
PeopleSoft Enterprise Pricer 9.0 PeopleBook

September 2006

PeopleSoft Enterprise Pricer 9.0 PeopleBook
SKU FSCM9EPP-B 0806
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About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, or windows. 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 Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, <http://www.oracle.com/technology/documentation/psftent.html>.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system 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 Enterprise 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 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 the W key.
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.
. . . (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 ().

Typographical Convention or Visual Cue	Description
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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 Enterprise system.

Note. Example of a note.

If the note is preceded by *Important!*, the note 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.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Elements Used in 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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Pricer Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft application fundamentals.
- Common elements used 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 Products

This PeopleBook refers to these products:

- Oracle's PeopleSoft Enterprise Order Management.
- Oracle's PeopleSoft Enterprise Promotions Management.
- Oracle's PeopleSoft Enterprise Billing.
- Oracle's PeopleSoft Enterprise Contracts.

PeopleSoft Application Fundamentals

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

These companion PeopleBooks contain information that applies specifically to PeopleSoft Enterprise Pricer:

- *PeopleSoft Enterprise Application Fundamentals for FIN, ESA, and SCM PeopleBook.*
- *PeopleSoft Enterprise Setting Up Global Options and Reports PeopleBook.*
- *PeopleSoft Enterprise Order Management PeopleBook.*
- *PeopleSoft Enterprise Promotions Management PeopleBook.*
- *PeopleSoft Enterprise Working with Customers and Orders PeopleBook.*
- *PeopleSoft Enterprise 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.
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 is 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 the organization.
Language or Language Code	The language in which you want the field labels and report headings of 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	Designates the appropriate frequency in the Process Frequency group box: <i>Once</i> runs the request the next time that the batch process runs. After the batch process runs, the process frequency is automatically set to <i>Don't Run</i> . <i>Always</i> runs the request every time that the batch process runs. <i>Don't Run</i> ignores the request when the batch process runs.
Process Monitor	This button accesses the Process List page, where you can view the status of submitted process requests.
Report Manager	This button accesses the Report List page, where you can view report content, check the status of a report, and see content detail messages (which describe the report and the distribution list).
Run	This button accesses 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 an organization's structure and processing options.
User ID	The system identifier for the individual who generates a transaction.

CHAPTER 1

Getting Started with Enterprise Pricer

This chapter provides an overview of Enterprise Pricer and discusses Enterprise Pricer implementation.

Enterprise Pricer Overview

Enterprise Pricer enables realtime dynamic pricing for quotes and orders based on company pricing policies. You can define rules that determine what discounts, surcharges, or product adds 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. Enterprise Pricer consists of these pricing elements that you use to create a 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 determines the product price based on either a predefined search hierarchy for the transaction or the product's lowest price on any associated active price lists.

See [Chapter 5, “Creating Price Lists,” page 49](#).

- Price rules.

These define the conditions under which the adjustments (formulas) are applied to the base price. Multiple rules can apply when conditions of each rule are met. In addition, if a price rule contains multiple formulas, more than one price rule can apply during arbitration if the order line or order match the price rule formula requirements.

See [Chapter 6, “Creating Price Rules,” page 55](#).

- Arbitration plans.

The arbitration plan filters and sort the matching price rules to further determine which price rules are applied and in what order.

See [Chapter 7, “Using the Arbitration Plan,” page 101](#).

- Pricing simulator.

This enables you to test most pricing scenarios to determine whether the pricing adjustments create the desired results.

See [Chapter 8, “Working With the Pricing Simulator,” page 115](#).

Enterprise Pricer Implementation

Enterprise Pricer does not require table-loading implementation steps. In the planning phase of an 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 of the *PeopleSoft Enterprise Application Fundamentals PeopleBook* with information about where to find the most current version of each.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, “PeopleSoft Enterprise Application Fundamentals PeopleBook Preface”.

CHAPTER 2

Understanding Enterprise Pricer

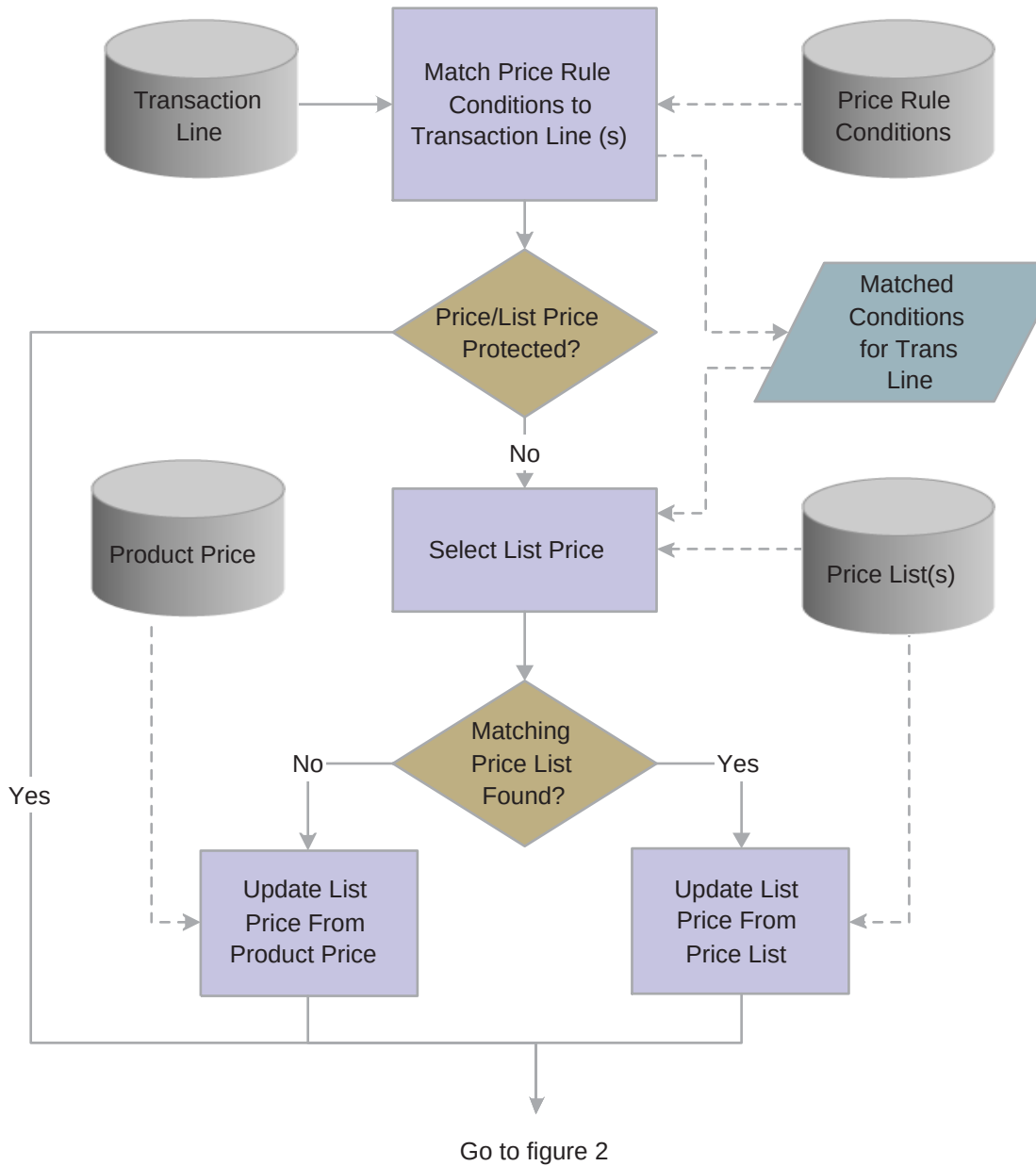
The chapter discusses:

- Price determination.
- Period-to-date pricing.
- Cost-plus pricing.
- Weight and volume pricing.
- Additional pricing options.

