excel

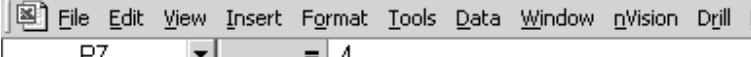
After logging on to nVision from the PeopleSoft windows client, a spreadsheet that includes the Price Maintenance toolbar displays.

Click the Download button to display the information in the spreadsheet.

The Calculator button is the only other button that acts directly on the data in the spreadsheet—the other buttons open dialog boxes where you will make additional selections.

Downloaded information displays in Microsoft Excel in three sections on the spreadsheet delineated by different column colors:

- Key fields that identify the price list and product display in gray columns.
- Editable fields—New Price, Diff. abs., New Start Date, New End Date, and New Protected Flag—display in light green columns. All other cells on the spreadsheet are locked.
- Current price and cost information display in beige columns.

Order Management - Price List Maintenance - OMPLST.xls															
															
															
SetID: SHARE				New Cost Effective Date: 10/8/2003											
Price List ID: MIKE				Cost retrieved from BU: US010											
				Currency of Price List to be added: same; Price List will be updated											
Cu	Prod.	Desc	L	Item	New	New P	Diff. %	New Sta	New End	Activ	Price				
USD	EX2018	Consulting	EA	EX2018	4.0000	11.0000	175.00	10/08/2003	10/15/2003	N	4.0000	11.0000			
USD	EX2018	Consulting	EA	EX2018	4.0000	12.0000	200.00	10/16/2003	01/01/2099	N	4.0000	12.0000			

Price List Maintenance spreadsheet

Note. The header information varies if you are updating price lists within the same currency or using price list maintenance to convert a price list to a new currency.



Use the Download button to display product information in the spreadsheet.



Use the Calculator button to toggle between the two displays using the Price Maintenance toolbar. Differences are not uploaded, but the display does impact the mass maintenance changes available when your changes are based on the differences values.

Key Field Columns

Prod. IDs (product IDs) May have multiple listings in a single price list if there are multiple prices with unique start date and end dates. May also have unique UOM's or currencies.

Editable Columns

The data in these columns will be uploaded to update PeopleSoft tables. You can edit each cell individually or apply mass maintenance changes.

New Cost The spreadsheet displays only information for inventory products that are standard costed and for non-inventory products. This column will not contain a value for other products. The column is not editable.

Note. Stocked products that are not costed in PeopleSoft Inventory are not downloaded.

New Price Matches the Price value for the date range represented by that row until you make changes.

New Start Dt. (new start date) Matches the start date on the price list. The minimum value for the New Start Dt. is the current date plus one day.

New End Dt. (new end date) Matches the end date on the price list. The minimum value for the new end date is the current date plus one day.

New Prot. (new price protected) When you establish prices on price lists, selecting the Price Protected option prevents the system from applying adjustments to the price. In addition, the Price Protected option on the sales order will be selected. You can alter this option in the column.

Current Price and Cost Information Columns

The information in these columns are available for comparison, but you cannot change the values in these columns. The toggle between the two differences affects both the New Diff. column and the Diff % column.

Filtering Data

The spreadsheet provides auto filtering for all columns. This enables you to choose criteria in one or more columns that limits the product rows displayed to a subset of those downloaded. After choosing a subset of the data, apply changes just to that subset. This enables you to apply different adjustments to separate subsets of the downloaded data.

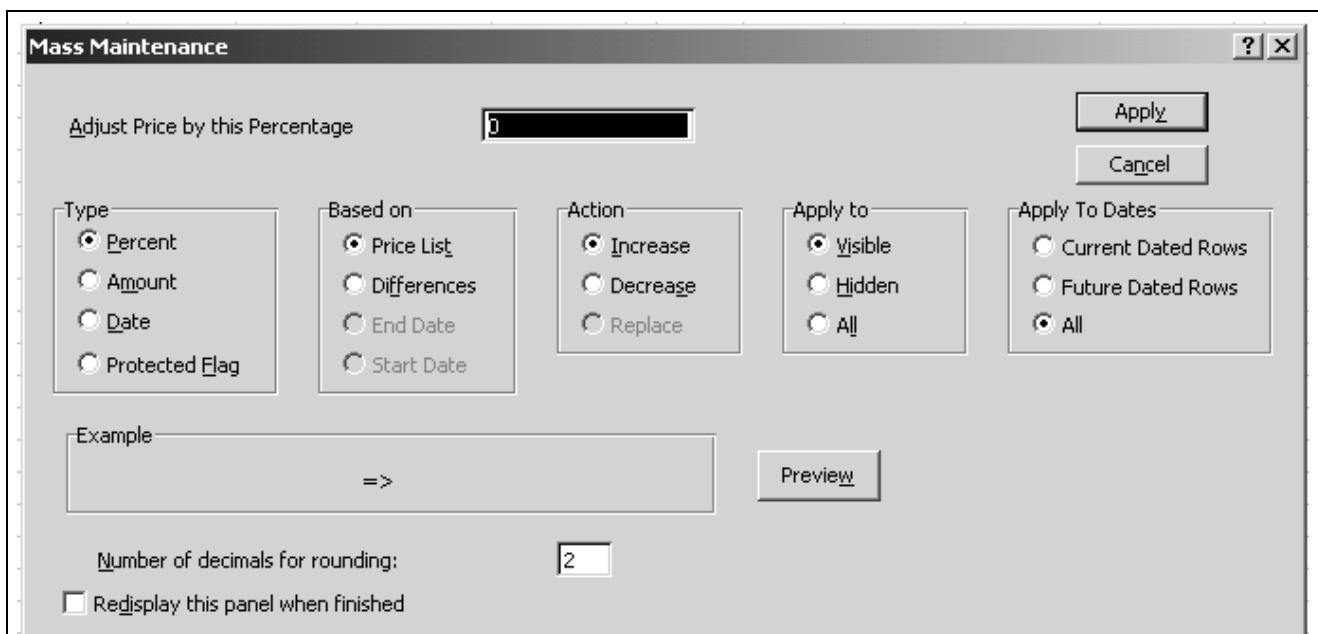
Choose filtering parameters by clicking the arrow in the heading row for a column and selecting a value from the available options. When filtering criteria are in effect, the color of the arrow changes from black to blue.

In addition to all the values in the column, there are five additional options to change for each column.

- *(All)*: After applying filters, this value resets the column to display all the data from the download.
- *Top 10*: This is a standard Microsoft Excel filtering option that is not used in price maintenance.
- *Custom*: Choose to set a particular range for column values.
- *Blanks*: Displays only those rows without a value.
- *Non-Blanks*: Displays only those rows with a value.

Using Price Lists Mass Maintenance

Use mass maintenance to apply changes to multiple products in the editable columns.



Mass Maintenance — Price List dialog box



Click the Mass Maintenance button to display the Mass Maintenance dialog box.

Type

Your selection options and the label of the first field change depending on the type of change you are making. Options are unavailable when the selection criteria does not apply. You can make a Percent change, an Amount change, a Date change, and a Protected Flag change.

Based On

The change can be based on the: Price List (New Price column), Differences between the cost and list price (New Diff. column), End Date (New End Date column), or Start Date (New Start Date column).

Note. The display mode for differences on the spreadsheet affects the selection criteria for changes Based on differences. If differences are displayed as percentages, the Type must be Percent. If differences are displayed as absolute amounts, the Type must be Amount.

Preview

Click the button to see an example of the current change before you apply it to your data. Keep in mind that prices are not limited to positive values.

Number of decimals for rounding

When a pricing change is applied, it's possible to alter the number of decimals the system uses in rounding to the new price by changing the value in the field. Valid values are 0 to 4. You can round to a different number of decimals without changing any other data. Just keep the default of 0 in the first field in the dialog box and alter the Number of decimals for rounding.

Note. The default value that displays in the Number of decimals for rounding field is determined by the settings on your computer. To change the default, select Control Page, Regional Settings, Currency.

Redisplay this page when finished

Select the option to apply several changes to the spreadsheet.

Using Currency Maintenance

If you chose a Currency Code To on the Price List Maintenance page, the results of the Microsoft Excel maintenance session will be used to add a new currency within the selected price list ID. If a price list in the Currency Code To field already exists, it will be updated with the new data.

The fields on the Mass Maintenance dialog box are slightly different in this case.