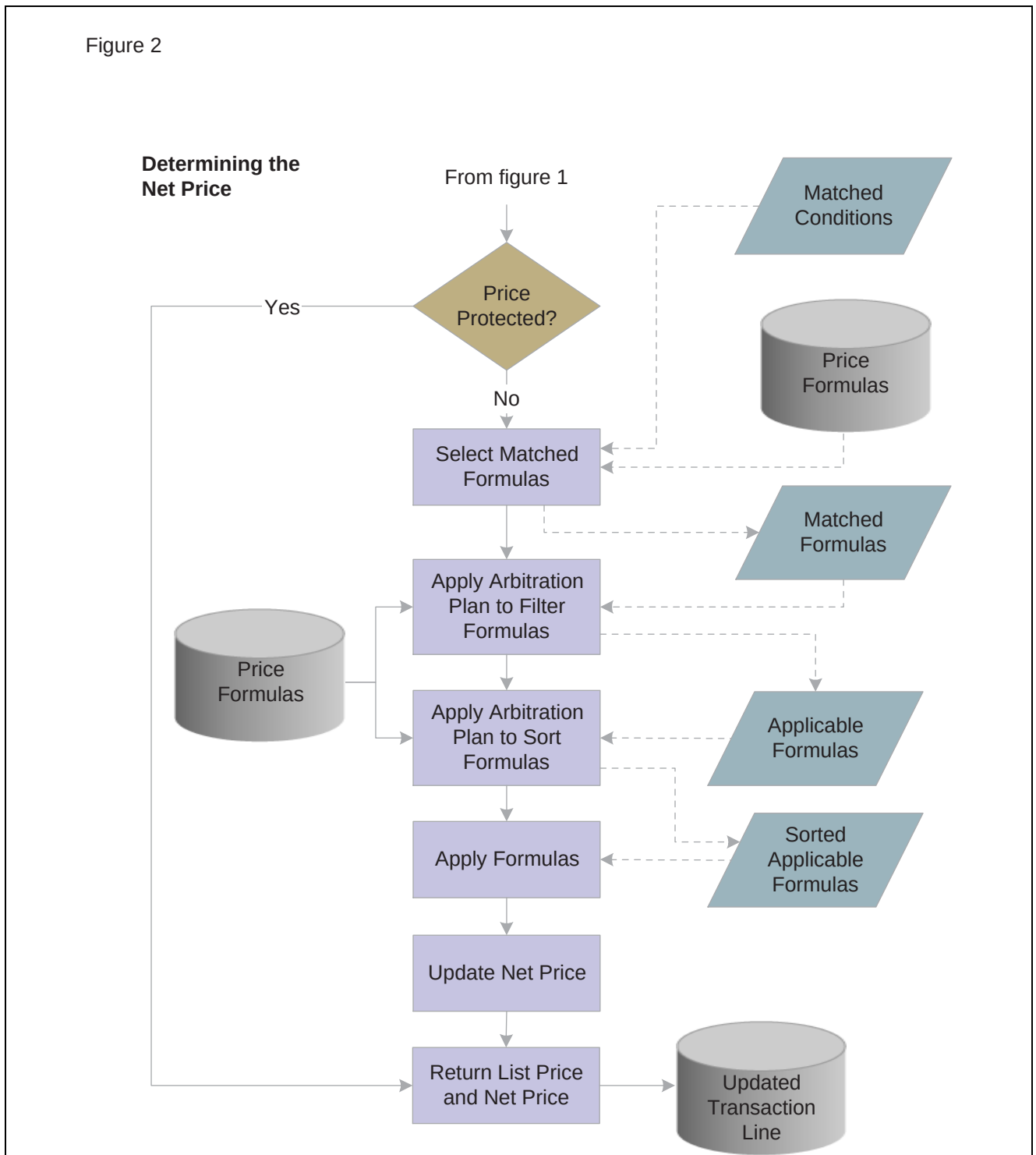
Price Determination

This diagram provides an overview of how list price and net price are determined for each transaction line during the transaction process.

Figure 1

Determining the List Price

Price determination process (1 of 2)



Price determination process (2 of 2)

During order entry, when the customer service representative (CSR) creates or modifies a sales order, quote, or contract (when using PeopleSoft Contracts), Enterprise Pricer is called.

First, Enterprise Pricer uses this process to determine the list price for the transaction line:

1. Find all price rule conditions that match the transaction line.

2. Check whether the transaction line is list price protected.

For example, in a given sales order, if the order line product price is derived from the buying agreement and the buying agreement price is a list price and List Price Protected is set to *Yes*, then the list price determination step is skipped and the system moves on to determine the net price for the transaction line. , it is also list price protected.

Note. If the transaction line is price protected

3. If the transaction line is not list price protected, find a price list for the product on the transaction line.
If the transaction line matches the condition of a price rule that is linked to the price list, the price list is considered for the transaction line.
The best (lowest) price for price lists associated with price list fields is selected if Consider All Prices is defined for the application.
The base product price is selected for the list price if the system finds no price defined for the product in the price lists. This is always the default.

Note. The arbitration plan is not used to select or sort price lists.

Second, Enterprise Pricer determines the net price for the transaction line:

1. Check to see whether the transaction line is price protected.
If Price Protected is set to *Yes* then price formulas (adjustments) are not applied to the transaction line. The net price determination step is skipped and the system sets the list price and the net price to the same value on the transaction line.
2. If Price Protected is set to *No*, then retrieve the stored conditions that match the transaction line and match those conditions to their associated price formulas from the price rules.
3. Apply the arbitration plan to filter the list of formulas to only those that apply to the transaction line.
The selected formulas are ones that either end in a decision node or end at the leaf level of the decision tree.
4. After the list of price formulas is narrowed to only the formulas that apply to the transaction line, sort the formulas according to the hierarchy outlined by the arbitration plan.

Note. For PeopleSoft Order Management transactions (sales orders and quotes), when a buying agreement is in effect for the sold to customer or pricing customer group, the system skips the list price determination process because the list price is established by the buying agreement. If adjustments to the buying agreement are allowed, Price Protected is set to *No* and Enterprise Pricer determines net price with applicable adjustments using the appropriate arbitration plan. If adjustments to the buying agreement are not allowed, Price Protected is set to *Yes* and the list price and the net price returned to the transaction line are equal to the price specified on the buying agreement.

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 PeopleSoft 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, 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 set up online pricing installation options, pricing during order entry will occur in the background or when you save or click the price order button from the Order Entry page or the Shipment Schedules page.

Note. The entire sales order or quote, including previously entered lines, is priced every time a line or schedule is priced. This includes applying new adjustments or removing prior adjustments, unless they are price protected.

Period-To-Date Pricing

This section discusses:

- Reprice or charge orders.
- Period-to-date caps.
- Period-to-date adjustment review.
- Period-to-date pricing dates.
- Period-to-date pricing setup.

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 orders.

Reprice or Change Orders

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

Period-To-Date Caps

A warning message appears 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.

For example: a period-to-date price rule is created for customer USA01 and Product ID 10001. The price formula is for 1 EA to 100 EA. The existing sales orders for this customer and product total 95 EA. A new sales order for customer USA01 and product 10001 is entered with an order quantity of 10, which puts the cumulative orders over 100 EA. If there are no other price formulas on this price rule (over 100 EA), a warning is issued to the CSR. The CSR can create two order lines to maximize the adjustment for the customer:

- One for 5 EA or less.
- One for the remaining quantity.

Period-To-Date Adjustment Review

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 appear with the other standard price adjustments and is 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 a PeopleSoft Order Management business unit and sold to customer along with the product, quantity, and other order information.

Period-To-Date Pricing Dates

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

Also, do not archive the ORD_SCH_ARCH table if you use the new One-Time-Only or Maximum Quantity price rule features.

Period-To-Date Pricing Setup

To set up period-to-date pricing so that price adjustments are based on a customer's period-to-date sales order totals:

1. Define the pricing period using the Sales Calendar page.
2. Select the calendar to use on the Order Management Setup Business Unit page.

If PeopleSoft Promotions Management is installed, you are prompted to use period-to-date pricing after saving the business unit. The system searches for the Calendar ID in PeopleSoft Promotions Management.

3. Select the period-to-date option on the Price Rule - Formulas page.

Note. If PeopleSoft Promotions Management is installed and you want 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 merchandising activities for a customer promotion or in the Allowance Limitations group box when defining discounts for a national allowance.

Cost-Plus Pricing

You can now price based on a price other than a list price, such as cost or alternate cost. Previously, all pricing calculations, such as discount or surcharge, were based on list price. The list price came either from the price list or the list price of the product. Now the system must first determine the base price for pricing calculations.

If the order line is associated with a buying agreement, the base is always the buying agreement price.

With cost-plus pricing, you can set up a price rule to indicate the pricing base based on certain conditions. If there is no such price rule matched to the transaction line, the list price is used as the base price. If there are matching price base price rules, the order's arbitration plan is used to filter and sort the matching rule to determine the base. If there is no match in the arbitration plan, the list price (the default) is used).

The arbitration plan should have a node with a price rule type of "pricing base," ideally as the first top-level node in the tree. It can have only one of these decisions as its child:

- Use Highest Base: Compare list price and cost and use the larger as the pricing base.
- Use Lowest Base: Compare list price and cost and use the smaller as the pricing base.
- Use Cost as Base: Use cost as pricing base.
- Use List Price as Base: Use list price as pricing base.

- **Use Alt Product Cost:** Use an alternate product cost as pricing base.

After determining the base, the other matching price rules are processed and the selected base is used for all the pricing calculations. However, several additional flags on the price rule specify whether or not the rule applies to transaction lines with a specific pricing base:

- **Applicable to List Price flag:** When enabled, indicates that the price rule applies to transaction lines using list price as the pricing base.
- **Applicable to Buying Agreement:** When enabled, indicates that the price rule applies to transaction lines using a buying agreement as the pricing base.
- **Applicable to Cost Base:** When enabled, indicates that the price rule applies to transaction lines using cost as the pricing base.
- **Applicable to Alt Cost Base (Applicable to Alternate Cost Base):** When enabled, indicates that the price rule applies to transaction lines using alternate cost as the pricing base.

For example, if the pricing base for a specific transaction line is cost, a matching price rule that is not applicable to cost as a base is ignored.

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 page during order entry. If there isn't a weight and volume option entered on the Order Entry Form page, a warning message appears, alerting the clerk that weight and volume pricing is used for the PeopleSoft Order Management business unit and to select a weight and volume option for the system to 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 is calculated when the order is saved. If weight and volume was calculated manually, it is recalculated at save time.

See Also

PeopleSoft Enterprise Order Management 9.0 PeopleBook, "Maintaining Order Header and Line Information"

Additional Pricing Options

This section discusses:

- Single-tiered pricing rule.
- Multiple-tiered pricing rules.

- Discounted giveaways and “buy one, get one free” rules.
- Different product pricing and ordering units.
- Advanced pricing calculation in a price rule.

Single-Tiered Pricing Rule

Tiered pricing enables different pricing on portions of a schedule. It is used with quantity or price formula breaks. The formula breaks should not overlap. Tiered rule pricing is only available for price rules with a Price Action Type of *Discount/Surcharge* and *Price Override*.

Consider this example: We have a price rule and schedule set up for selling sinks.

Price rule: Sinks Rule 1

Price action type: discount/surcharge

Rollup flag by: schedule

Tiered Pricing: yes

Condition: Product ID=10050–10060 (these items are all sinks)

Formulas:

Formula range ID	Minimum and maximum quantities	Discount
1	1 to 10	5 percent
2	11 to 20	10 percent
3	21 to 99	20 percent

The schedule line lists a quantity purchase of 25 sinks. The first 10 sinks get a 5 percent discount. The next 10 sinks get a 10 percent discount. The rest of the sinks get a 20 percent discount. Three pricing schedules are generated for the same order schedule.

Multiple-Tiered Pricing Rules

There are instances where multiple-tiered rules are applied to the same schedule. Because different price rules use different quantity breaks, the quantities are merged by net price. With a cascading adjustment method, subsequent adjustments are applied to the existing price schedules. Additional pricing schedules are created as needed.

For example, assume we have already created the price rule described in the previous section. Now we add an additional price rule:

Price rule: Sinks Rule 2

Price action type: discount/surcharge

Rollup flag by: schedule

Tiered Pricing: yes

Condition: Product ID=10050–10060 (these items are all sinks)

Formulas:

Formula range ID	Minimum and maximum quantities	Discount
1	1 to 15	1 percent
2	16 to 30	2 percent

Based on this tiered rule, the first 15 sinks receive a one percent discount. The rest of the 10 sinks get a two percent discount. The quantities and the related adjustments from both price rules are calculated first then merged by net price.

These are the quantities and related adjustments from the price rule “Sinks Rule 1.”

Quantity group	Quantity	Discount	Formula
A	10	5 percent	1
B	5	10 percent	2
C	5	10 percent	2
D	5	20 percent	3

These are the quantities and related adjustments from the price rule “Sinks Rule 2.”

Quantity group	Quantity	Discount	Formula
E	10	1 percent	1
F	5	1 percent	1
G	5	2 percent	2
H	5	2 percent	2

Comparing the results from both price rules we know that the first 10 sinks get a five percent discount from the Sinks Rule 1 and a one percent discount from the Sinks Rule 2 for a total of six percent discount and end up with the same net price. Similarly, the next five sinks, get a 10 percent discount from the Sinks Rule 1 and a one percent discount from the Sinks Rule 2 for a total of 11 percent discount and end up with the same net price. Grouping the quantity by same net price will give us the final pricing schedules:

Pricing schedule	Quantity	Discount	Formulas	Quantity group
1	10	–6 percent	–5 percent Sinks Rule 1, Formula ID 1, and –1 percent Sinks Rule 2, Formula ID 1	A and E

Pricing schedule	Quantity	Discount	Formulas	Quantity group
2	5	–11 percent	–10 percent Sinks Rule 1, Formula ID 2, and –1 percent Sinks Rule 2, Formula ID 1	B and F
3	5	–12 percent	–10 percent Sinks Rule 1, Formula ID 2 and –2 percent Sinks Rule 2, Formula ID 2	C and G
4	5	–22 percent	–20 percent Sinks Rule 1, Formula ID 3, and –2 percent Sinks Rule 2, Formula ID 2	D and H

Discounted Giveaways and “Buy One, Get One Free” Rules

Promotional pricing efforts are attempts to attract new customers, to get customers to try new products, or to liquidate excess inventory. A common promotion is to offer a free or discounted product if the customer purchases a particular product, often called a Buy-One-Get-One or BOGO. Enterprise Pricer enables you create BOGO price rules and also to create price rules that allow the customer to buy one product and get a different product at a discounted rate.

Enterprise Pricer enables you to define complex BOGO and BOGO-like promotions. You can specify the quantity of the giveaway and indicate the discount, surcharge, or price. Some sample types of promotional discounts that are possible include:

- Buy one of product A, get one of product B free.
- Buy two of product A, get four of product B at a 50 percent discount, and any additional purchases of product B at 10 percent off.
- Buy one of product A, get one of product B at 50 percent discount per line.
- Buy six of product A, get three of product B at 10 percent discount per order.
- Buy five pounds of product A, get 10 pounds of product B at 20 percent off.

See Also

Chapter 6, “Creating Price Rules,” page 55

Different Product Pricing and Ordering Units

Numerous industries have a different ordering unit of measure and pricing unit of measure. For example, in the paper industry typically orders are made in rolls. However, the product is priced per hundred-weight (CWT). Enterprise Pricer enables you to order in one unit of measure but define a different pricing unit of measure for the price rule. This enables the pricing engine to calculate the item price using a different unit of measure from the order unit of measure. When the order line is processed, the price based on the order UOM appears on the sales order page. Pricing results based on the pricing UOM appear on the Pricing Detail page.

Advanced Pricing Calculation in a Price Rule

Achieving pricing goals specific to the needs of an organization is a crucial element to success in selling products. Sometimes this requires the ability to define organization-specific formulas that use a series of different operands. Enterprise Pricer enables you to create mathematical expressions in the price rule that is used to calculate the net price for a given product. This allows you to define complex promotional discounts where you specify the adjustment, override price, giveaway quantity using a custom mathematical expression. For example: a 5 percent discount plus a 5 USD discount to all orders of product 10050 during the ordering period February 1, 2005 to December 31, 2005.

With Enterprise Pricer, you can:

- Define custom mathematical expressions, using the expanded set of pricing operands.
- Use the expanded list of variables known to Enterprise Pricer (net price, list price, and so forth).
- Define pricing variables for use with one or more price rule.
- Cap the mathematical expression calculations, for example, (List Price *.95) or USD 1000, whichever is smallest.

Using Indexes in Pricing Calculations

In PeopleSoft Contracts, IndexStartValue, IndexEndValue, and IndexStartAmount are pricing variables that are used in the mathematical expression attached to price formula. They are used for price index calculations. IndexStartValue and IndexEndValue are price index values effective on IndexStartDate and IndexEndDate that are automatically retrieved by the Enterprise Pricer during the pricing process from RT_RATE_TBL.

Note. IndexStartValue, IndexEndValue, and IndexStartAmount are used together. If one is used, you cannot use any other pricing variables.

The RT_RATE_TBL table is used to maintain the price index data:

Field Name	Description	Used By Enterprise Pricer
RT_RATE_INDEX	Market Rate Index	Identify the index. Its category must be "Economic Indicator," as defined in table RT_INDEX_TBL.
TERM	Term	N/A
FROM_CUR	From Currency Code	Both currency codes, FROM and TO must be the same. They match the transaction's currency.
TO_CUR	To Currency Code	Both currency codes, FROM and TO must be the same. They match transaction's currency.
RT_TYPE	Rate Type	N/A
EFFDT	Effective Date	Used to select effective index value.
RATE_MULT	Rate Multiplier	Index value.
RATE_DIV	Rate Divisor	N/A

Field Name	Description	Used By Enterprise Pricer
SYNCID	Synchronization ID	N/A
LASTUPDDTTM	Last Update Date/Time	N/A

As an example, suppose these market rates exist:

Market Index	Effective Date	Rate (Index Value)
CPI	January 1, 2000	1200
CPI	July 1, 2000	1280
CPI	January 1, 2001	1300
CPI	July 1, 2001	1320
GOV	January 13, 2000	100.20
GOV	June 20, 2000	100.40
GOV	December 11, 2000	100.80
GOV	March 1, 2001	101.10

Then a rate renewal takes place:

Current Offering Amount	Start Date	End Date	Renewal Basis	Price Index	Additional Percent	Price Cap Basis	Cap Percent
10,000	February 1, 2000	January 31, 2001	Index+ additnl percent	CPI	2	Percent	5
10,000	February 1, 2000	January 31, 2001	Additnl percent	GOV	1.5	Index + Additnl percent	1

You can set up price rule formulas to address the rate change:

Formula ID	Adjustment Flag	Numeric Value	Text Value (Math Expression)	Market Rate Index	Select Small/Larger
1	Percentage and Math Expression	5	IndexStartAmount * (1 + (IndexEndValue - IndexStartValue) / IndexStartValue + 2 / 100)	CPI	Smaller

Formula ID	Adjustment Flag	Numeric Value	Text Value (Math Expression)	Market Rate Index	Select Small/Larger
2	Percentage and Math Expression	1.5	$\text{IndexStartAmount} * (1 + (\text{IndexEndValue} - \text{IndexStartValue}) / \text{IndexStartValue} + 1 / 100)$	GOV	Smaller
3	Percentage and Math Expression	2	$\text{IndexStartAmount} * (\text{IndexEndValue} / \text{IndexStartValue})$	GOV	Larger

The starting values are:

- $\text{IndexStartAmount} = 10000$.
- $\text{StartDate} = \text{February 1, 2000}$.
- $\text{EndDate} = \text{January 31, 2001}$.