Exchange Rate

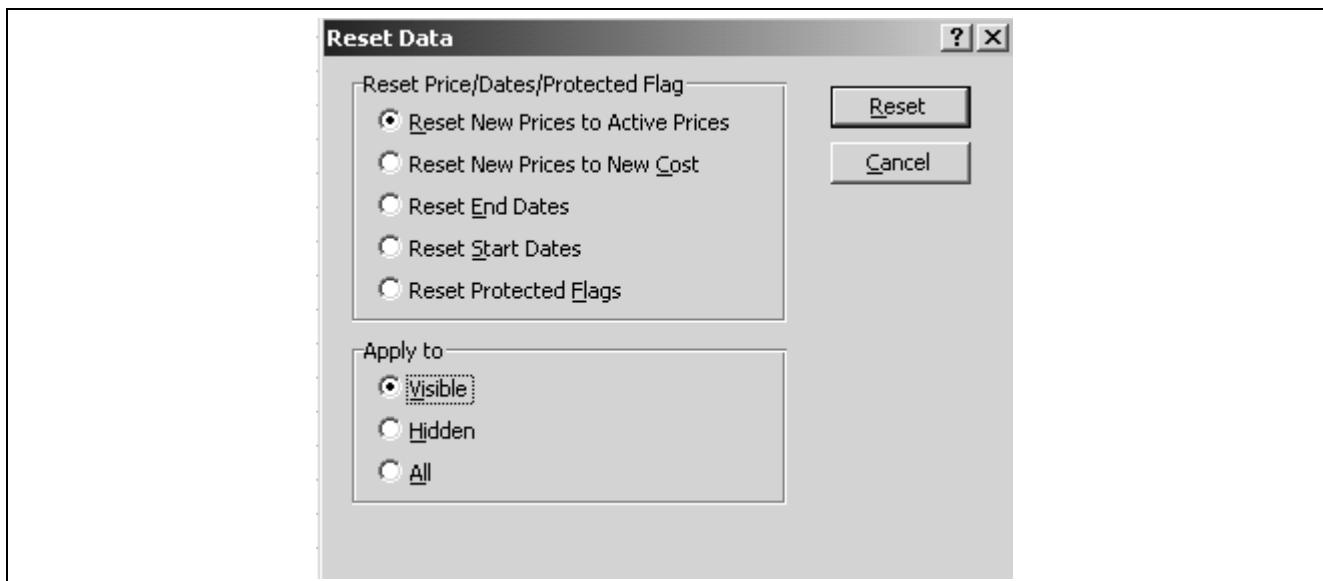
Now the first selection in the Type group box. Enter the appropriate exchange rate in the Apply this Exchange Rate to Prices field. This value can change daily. Obtain the current exchange rate from the appropriate person in your organization.

You cannot base your changes on Differences in this mode because the cost information is displayed in the original currency code, and the recalculated pricing reflect Currency To values.

Note. You must apply the same exchange rate to all the prices on your spreadsheet.

Resetting Price Lists Data

Use to reset the data to the original data from the download.



Reset Price Lists Data dialog box



Use the Reset Data button on the Price Maintenance toolbar to reset the columns to the original settings from the download. You can apply resets selectively using the filtering function.

Reset New Prices to Active Prices

Resets values in the New Price column to those displayed at download. These are the same values as those in the Active Price column.

Reset New Prices to New Cost

Resets values in the New price column to match the values in the New Cost column.

Reset End Dates

Resets values in the New End Dt. column to those displayed at download.

Reset Start Dates

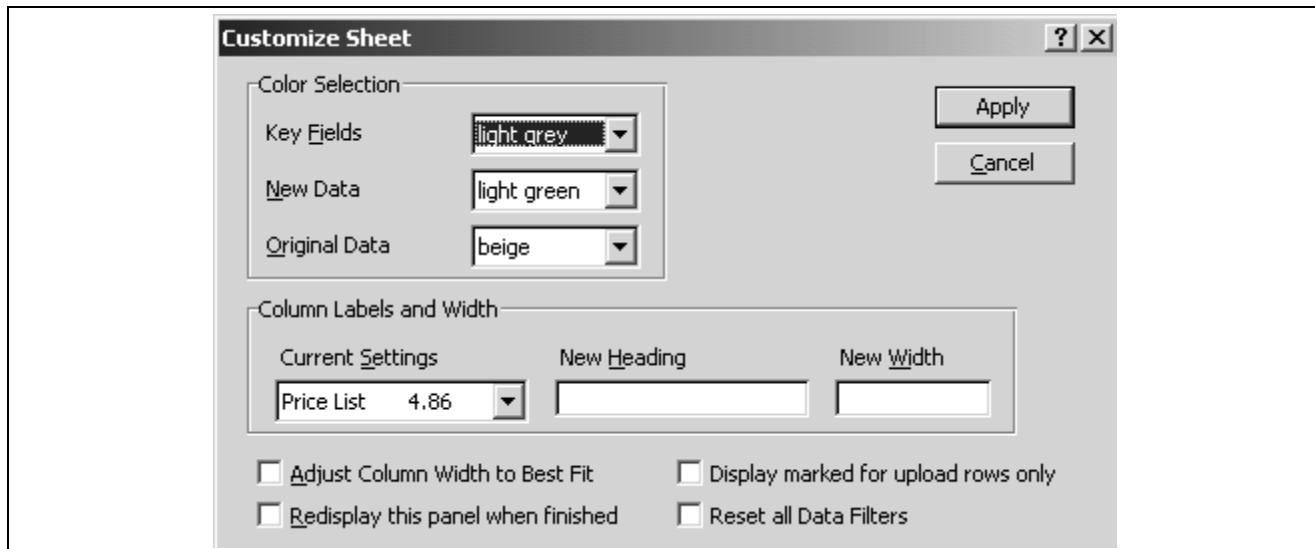
Resets values in the New Start Dt. column to those displayed at download.