The first formula is processed in this manner:

For the *CPI* market rate index, the Market Rate Table is used to find the index values for the start and end date, 1200 and 1300. The mathematical expression is evaluated as:

$$\text{IndexStartAmount} * (1 + (\text{IndexEndValue} - \text{IndexStartValue}) / \text{IndexStartValue} + 2 / 100) = 10000 * (1 + (1300 - 1200) / 1200 + 2 / 100) = 10000 * (1 + 0.0833 + 0.02) = 11033$$

The percentage calculation is, $10000 * (1 + 5 / 100) = 10500$

Because the formula indicates to take the smaller of the two values (11033 and 10500), 10500 is the result of the formula.

The second formula is processed in this manner:

For the *GOV* market rate index, the Market Rate Table is used to find the index values for the start and end date, 100.20 and 100.80. The mathematical expression is evaluated as:

$$\text{IndexStartAmount} * (1 + (\text{IndexEndValue} - \text{IndexStartValue}) / \text{IndexStartValue} + 1 / 100) = 10000 * (1 + (100.80 - 100.20) / 100.20 + 1 / 100) = 10000 * (1 + 0.0060 + 0.01) = 10160$$

The percentage calculation is $10000 * (1 + 1.5 / 100) = 10150$

Because the formula indicates to take the smaller of the two values (10160 and 10150), 10150 is the result of the formula.

The third formula's processing uses index values to perform different types of calculations:

For the *GOV* market rate index, the Market Rate Table is used to find the index values for the start and end date, 100.20 and 100.80. The mathematical expression is evaluated as:

$$\text{IndexStartAmount} * (\text{IndexEndValue} / \text{IndexStartValue}) = 10000 * (100.80 / 100.20) = 10000 * 1.0060 = 10060$$

The percentage calculation is $10000 * (1 + 2 / 100) = 10200$

Because the formula indicates to take the larger of the two values (10060 and 10200), 10200 is the result of the formula.

See Also

[Chapter 6, “Creating Price Rules,” page 55](#)

CHAPTER 3

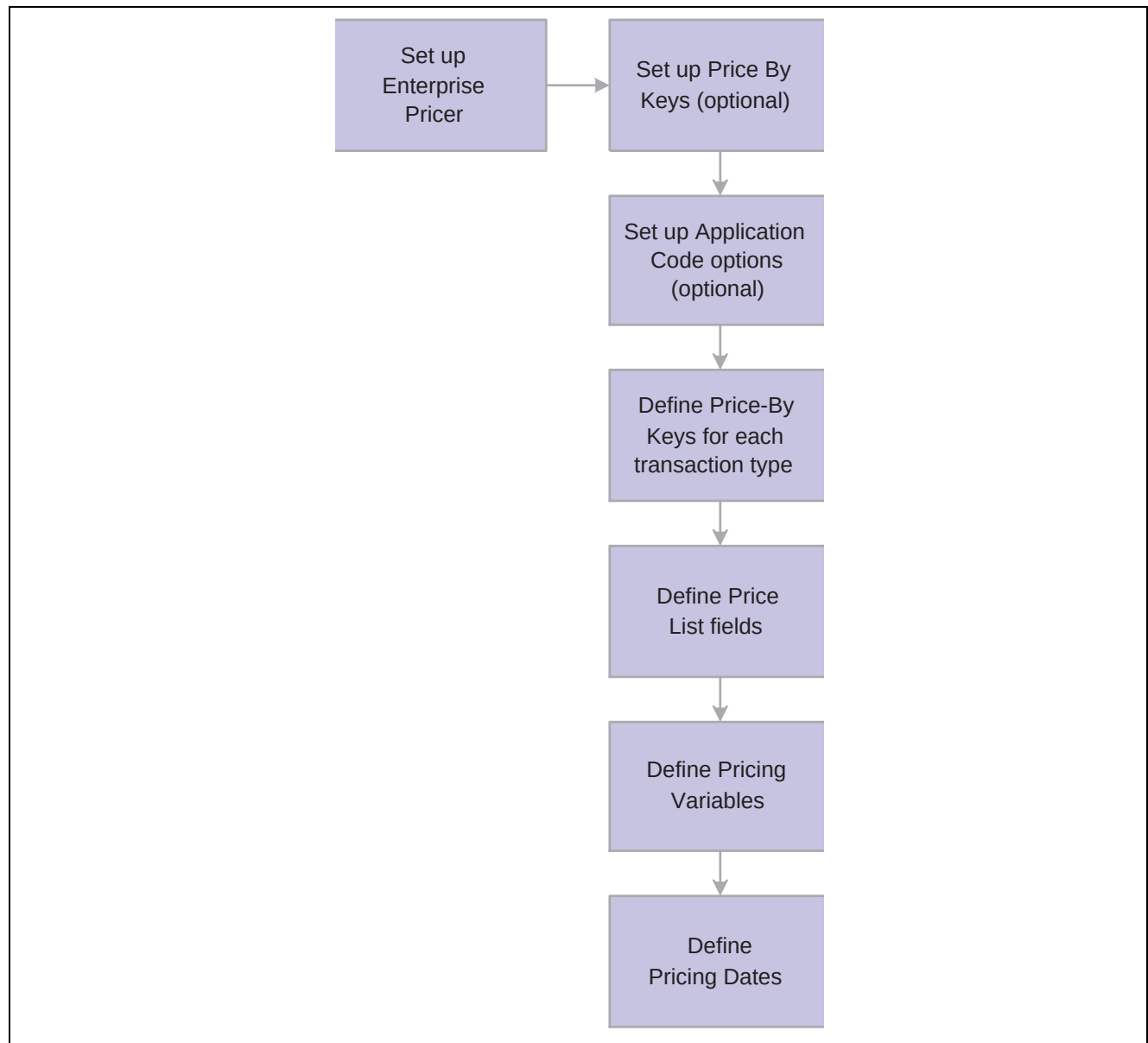
Implementing Enterprise Pricer

The chapter provides an overview of Enterprise Pricer implementation and discusses how to:

- Set up Enterprise Pricer (optional).
- Establish pricing options.

Understanding Enterprise Pricer Implementation

This diagram provides an overview of the tasks that comprise the Enterprise Pricer setup process.



Pricing setup overview

The setup for Enterprise Pricer is separated into two segments: performing setup tasks and establishing pricing options. The options tasks are simpler tasks that involve defining key fields appropriate to the enterprise. Setup tasks are optional and are more complex and involve adding additional fields and completing significantly more complex tasks.

Note. The general Enterprise Pricer user should not have access to the setup pages. These pages are available to the Enterprise Pricer developer to modify the Enterprise Pricer system data. You can set up the Enterprise Pricer data entry pages, but this is not required for a standard implementation of Enterprise Pricer. The system data described in this chapter are delivered for each pricing transaction implementation.

Setup Tasks

A predetermined set of price-by key fields and price list fields are delivered as part of the standard pricing implementation, but the person administering Enterprise Pricer should know that these areas are available for customizations. If a new pricing key is added, the developer must also customize both online and batch pricing to use the new key. In general, these pages are not accessed; however, it is important that you understand how these pages are used to create a pricing structure. Setup tasks, such as expanding the list of price-by keys or expanding the list of price list fields, are considerably more complex. Only a knowledgeable PeopleSoft application developer or information technology person should perform these tasks.

The implementation options are:

1. Set up Price-by Keys: The All Price-by Key Fieldnames page contains the standard list of available fields that are used when defining price rule conditions at the line level.
All delivered price-by keys are available at implementation. Here you can add fields that are considered for price list determination and price rule creation.
2. Set up Transaction Code Options: The options for each transaction are delivered as system data and appear on the online pricing pages.
They also determine how Enterprise Pricer prices each transaction. Changes to these pages are considered a customization and are not supported by PeopleSoft.