Reset Protected Flag

Resets values in the New Prot. column to those displayed at download.

Customizing Display Options

Display the Customize Sheet dialog box.



Customize Sheet dialog box



Click the Customize Sheet toolbar button and check the:

Reset all Data Filters option to reset the spreadsheet to display all the data you downloaded.

Display primary pricing rows only option to display only the bold rows on the spreadsheet.

Customize Sheet option to display the Customize Sheet dialog box. You cannot format cells on the spreadsheet using the normal formatting options in Microsoft Excel because of security features.

Display marked for upload option to display only those rows that will be uploaded.

Current Settings

Select each column from the drop-down list box and enter a New Heading and/or a New Width if you prefer different headings or column widths.

Adjust Column Width to Best Fit

Select the option to set column widths to display the values entered and override any manually entered column widths.

Display marked for upload rows only

Select the option to display only those rows that have been changed. To display all rows, clear this option.

Redisplay this panel when finished

Select the option if making changes to the heading or width of a number of columns.

Reset all Data Filters

Select the option to display all the downloaded data by selecting the option if you have restricted the display of spreadsheet rows using the filtering option on one or more columns.

Apply

Click the button to apply changes to each column one at a time.

Printing Price Lists Data Changes

Use to print the spreadsheet. The system includes auto-filter settings and prints only the rows that have been changed.

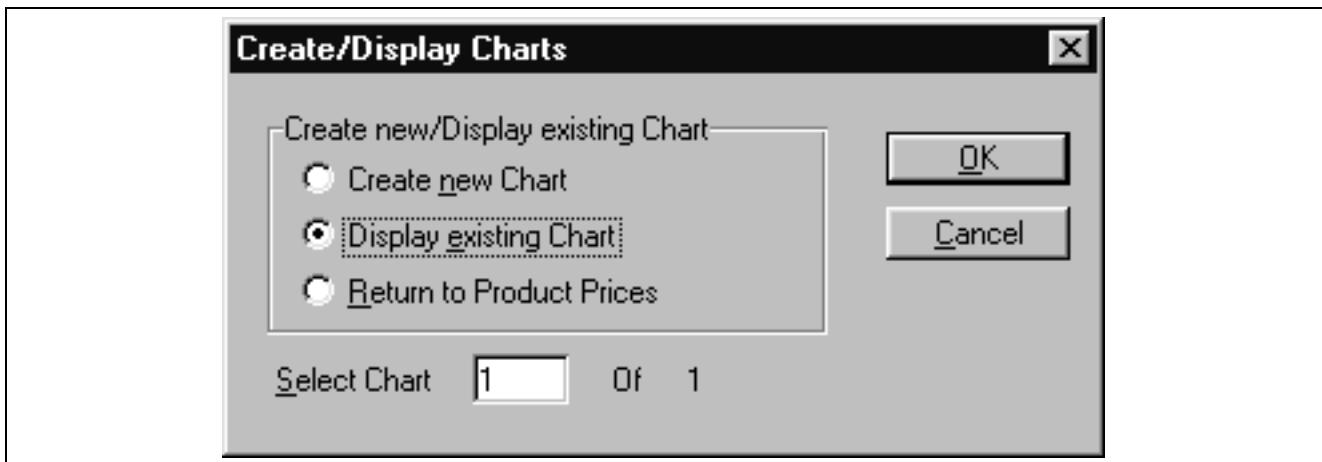


Use the Print button to print the spreadsheet data.

Displaying Price Lists Data in Chart Format

Use to create graphical charts of the list prices.

To change the display properties of the chart, use the standard Microsoft Excel menu Format options.



Create/Display Charts dialog box



Use the Chart button to create charts based on prices, differences, or both.

Create new Chart

Select to define the type of chart you want to create.

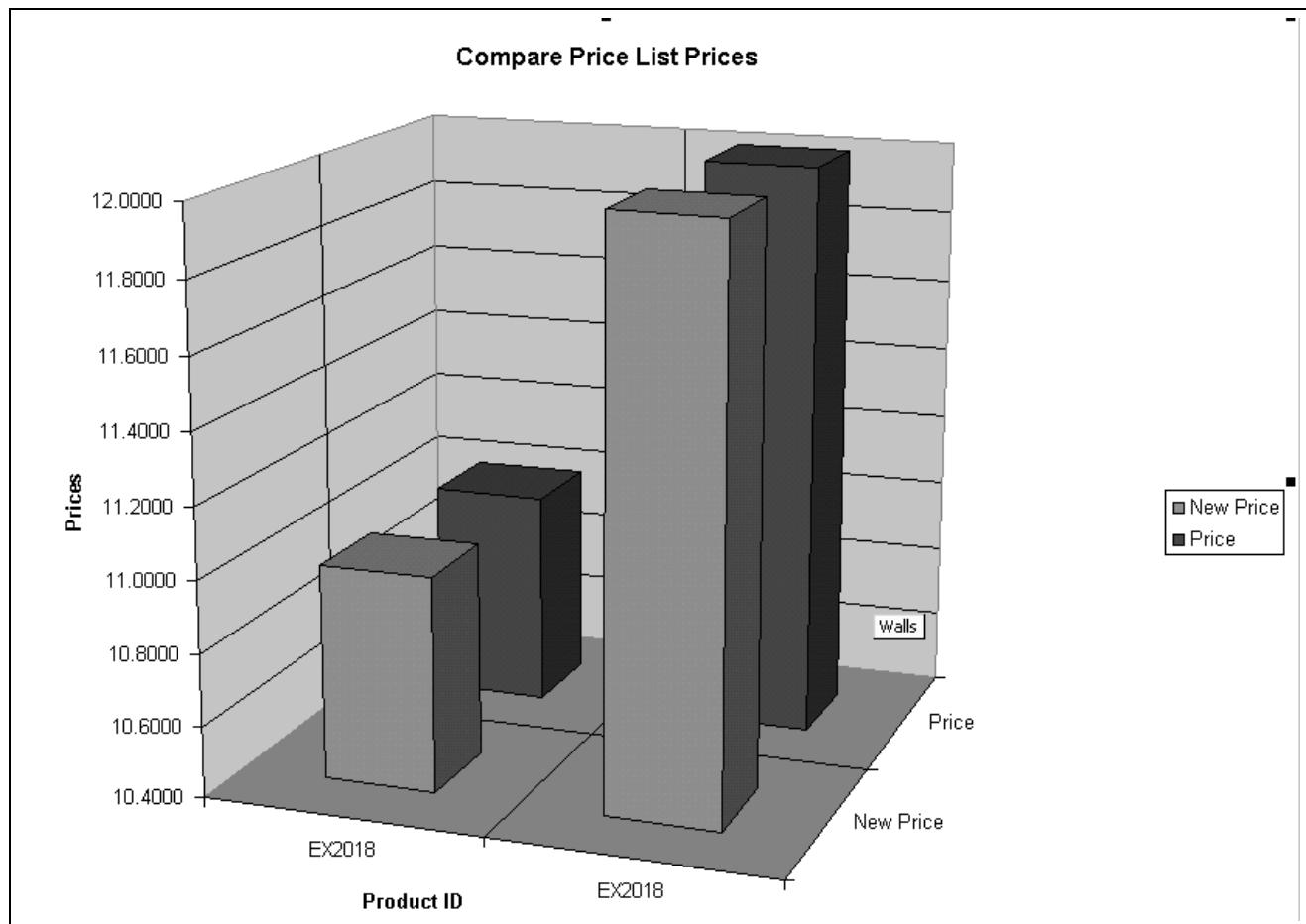
In the Define Chart Properties dialog box, select the following:

Keep previous chart

If you do not select this option, the previous chart will be replaced.

OK

The chart you have selected displays.



Example of a chart for Price Lists

Return to Product Prices

Select after selecting the Chart button on the price maintenance toolbar to return to the spreadsheet.

Uploading Price List Data from Microsoft Excel

The system uploads only rows with a change in the New Price, New Start Dt. (new start date), New End. Dt. (new end date), or New Prot. (new protected) columns.

When you are changing the new end date, new price, or new protected columns, the row will be updated for the price list. When you change the New Start Date, a new row will be inserted. You cannot have overlapping rows. If you make a change that creates an overlapping row, the system will display an error message and you will not be able to upload the change. The system will display a message that describes which row needs to be corrected. The cursor will also be positioned at the cell that needs to be changed in order to correct the overlapping data.

The following scenarios describe the effect of changing start and end dates.

Scenario A

Row	New Start Date	New End Date	Original Start Date	Original End Date
1	01/01/2003	10/31/2003	01/01/2003	10/31/2003
2	11/01/2003	12/31/2003	11/01/2003	12/31/2003

If we attempt to change the New Start Date in row 2 to 12/01/2003, the original data will still exist. The new data will become a new row since we changed the Start Date. The New Start Date of 12/01/2003 will overlap with the Original data in row 2.