Warning! The Enterprise Pricer application is delivered with standard setup data for the supported applications. Any changes made to the standard delivered data, or customer created pricing variables and dates, and custom mathematical expressions created by the customer are considered system customization and are not supported.

Pricing Options

The basic setup options task are:

1. Set up system pricing keys on the All Price-by Fieldnames page.
This defines the list of record fields that are used by the system.
2. Set up the application on the Price Transaction Code page.
This sets up the options for the application by defining the acceptable transaction codes.
3. Set up the price-by keys for the application using the Transaction Price-By Keys page.
This identifies the price-by keys used by the application when defining price lists and price rules.

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.

4. Set up the pricing dates for the application on the Pricing Variables page.
This defines the pricing date variables used in the creation of price rules and arbitration plans. The dates are used to create breaks on the formula and select price lists.
5. Set up the pricing variables for the application on the Pricing Dates page.
This defines the pricing variables used for price formulas when creating price rules. The Pricing Variables page is used to establish the variables to use for calculating the net price using mathematical expressions.

Setting Up Enterprise Pricer

This section provides an overview of transaction code options and discusses how to:

- Set up price-by key fields.
- Set up transaction code options.

Note. This section is optional. If you are not modifying standard setup data in PeopleSoft Enterprise Pricer, you do not need to complete the tasks discussed in this section. You can continue to the next implementation step. Any modification to the standard setup data is considered a customization and is not supported.

Understanding Transaction Code Options

The options for each transaction are delivered as system data and appear on the online pricing pages. They also determine how PeopleSoft Enterprise Pricer is used to price each transaction. This table lists the setup options for each transaction:

	Contract	Sales Order, Buying Agreement, Batch	Weight and Volume
Valid Action Types	• Discount/Surcharge • Price Override • Minimum/Maximum Target Discount • Min/Max Target Price • Min/Max Target Surcharge • Related Business Objects	• Discount/Surcharge • Pricing Base • Rollup Only Rule • Minimum/Maximum Margin • Price Override • Product Add • Total Order Discount/Surcharge • Minimum/Maximum Target Discount • Minimum/Maximum Target Price • Minimum/Maximum Target Surcharge • Price List Only Condition • Related Business Objects	Discount/Surcharge
Valid Adjustment Methods	• Cascading • Summed	• Cascading • Summed	Summed

	Contract	Sales Order, Buying Agreement, Batch	Weight and Volume
Valid Price Types	• Extended Price • Quantity	• Extended Price • Quantity	• Volume • Weight
Transaction Code Options	Use Price Index	• Use Alter Cost Based Pricing • Use Buying Agreement • Use Cost Based Pricing • Use Exclusive Pricing • Use External Application Class • Use KVI/NDP (known value items/non-discountable products) Products • Use mathematical Expression • Use Maximum Quantity • Use Mutually Exclusive Rule • Use One-Time Only Price Rule • Use Payment Terms on Formula • Use Period-to-Date • Use Quantity in Price List • Use Rule Distribution Accounts • Used Tiered Pricing • Use Trade Promotions	• Use Rule Distribution Accounts • Use Payment Terms on Formula • Use One-Time Only Price Rule • Use Mutually Exclusive Rule

Differences in Pricing Methods Between PeopleSoft CRM and PeopleSoft SCM

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

- PeopleSoft CRM uses the recurring and frequency flags when defining the price list.
CRM use product notes on the price list. These options are not available in PeopleSoft SCM.
- In PeopleSoft CRM, the order capture transaction code appears by default.
In PeopleSoft SCM, you can choose the transaction 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 option and PeopleSoft SCM uses the Consider All Prices Price List Lookup option.

Pages Used to Set Up Enterprise Pricer

Page Name	Object Name	Navigation	Usage
All Price-by Key Fields	EOEP_KEYFLDS	Set Up Financials/Supply Chain, Common Definitions, Pricing Registration, All Price-by Key Fieldnames	Set up price-by key fields for all Enterprise Pricer implementations. The values are delivered as system data during installation.
Transaction Code	EOEP_APP_CODE	Set Up Financials/Supply Chain, Common Definitions, Pricing Registration, Price Transaction Code	Set up transaction code options, which set up the data entry pages for each transaction code, and relate the transaction to another transaction.

Setting Up 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. When adding a new record, click the Look up Record button to add new values.
Field Name	Select the transaction field name for the price-by key field. If a new Record is added, click the Look up Field Name button to add corresponding fields.

Setting Up Transaction Code Options

Access the Transaction Code page.

Transaction Code

Transaction	Description	Parent	Price Rule Usage Processor
SO	Sales Order		SCM_OM_PRICER:EOEP_API:SORuleUsageChecker

Valid Action Types
[Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-10 of 12 | [Last](#)

Action Type		
Discount/Surcharge		+ -
Pricing Base		+ -
Rollup Only Rule		+ -
Min/Max Margin		+ -
Price Override		+ -
Product Add		+ -
Total Order Discount/Surcharge		+ -
Min/Max Target Price		+ -
Min/Max Target Discount		+ -
Min/Max Target Surcharge		+ -

Transaction Code page (1 of 2)

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

Adjustment Method		
Cascading		+ -
Summed		+ -

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

Price Type		
Extended Price		+ -
Quantity		+ -

Transaction Code Options
[Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-10 of 16 | [Last](#)

Options		
Use Rule Distribution Accounts		+ -
Use Payment Terms on Formula		+ -
Use Period-to-date		+ -
Use Trade Promotion		+ -
Use Exclusive Pricing		+ -
Use One-Time Only Price Rule		+ -
Use Cost Based Pricing		+ -
Use Tiered Pricing		+ -
Use Mutually Exclusive Rule		+ -
Use Maximum Quantity		+ -

Transaction Code page (2 of 2)

Parent	If you want to use the options from another transaction, select that transaction as the parent. For example, Buying Agreement uses the same options as Sales Order. Therefore, Sales Order is selected as Parent of Buying Agreement and no options is set up under Buying Agreement.
Price Rule Usage Processor	Enter the name of the application class that returns and displays price rule usage for the transaction. The application class implements interface EOEP_API:RuleUsageChecker to: 1) return the price rule usage data during pricing calculation; 2) display the price rule data on the Price Rule page. For example, SCM_OM_PRICER:EOEP_API:SORuleUsageChecker is used for sales order. It is required if the transaction uses these types of price rules: 1) one-time only rule; 2) maximum quantity; 3) period-to-date.
Valid Action Types	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: <i>Discount/Surcharge:</i> Applies a discount or surcharge to the line. <i>Min/Max Margin:</i> When there is a match for the price rule, the order is put on hold as in the case of PeopleSoft Order Management. A schedule is on hold if it hits any “Min/Max Margin” price rules. The hold is taken off automatically when repriced if the order schedule no longer matches any of the “Min/Max Margin” price rules. <i>Min/Max Target Discount:</i> Compares the total discount adjustment, and if it’s outside the specified amount, applies a target discount. <i>Min/Max Target Price:</i> Compares the price adjustment, and if it’s outside the specified range, applies a target price. <i>Min/Max Target Surcharge:</i> Compares the total surcharge adjustment, and if it’s outside the specified range, applies a target surcharge. <i>Price List Only Condition:</i> Attaches price lists to a transaction. Price breaks are not specified on the formula. Note. We recommend that you use the price list-related objects if you do not require a complex price rule condition. <i>Price Override:</i> Applies a new price. <i>Pricing Base:</i> Used to select the base or the starting point for pricing calculation. The pricing base action type does not have associated formulas, but has a flag to indicate the base used if the transaction line matches this price rule. <i>Product Add:</i> In previous releases, this was a giveaway action type. Now you are able to indicate the discount, surcharge or price in addition to the quantity of the giveaway. The giveaway product’s list price is used to calculate the net price. For online sales orders, in PeopleSoft Order Management, the product adds, or giveaways, appear in a separate page or grid so you can choose the ones to add to the order. For batch orders, the product adds are added to the order automatically. <i>Rollup Only Rule:</i> Used to roll up the quantity or amount. Only conditions are used for this type of rules (no breaks are needed). This type of price

rule is used by other price rules, such as Discount/Surcharge price rules, to select the price formulas.

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

Valid Adjustment Methods

Select 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 already was discounted twice, and so on. For example, if the system encounters two discounts: 10 percent and 20 percent off the list price of 100.00 USD, the system applies the discounts in this 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 is 72.00 USD.

Summed: 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 are combined for 30 percent off of 100.00 USD. The unit price for the order schedule line is 70.00 USD.

Note. Summed adjustments are applied after all Cascading adjustments are applied.

Valid Price Types

Select the price types whose values you want to price by. Choose from: *Extended Price, Quantity, Weight, and Volume.*

Transaction Code Options

Select the features that the transaction supports. These options will control the pricing data setup pages and the pricing process. Possible values are:

Use Alt Cost Based Pricing (Use Alternate Cost Based Pricing): This option indicates whether or not the specified transaction uses the Alter Cost Based Pricing feature. Enabling this option results in the Applicable to Alternate Cost Base option appearing on the Conditions page when you define a price rule.

Alternate cost is a different cost than product cost. For example, in Order Management, the alternate cost is product cost with an alternate cost adjustment factor applied.

Use Buying Agreement: This option indicates whether or not the specified transaction uses the Buying Agreement feature. When this option is selected, the transaction can set up price rules that are applied to the buying agreement price and the Applicable to Buying Agreement option appears on the Conditions page when you define a price rule.

Use Cost Based Pricing: This option indicates whether or not the specified transaction uses the Cost Based Pricing feature. Enabling this option results in the Applicable to Cost Base option appearing on the Conditions page when you define a price rule.

Use Exclusive Pricing: This option indicates whether or not the specified transaction uses the Mutually Exclusive pricing feature. With multiple exclusive price rules, if one or more of these rules are matched, only one of them is applied and all other rules, whether they are mutually exclusive or regular rules, are ignored.

Use External Application Class: This option indicates whether or not the specified transaction enables user-defined application classes to calculate the net price.

Use KVI/NDP Products: (use known value items/nondiscountable products): This option indicates whether or not the specified transaction supports KVI/NDP products. For KVI products, Enterprise Pricer does not apply any adjustment to the product's price. For NDP products, Enterprise Pricer does not apply discounts to the product's price that would result in a net price that is less than the starting price (for example, list price or cost plus the first surcharge). In addition, you can select to exclude them from the price rule rollup for price formula matching.

Use mathematical Expression: This option indicates whether or not the specified transaction enables Enterprise Pricer to create adjustments using user-defined mathematical expressions on the Price Formula page. You must set up pricing variables so the system knows what variables are used in the pricing calculation.

Use Maximum Quantity: This option indicates whether or not the specified transaction supports the ability to define price rules that are used until the applied quantity specified is reached.

Use Mutually Exclusive Rule: This option indicates whether or not the specified transaction supports the ability to define price rules that are mutually exclusive rules. With multiple exclusive prices rules, if one or more of these rules are matched, only one of them is applied and all other rules, whether they are mutually exclusive or regular rules, are ignored.

Use One-Time Only Price Rule: This option indicates whether or not the specified transaction supports the ability to define price rules that are "limited use" price rules. On the Price Formula page, you can indicate that the rule is valid only for one time per rule or one time per customer. This option is valid only for Discount/Surcharge, Price Override, Giveaway/Product Adds, and Total Order Discount/Surcharge price rules.

Use Payment Terms on Formula: This option indicates whether or not the specified transaction supports the ability to define price rules that select the payment for each adjustment that has the longest day or month increment from the list of values on the Payment Terms page in PeopleSoft Billing. 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: This option indicates whether or not the specified transaction uses the Period-to-date Pricing feature. Enabling this option will result in the system using period-to-date pricing to calculate price adjustments based on transactions across a predefined time frame, rather than individual transactions.

Use Price Index: This option indicates whether or not the specified transaction uses an index such as the Consumer Price Index (CPI) from an external source for price calculations. The price index feature utilizes the pricing variables and mathematical expression.

Use Quantity in Price List: This option indicates whether or not the specified transaction is allowed to use quantity breaks within the price list.

Use Rule Distribution Accounts: This option indicates whether or not the specified transaction is allowed to view and create accounting distribution details for the adjustments on the price rule.

Use Tiered Pricing: This option indicates whether or not the specified transaction supports the tiered pricing feature. With tiered pricing price rules, you can set up price rules such that different adjustments apply to different ranges in the same transaction line.

Note. This is supported only for price types of Quantity and Price.

Use Trade Promotions: Select to indicate that the transaction supports the Trade Promotion feature.

Establishing Pricing Options

This section provides an overview of pricing options, lists common elements, and discusses how to:

- Select price-by keys.
- Select price list fields.
- Set up pricing dates.
- Set up pricing variables.

Understanding Pricing Options

Enterprise Pricer allows you to create custom variables, mathematical expressions, and dates.

Pricing Variables

Variables are used to establish the fields to use for calculating the net price using mathematical expressions.

The actual expressions are added on the price formula. The expression is validated by the system and tested before saving the formula.

These are the pricing variables that are supported for both Contracts and Order Management:

Contract	Sales Order	Weight & Volume Pricing
• Index End Value • Index Start Amount • Index Start Value	• Alternate Product Cost • Base Price • List Price • Current Net Price • Order Extended Base Price • Order Extended Product Cost • Order Extended List Price • Order Extended Net Price • Product Cost • Rollup Amount • Rollup Quantity	• Rollup Volume • Rollup Weight

Mathematical Expressions

The only operators and functions that are supported by Enterprise Pricer for use when creating custom mathematical expressions appear in this table:

Operator/Function	Description	Example	Notes
+	Add	$1 + 2 = 3$ or $2 + -1 = 1$	If you use negative numbers, you cannot enter a space between the negative sign and the number.
-	Subtract	$2 - 1 = 1$	
*	Multiply	$2 * 3 = 6$	
/	Divide	$6 / 3 = 2$	
**	Exponential	$2 ** 3 = 8$	
()	Parenthesis	$(1 + 2) * 3 = 9$	You can use operation grouping.
Truncate(a,b)	Truncate	$\text{Truncate}(123.45,1) = 123.4$	You must enter a value for both "a" and "b," and "b" cannot be a negative number.
Round(a,b)	Round	$\text{Round}(123.45,1) = 123.5$	You must enter a value for both "a" and "b," and "b" cannot be a negative number.

In this example, variables are set up for list price (LIST_PRICE), product cost (PROD_COST), rollup quantity (ROLLUP_QTY, sum of the quantity of the schedules that match the price rule), and current net price (NET_PRICE). The table lists examples of valid mathematical expressions.

Mathematical Expression	Description
1000	Replace price with 1000.
LIST_PRICE * 0.95	Apply a five percent discount to the list price. This expression is also valid but not as efficient, LIST_PRICE * (100 – 5) / 100.
NET_PRICE - 10	Reduce the current net price (amount) by 10.
TRUNCATE(ROLLUP_QTY / 3, 0)	For a product add, calculate the quantity as buy three and get one.
ROUND(PROD_COST * 1.30 * (1 - TRUNCATE(ROLLUP_QTY – 900) / 100, 0) * 0.05), 2)	This is for a formula break between 1000 and 1500 units. The net price is calculated as: • Add 30 percent markup to the product cost and use that as the base for the discount. • Give five percent discount if the quantity is 1000 through 1099 and ten percent if the quantity is 1100 through 1199. • Round the result to two decimal points. This kind of expression can reduce the need to create multiple formulas. However, you should set the formula break so the calculation is valid. For example, if this example is applied to quantities over 2900, the result can become negative. Note. Enterprise Pricer does not allow a negative net price. If the calculation results in a negative, it is set to zero.

Pricing Dates

Pricing dates are the dates that Enterprise Pricer uses to select price lists and price formulas. They are set up by application. These are the dates used for Contract and Order Management:

Contract	Sales Order, Weight, and Volume Pricing
Effective Date	• Requested Arrival Date • Effective Date • Order Date • Price Date • Schedule Ship Date • System Date

Note. If you add a new pricing date, as long as it isn't a user-defined date, (for example, you are simply changing the label of the date) this is not considered a custom date and does not require additional custom coding efforts.

Common Elements Used in This Section

Transaction to be Priced

Determines the appropriate list of price-by keys to use to price transactions. Values are:

BA (buying agreement): Used to price buying agreement transactions in PeopleSoft Order Management.

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

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

Note. This transaction does not appear in PeopleSoft Supply Chain Management.

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

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

Pages Used to Establish Pricing Options

Page Name	Object Name	Navigation	Usage
Price-by Key Field	EOEP_APPKEY_FIELD	Set Up Financials/Supply Chain, Common Definitions, Pricing Registration, Transaction Price-by Keys, Price By Key Field	Select the price-by fields that are used to price the transaction.
Price List Fields	EOEP_APPLIST_FLDS	Set Up Financials/Supply Chain, Common Definitions, Pricing Registration, Transaction Price-by Keys, Price List Fields	Select valid price-list-related business objects that are used when creating price lists and when defining the price list lookup method.
Pricing Dates	EOEP_DATE_VAR	Set Up Financials/Supply Chain, Common Definitions, Pricing Registration, Pricing Dates	Set up dates used for pricing process.
Pricing Variables	EOEP_PRICE_VAR	Set Up Financials/Supply Chain, Common Definitions, Pricing Registration, Pricing Variables	Set up variables that are used in price rule formulas when defining mathematical expressions.