The system will display the following error once the upload is attempted. “At least one new date range where start date was changed overlaps with the original date range of that same row. First incident on row 2. Processing stopped.”

Once the error is corrected by changing the New Start Date to 01/01/2004 and the New End Date end date to 01/01/2099, the upload will create the following rows in the database:

1. Original range of row 1 (01/01/2003 — 10/31/2003)
2. New range of row 2 (01/01/2004 — 01/01/2099)
3. Original range of row 2 (11/01/2003 — 12/31/2003)

Scenario B

Row	New Start Date	New End Date	Original Start Date	Original End Date
1	01/01/2003	10/31/2003	01/01/2003	10/31/2003
2	12/01/2003	01/01/2099	12/01/2003	01/01/2099

If we attempt to change the New Start Date in row 1 to 01/01/2004 and the New End Date to 12/31/2004, the original data will still exist. The new data will become a new row since we changed the Start Date. The New Start Date of 01/01/2004 will overlap with the Original data in row 2.

The system will display the following error once the upload is attempted. “Row 1 has a new date range that overlaps with the original date range of row 2 and they both are for the same list, currency, product, and UOM. Processing stopped.”

Once the error is corrected by changing the New Start Date to 11/01/2003 and New End Date to 11/30/2003 in row 1, the upload will create the following rows in the database:

1. New range of row 1 (11/01/2003 — 11/30/2003)
2. Original range of row 1 (01/01/2003 — 10/31/2003)
3. Original range of row 2 (12/01/2003 — 01/01/2099)

Scenario C

Row	New Start Date	New End Date	Original Start Date	Original End Date
1	01/01/2003	12/31/2003	01/01/2003	12/31/2003
2	01/01/2004	12/31/2004	01/01/2004	12/31/2004
3	01/01/2006	12/31/2006	01/01/2006	12/31/2006

If we attempt to change the New Start Date in row 2 to 01/01/2005 and the New End Date to 07/01/2005, the original data will still exist. The new data will become a new row since we changed the Start Date. If we also attempt to change the New Start Date in row 3 to 06/01/2005 and the New End Date to 12/31/2005, the original data will still exist. The new data will become a new row since we changed the Start Date also for row 3. The New Start Date of 06/01/2005 will overlap with the new data in row 2.

The system will display the following error once the upload is attempted. “Row 2 has a new date range that overlaps with the new date range of row 3 and they both are for the same list, currency, product, and UOM. Processing stopped.”

Once the error is corrected by changing the New End Date to 05/31/2005 in row 2, the upload will create the following rows in the database:

1. Original range of row 1 (01/01/2003 — 12/31/2003)
2. New range of row 2 (01/01/2005 — 05/31/2005)
3. Original range of row 2 (01/01/2004 — 12/31/2004)
4. New range of row 3 (06/01/2005 — 12/31/2005)
5. Original range of row 3 (01/01/2006 — 12/31/2006)

Uploading Price List Data

To update PeopleSoft tables with new price list data:

Updating PeopleSoft tables with new data is a two-step process.

1. Click the Upload button on the price maintenance toolbar.

The spreadsheet is copied to the nVision/Instances directory on your hard-drive as both an .xls and a .dat file. The .dat file is the input file for the Import Price Lists process in the Structure Pricing menu.

When you click the Upload button, the system marks all the rows you have altered—the marked rows appear in italic.

Note. If you receive an error message, create the following two directories in Microsoft Explorer: C:\User\NVISION\INSTANCE and C:\User\NVISION\AYOUT and try the upload again.

2. Access the Import Price Lists page to run the Import Price Lists process to complete the price upload.

Price Maintenance Setup and Technical Information

An .XNV file that contains specific information for the nVision link determines the spreadsheet layout for the price maintenance worksheet. When you download data from PeopleSoft Order Management, the .XNV file acts as a template for the .XLS file that's created. To change the layout of the template, be sure to make changes in the .XNV file. Changes in the .XLS file apply only to a single download.

Note. In order for price maintenance to function properly, use a nVision report under business unit US001. US001 is part of the system data delivered with the system.

INI File in the OMPLST.XNV File

All reference data, such as report ID and business unit, is contained in the INI file found in the OMPLST.XNV file. Sections that are open for changes are highlighted. Everything else is protected and should not be changed. Additional details about the INI file are included in the OMPLST.XNV file.

Note. If you delete business unit US001, change the INI tab in order for price maintenance to function properly.

The system administrator should confirm that the configuration settings match the settings in the INI file.