Selecting 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

Transaction Price-by Key Field page (1 of 2)

▼ Select Price-by Key Fields			
Customize Find View 100  First  1-20 of 149  Last			
Select	Record	Field Name	Description
☐	CA_CONTR_HDR	BUSINESS_UNIT	Business Unit
☐	CA_CONTR_HDR	CONTRACT_NUM	Contract
☐	CA_CONTR_HDR	CONTRACT_TYPE	Contract Type
☐	CA_CONTR_HDR	REGION_CD	Region Code
☐	CA_CONTR_HDR	SOLD_TO_CUST_ID	Sold To Customer
☐	CA_DETAIL	ADDR_SEQ_NUM_SHIP	Address Sequence Number
☐	CA_DETAIL	PRODUCT_GROUP	Product Group
☐	CA_DETAIL	PRODUCT_ID	Product ID
☐	CA_DETAIL	SHIP_TO_CUST_ID	Ship To Customer
☒	EOEP_DERIVED_WK	CUSTOMER_GROUP	Customer Group
☐	EOEP_DERIVED_WK	PRODUCT_GROUP	Product Group
☐	EOEP_DERIVED_WK	REGION_CD	Region Code
☒	ORD_EST_SHIP	CARRIER_ID	Carrier ID
☒	ORD_EST_SHIP	CARRIER_ID_EXP	Export Carrier ID
☒	ORD_EST_SHIP	COMMODITY_CD	Commodity Code
☒	ORD_EST_SHIP	FREIGHT_TERMS	Freight Terms Code
☒	ORD_EST_SHIP	FREIGHT_TERMS_EXP	Export Freight Terms Code
☒	ORD_EST_SHIP	INV_ITEM_ID	Item ID
☒	ORD_EST_SHIP	PRODUCT_ID	Product ID
☒	ORD_EST_SHIP	SHIP_TO_CUST_ID	Ship To Customer

Price-by Key Field page (2 of 2)

Price-by Key Fields

View the current price-by fields for the transaction. You can 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

Select additional price-by fields.

Note. There is no limit to the number of pricing keys that you can define; however, performance is impacted when the number of keys increases. In addition, you might need to change the application code to pass the value to the Enterprise Pricer. For example, if you add a new field for sales orders, you must add code to the sales order to pass the value of the new field when calling Enterprise Pricer. You must perform this customization for both online and batch pricing.

Selecting 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. If the price list and related objects do not require the definition of a complex price condition, we recommend that 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. They are the subset of the Price-by Key Fields for the transaction.

Priority

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

Setting Up Pricing Dates

Access the Pricing Dates page.

Date Name

Input a date variable name. The name must: 1) Start with an alpha character (for example, A-Z); 2) Consist of only alphanumeric characters (for example, A-Z, 0-9) and “_”; 3) Optionally add “&” to the front of the name.

Date Type

Select the date type. Values are:

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

Effective Date The date the transaction takes place, for example, the order date in OM.

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.

Price Date The date specified on the arbitration plan. For example, on the price formula, you can specify Price Date <= January 1, 2005. If the arbitration plan used specifies Price Date = Scheduled Ship Date. When the price formula is evaluated, Scheduled Ship Date <= January 1, 2005 is evaluated.

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. You can, however, enter another date. This option is used only by PeopleSoft Supply Chain Management installations.

System Date: The current server date, that is, the system variable %Date.

User Date: A customer-defined date.

Note. Any User Date defined is not supported by PeopleSoft automatically. Implementation will require the transaction to pass the value for each user date when Enterprise Pricer is called. For example, if you add a user date for sales order, you must add code in sales order to pass the values. For sales orders, we have created an API for you to easily implement required logic. See example implementation class SCM_OM_API:Sample:SamplePricerInputLine for more information. The same API is used to pass customer-defined pricing variables.

Description	Provide a description for the pricing date. It is used when selecting the pricing dates.
Record	Select the record from which you wish to pull the date value. Applies only when the pricing variable selected is <i>User Date</i> .
Field Name	Select the field from which you want to pull the date value. Applies only when the pricing variable selected is <i>User Date</i> .
Note. Enterprise Pricer does not use Record and Field Name to automatically retrieve the value for the user date. They are only for the convenience of the implementation of user dates. For example, you can use the values in these fields to automatically retrieve the value for the user date and pass them to the Enterprise Pricer.	

Setting Up Pricing Variables

Access the Pricing Variables page.

Pricing Variable Name	Input a variable name. The format of the name is the same as pricing dates.
Pricing Variable Type	Select a variable type. All of the variable types, except for <i>User Variable</i>, are Pricer variables whose values are known to Enterprise Pricer, either because the values are computed by the Enterprise Pricer (for example, the current net price), or because they are explicitly passed from the transaction (for example, the product cost by sales order). The variable types are: <i>Base Price:</i> The base price used in the pricing calculation. Select from list price, product cost or alternative product cost, buying agreement price.

Buying Agreement Price: The buying agreement price is used in the pricing calculation.

Rollup Quantity: The rolled-up quantity of the transaction lines that match the price rule. This value is used to select the price formula breaks.

Rollup Amount: The rolled-up amount of the transaction lines that match the price rule. This value is used to select the price formula breaks.

Rollup Weight: The rolled-up weight of the transaction lines that match the price rule. This value is used to select the price formula breaks.

Rollup Volume: The rolled-up volume of the transaction lines that match the price rule. This value is used to select the price formula breaks.

Net Price: The current calculated net price (running net price).

List Price: The list price of the transaction line.

Product Cost: The product cost of the transaction line.

Alternate Product Cost: The alternate product cost of the transaction line. If not provided, value of Product Cost is used.

Index Start Amount: The start amount to apply the index adjustment. It is passed from transaction (for example, Contracts). If it is not provided, value of Base Price is used.

Index Start Value: Price index start value. It is automatically retrieved by Enterprise Pricer based on the index start date specified by the transaction.

Index End Value: Price index end value. It is automatically retrieved by Enterprise Pricer based on the index end date specified by the transaction.

Note. Index Start Amount, Index Start Value, and Index End Value are currently only used by Contracts.

Order Extended Base Price: Sum of the extended base price for the whole order.

Order Extended List Price: Sum of the extended list price for the whole order.

Order Extended Net Price: Sum of the extended net price for the whole order.

Order Extended Product Cost: Sum of the extended product cost for the whole order.

User Variable: Customer-defined variable.

Note. Not all the variables are available in all situations.

Record

Select the record from which you wish to pull the variable value. Applicable only when the pricing variable selected is "User Variable."

Field Name

Select the numeric field from which you wish to pull the variable value. Applicable only when the pricing variable selected is *User Variable*.

Note. Enterprise Pricer does not use Record and Field Name to automatically retrieve the value for the user variable. They are only for the convenience of the implementation of user variables. For example, you can use the values in these fields to automatically retrieve the value for the user variable and pass them to the Enterprise Pricer.

CHAPTER 4

Using Pricing Data Enterprise Integration Points

This chapter provides an overview of pricing data Enterprise Integration Points (EIPs) and discusses how to:

- Send pricing data.
- Review and correct pricing data.
- Load data into Enterprise Pricer.

Understanding Pricing EIPs

This section discusses:

- Pricing EIPs.
- Methods for sending pricing data.
- Staging tables for loading pricing data.

Pricing EIPs

PeopleSoft is delivered with many enterprise integration points (EIPs) to send and receive pricing data with a third-party system. These EIPs are service operations within PeopleSoft Integration Broker.

PeopleSoft delivers the service operations in PeopleSoft Integration Broker with a default status of *Inactive*. You must activate each service operation before attempting to send or receive data from a third-party source or another PeopleSoft system, such as CRM.

Use the information in the table below and refer to the setup instruction in the PeopleSoft Supply Chain Management Integrations 9.0 PeopleBook, “Implementing Integrations” chapter, Setting Up Service Operations section.

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
ARBITRATION_PLAN_FULLSYNC ARBITRATION_PLAN_SYNC This EIP includes all of the data in the Arbitration Plan tables.	Inbound/Outbound Asynchronous	ProcessMessage	No	Third-party
(PRICE_LIST_DETAIL_FULLSYNC, PRICE_LIST_DETAIL_SYNC) This EIP includes only the detail table of price lists. It is provided so that you can separate the header and detail in different messages. For example, when there are many detail records, you might want to separate the header and detail into separate messages to achieve better performance. Note. The Price List Header EIP must already exist in the system. We recommend that you run the Price List Header EIP first.	Inbound/Outbound Asynchronous	ProcessMessage	No	Third-party
(PRICE_LIST_FULLSYNC, PRICE_LIST_SYNC) This EIP 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.	Inbound/Outbound Asynchronous	ProcessMessage	No	Third-party

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
(PRICE_LIST_HEADER_FULLSYNC, PRICE_LIST_HEADER_SYNC) This EIP includes only the header and price rule link tables. It is provided so that you can separate the header and detail in different messages. Use the Price List Detail message for the detail data.	Inbound/Outbound Asynchronous	ProcessMessage	No	Third-party
(PRICE_RULE_DATA_FULLSYNC, PRICE_RULE_DATA_SYNC) This EIP includes all the tables for price rules.	Inbound/Outbound Asynchronous	ProcessMessage	No	Third-party
(PRICE_RULE_KEYS_FULLSYNC) Enterprise Pricer uses a couple of tables to store information about rules to help the rule selection process during pricing. These tables are updated as price rules are updated or changed. The price loader program normally computes and updates these tables. However, in case of full table sync, you can provide existing data to avoid recomputation. If provided, data on this message is loaded when price rule data is loaded.	Inbound/Outbound Asynchronous	ProcessMessage	No	Third-party

See Also

PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook, “Implementing Integrations”
Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Methods for Sending Pricing Data

There are several ways to send pricing data:

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

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

- **Using the Full Table Publish method:** You can send all pricing data with this method.
The pricing data in the target system is replaced. To use this option, you must configure Full Data Publish Rules.
- **Using flat files:** When setting up the Batch Publish Rule or Full Table Publish Rule, you can save the published data to flat files, then load the flat files from the source system. You can use the Inbound File Publish utility to load the file from the source system.