Security

The price maintenance function is password protected. All relevant key fields are protected to ensure the successful exchange of information from the spreadsheet to the PeopleSoft tables. No new rows may be added or existing records deleted in the spreadsheet.

Protection mode may be set to *N* (No) in the INI file by unprotecting the INI file and changing the entry for General Settings, ProtectSheet to *N*. Be sure that in production mode, protection is enabled.

The password (value: “password”) is stored in the macro (.XLM) and is not accessible if you run the .XNV file with a compiled version (.XLA).

Workstation Setup

Because you perform price maintenance on a client workstation, all users who will be using this functionality must have the following setup in place on their workstations.

1. Microsoft Excel 97 (or higher) for Windows 95 (or higher).

If you run an earlier version of Microsoft Excel, you may get the error message “Named argument not found.”

2. Microsoft Excel layouts OMPRC.XNV and OMPLST.XNV and their compiled versions OMPRC.XLA and OMPLST.XLA.
3. Configuration settings that match the settings in the INI file.

Your system administrator should confirm these settings.

APPENDIX A

PeopleSoft Enterprise Pricer Reports

This appendix provides an overview of PeopleSoft Enterprise Pricer reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

PeopleSoft Enterprise Pricer Reports: A to Z

The following sections list the reports used with PeopleSoft Enterprise Pricer:

- Price List reports.
- Price List nVision reports.

Note. nVision reports must be run from the PeopleTools window client.

Price List Reports

Report ID and Report Name	Description	Navigation	Run Control Page
EOEPPL01 Price List — Price List ID, Currency, and Product ID	Lists price lists by price list ID, currency, and product ID.	Pricing Configuration, Price List Reports, Price List Report Options	EOEP_RUN_1000_PG
EOEPPL02 Price List — Price List ID, Currency, and Product Description	Price lists by price list ID, currency, and product description.	Pricing Configuration, Price List Reports, Price List Report Options	EOEP_RUN_1000_PG
EOEPPL03 Price List — Product ID and Currency	Price lists by product ID and currency.	Pricing Configuration, Price List Reports, Price List Report Options	EOEP_RUN_1000_PG
EOEPPL04 Price List — Product Description and Currency	Price lists by product description and currency.	Pricing Configuration, Price List Reports, Price List Report Options	EOEP_RUN_1000_PG

Product nVision Reports

Report ID and Report Name	Description	Navigation	Run Control Page
OMPLST Price Lists	Price Lists	Must be run from the PeopleTools window client.	OM_PLST.XLS

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
	In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.
	In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.
	In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

business unit	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.
control table	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
cost profile	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost row	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
current learning	A cost transaction and amount for a set of ChartFields.
data acquisition	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data elements	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
dataset	Data elements, at their simplest level, define a subset of data and the rules by which to group them.
	For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.
delivery method type	In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.
directory information tree	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
document sequencing	
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.
event propagation process	In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).
	In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).
	In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template

In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

match group

In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server

Abbreviation for *PeopleSoft MultiChannel Framework server*. Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity

In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL

Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring

Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook

In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency

The ability to process transactions in a currency other than the business unit's base currency.

national allowance

In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

node-oriented tree

A tree that is based on a detail structure, but the detail values are not used.

pagelet

Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

participant

In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object

Each participant object may be related to one or more compensation objects.

See also *compensation object*.

partner

A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle

In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

pending item

In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

record output VAT flag	on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
reference data	Abbreviation for <i>record output value-added tax flag</i> .
reference object	See <i>record input VAT flag</i> .
reference transaction	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
relationship object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
regional sourcing	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
remote data source data	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
REN server	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
requester	Data that is extracted from a separate database and migrated into the local database.
role	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
role user	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
roll up	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
run control	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
run control ID	In a tree, to roll up is to total sums based on the information hierarchy.
	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
	A unique ID to associate each user with his or her own run control table entries.

run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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PeopleSoft®

PeopleSoft Enterprise Pricer 8.8 Reports

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PeopleSoft Enterprise Pricer 8.8 Reports

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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

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- Related documentation.
- Comments and suggestions.

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CHAPTER 1

PeopleSoft Enterprise Pricer Reports

This appendix provides an overview of PeopleSoft Enterprise Pricer reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

PeopleSoft Enterprise Pricer Reports: A to Z

The following sections list the reports used with PeopleSoft Enterprise Pricer:

- Price List reports.
- Price List nVision reports.

Note. nVision reports must be run from the PeopleTools window client.

Price List Reports

Report ID and Report Name	Description	Navigation	Run Control Page
EOEPLL01 Price List — Price List ID, Currency, and Product ID	Lists price lists by price list ID, currency, and product ID.	Pricing Configuration, Price List Reports, Price List Report Options	EOEP_RUN_1000_PG
EOEPLL02 Price List — Price List ID, Currency, and Product Description	Price lists by price list ID, currency, and product description.	Pricing Configuration, Price List Reports, Price List Report Options	EOEP_RUN_1000_PG
EOEPLL03 Price List — Product ID and Currency	Price lists by product ID and currency.	Pricing Configuration, Price List Reports, Price List Report Options	EOEP_RUN_1000_PG
EOEPLL04 Price List — Product Description and Currency	Price lists by product description and currency.	Pricing Configuration, Price List Reports, Price List Report Options	EOEP_RUN_1000_PG

Product nVision Reports

Report ID and Report Name	Description	Navigation	Run Control Page
OMPLST Price Lists	Price Lists	Must be run from the PeopleTools window client.	OM_PLST.XLS

CHAPTER 2

Report Samples

This chapter provides report samples.

For the online samples of these reports, see the PDF files that are published on CD-ROM with your online documentation.

Sorted by: Price List ID, Currency, Product ID

SetID: SHARE
Price List: DISTRIB
Currency: USD

Product ID	Description	UOM	Start Date	End Date	Price	Frequency	Status
10002	Long Sleeve T-Shirt, Men's	Each	3/18/1998	3/26/1998	5,570.00		Active
10002	Long Sleeve T-Shirt, Men's	Each	3/27/1998	3/31/1998	5,013.00		Active
10002	Long Sleeve T-Shirt, Men's	Each	4/1/1998	4/3/1998	5,320.00		Active
10002	Long Sleeve T-Shirt, Men's	Each	4/4/1998	10/15/2052	4,460.02		Active

Sorted by: Price List ID, Currency, Product Description

SetID: SAEB1
Price List: DISRBIH
Currency: TSD

Description	Product ID	UOM	Start Date	End Date	Price	Frequency	Status
Lon0 S2eege RISvirt, -enhs	3...9	1Mcv	'a3/a388/	'a96a388/	5,57.4..		Ectige
Lon0 S2eege RISvirt, -enhs	3...9	1Mcv	'a97a388/	'a'3a388/	5,3'4..		Ectige
Lon0 S2eege RISvirt, -enhs	3...9	1Mcv	□a3a388/	□'a'a388/	5,'9.4..		Ectige
Lon0 S2eege RISvirt, -enhs	3...9	1Mcv	□a□a388/	3.a35a9.59	□□6.4.9		Ectige

Sorted by: Product List Direction

<u>Product ID</u>	<u>Category</u>	<u>Description</u>	<u>DIU</u>	<u>Start Date</u>	<u>End Date</u>	<u>Price</u>	<u>Specialty</u>	<u>Order ID</u>	<u>Price List</u>
R222A	HSs	Mo, Saee3e 1/Sn8rtI 9e,65	Cucn	UTRBTRHHB	UTAETRHHB	11102g22		S7.vC	sLSlvL-
R222A	HSs	Mo, Saee3e 1/Sn8rtI 9e,65	Cucn	UTA0TRHHB	UTURTRHHB	112RUg22		S7.vC	sLSlvL-
R222A	HSs	Mo, Saee3e 1/Sn8rtI 9e,65	Cucn	4TRTRHHB	4TUTRHHB	11UA2g22		S7.vC	sLSlvL-
R222A	HSs	Mo, Saee3e 1/Sn8rtI 9e,65	Cucn	4T4TRHHB	R2TR1TA21A	4I4E2g2A		S7.vC	sLSlvL-

Sorted by: Product List Direction

<u>Description</u>	<u>Product ID</u>	<u>Current F</u>	<u>DIU</u>	<u>Start Date</u>	<u>MyC Date</u>	<u>Price</u>	<u>Review F</u>	<u>Open ID</u>	<u>Price List</u>
ho,M S'eeae l3Sn/rtI 8e,96	R222A	.Ss	Cucn	UTRBTRHHB	UTAETRHHB	11102g22		S57vC	sLSlvL-
ho,M S'eeae l3Sn/rtI 8e,96	R222A	.Ss	Cucn	UTA0TRHHB	UTURTRHHB	112RUg22		S57vC	sLSlvL-
ho,M S'eeae l3Sn/rtI 8e,96	R222A	.Ss	Cucn	4TRTRHHB	4TUTRHHB	11UA2g22		S57vC	sLSlvL-
ho,M S'eeae l3Sn/rtI 8e,96	R222A	.Ss	Cucn	4T4TRHHB	R2TR1TA21A	4I4E2g2A		S57vC	sLSlvL-