See Also

PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook, “Understanding PeopleSoft Supply Chain Management Enterprise Integration Points”

Staging Tables for Loading Pricing Data

When loading or updating data to Enterprise Pricer, pricing data is loaded into pricing staging tables.

This table lists the pricing enterprise staging tables and the map to application tables in Enterprise Pricer:

EIP Staging Table	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_DRANGE_EC	EOEP_DATE_RANGE	Pricing Date Range Record
EOEP_FRANGE_EC	EOEP_FORM_RANGE	Pricing Formula Range Record

EIP Staging Table	Enterprise Pricer Application Table	Description
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

The Load Pricing Data process (EOEP_PRICE_LOAD) moves the data into Enterprise Pricer. This process validates the data, sets defaults, and loads the valid data into the application tables.

Note. If, during a realtime update, the incoming data fails the validation, the data is left in the staging tables. You can review it there and correct it using the error correction pages. You might need to run the Load Pricing Data process more than one time to ensure that the data is corrected and moved from the staging tables.

This list provides examples of the validation that is done by the Load Pricing Data process.

- If the price rule changes, 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 and a valid price rule.
- Required fields must have 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 clearing the Perform Data Validation option on the Price Loader run control page.

In case of realtime EIPs (EIPs that are sent from the online pricing pages), the Load Pricing Data process runs 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 stored in the staging tables. The Load Pricing Data process is then run to load the data into the application tables.

Sending Pricing Data

This section discusses how to submit background processes to send pricing data.

Page Used to Send Pricing Data

Page Name	Object Name	Navigation	Usage
Pricing Data Publish	EOEP_PRICE_EXTRACT	Pricing Configuration, Pricing Data Exchange, Publish Pricing Data	Submit the background process to send pricing data.

Submitting Background Processes to Send Pricing Data

Access the Pricing Data Publish page.

Pricing Data Publish

Run Control ID: full

Report Manager

Process Monitor

Run

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	SO	RULE-1		31	+ -

Price Rule

Customize | Find |

First 1-2 of 2 Last

	SetID	Price Rule	Updated After Date		
1	SHARE	PM-000000000000000002		31	+ -
2	SHARE	RETAIL		31	+ -

Price List

Customize | Find |

First 1 of 1 Last

	SetID	Price List ID	Currency Code	Updated After Date		
1	SHARE	RETAIL			31	+ -

Last Run On:

Process Instance:

Pricing Data Publish page

- Process Name

Select the name that you want to use to group EIPs that you want to publish together. All EIPs with this name are processed together. Set up process names using the Batch Publish Rules page: Batch Programs tab. To process the EIPs together, enter the same process name for each EIPs on the Batch Programs tab.
- Updated After Date

Select what data you want published by the last update date.
- Arbitration Plan, Price Plan, and Price List

Select at least one value to send the EIPs. You can enter additional values as needed.

Reviewing and Correcting Pricing Data

This section provides an overview of the error correction process, lists common elements, and lists the pages used to correct pricing data.

Understanding the Error Correction Process

When the Load Pricing Data process encounters data that might stop pricing or cause incorrect pricing, this data is not loaded to the pricing tables but remains in the staging tables. You can use inquiry pages to search for errors in these items:

- Arbitration plans and arbitration plan attributes.
- Price rules.
 - Price conditions.
 - Price condition conjunctions.
 - Price formulas.
 - Price rule distributions.
 - Price date ranges.
 - Price formula ranges.
- Price lists.
 - Price list details.
 - Price list-price rule links.
 - Price list details without headers.

The inquiry pages have a similar format and fields. From each inquiry page, you can navigate to the detail page to review and correct the error. After you correct the errors, run the Load Pricing Data process again to move the data into the application tables.

Common Elements Used in This Section

Full Sync

Select:

Y (yes) to select full sync EIPs.

N (no) to not select full sync EIPs.

Status

Select to narrow the search criteria.

Search

Click this button to search after entering search criteria.

Clear

Click this button to clear the search results.



Click the Update button to view and update the errors.

Delete

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

Select this row

Select this option to select a row. Then click the links at the bottom of the page to navigate to the details for the data.

Pages Used to Review and Correct 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	Search for arbitration plan data in the staging tables.
Price Arbitration Attributes	EOEP_ARB_SEQ_INQ	Select a row on the Arbitration Plan Inquiry page and click the Price Arbitration Attributes link.	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.	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.	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	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.	View and correct the error on the price rule.
Price Conditions	EOEP_COND_INQ	Select a row on the Price Rule Inquiry page and click the Price Conditions link.	View price condition data.
Price Condition Detail	EOEP_COND_EC_UPD	Click the Update button on the Price Conditions page.	View and correct the error on the price condition.
Price Condition Conjunctions	EOEP_CONJ_INQ	Select a row on the Price Rule Inquiry page and click the Price Condition Conjunctions link.	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.	View and correct the error on the condition conjunction for the price rule.
Price Formulas	EOEP_FORM_INQ	Select a row on the Price Rule Inquiry page and click the Price Formulas link.	View price formula data for the price rule.
Price Formula Detail	EOEP_FORM_EC_UPD	Click the Update button on the Price Formulas page.	View and correct the error on the price formula for the price rule.
Price Rule Distributions	EOEP_RDST_INQ	Select a row on the Price Rule Inquiry page and click the Price Rule Distributions link.	View price rule distribution data for the price rule.

Page Name	Object Name	Navigation	Usage
Price Rule Distribution Detail	EOEP_RDST_EC_UPD	Click the Update button on the Price Rule Distributions page.	View and correct the error on the price rule distribution for the price rule.
Price Date Ranges	EOEP_DRANGE_INQ	Select a row on the Price Rule Inquiry page and click the Price Date Ranges link.	View price date ranges.
Price Rule Date Ranges	EOEP_DRANGE_EC_UPD	Click the Pen button for the price rule on the Price Formula Ranges page.	View price rule date ranges.
Price Formula Ranges	EOEP_FRANGE_INQ	Select a row on the Price Rule Inquiry page and click the Price Formula Ranges link.	View price formula ranges.
Price Rule Formula Ranges	EOEP_FRANGE_EC_UPD	Click the Pen button for the price rule on the Price Formula Ranges page.	View price rule formula ranges.
Price List Inquiry	EOEP_PRCLST_H_INQ	Pricing Configurator, Pricing Data Exchange, Correct Staging Errors, Price List, Price List Inquiry	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.	View and correct the error on the price list header.
Price List Detail Inquiry	EOEP_PRCLST_D_INQ, EOEP_PRCLST_DH_INQ	Select a row on the Price List Inquiry page and click the Price List Detail Inquiry link.	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.	View and correct the error on the price list detail.
Price List - Price Rule Links	EOEP_RLLNK_INQ	Select a row on the Price List Inquiry page and click the Price List - Price Rule link.	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.	View and correct the error on the price rule for the price list.

Loading Data into Enterprise Pricer

This section discusses how to load pricing data.

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, Price Loader	Load pricing data from the staging tables into the application tables.

Loading Pricing Data

Access the Price Loader page.

Price Loader

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) **Run**

Process Options

*Pricing Data to Load: Price List ▼

☒ Perform Data Validation

☐ Load Full Sync Data

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

Select this option if you want to process data from full sync EIPs. Data received after the last full sync EIP is not processed, and data received prior to the full sync EIP is discarded. If this option is not selected, only incremental sync data received prior to any full sync EIP is processed.

For example, EIPs 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 EIP is processed. If the option is selected, the Price Rule full sync EIP is processed. Because the first Price Rule incremental sync was received prior to the full sync EIP, it is discarded. Also, because the last Price Rule incremental sync EIP is received after the full sync EIP, it is not selected for process. After the Price Rule full sync EIP is processed, the last Price Rule incremental sync EIP is processed from this page.

Note. We recommend that you process the EIPs as soon as you receive them.

Full Sync Error Option

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

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

- No Data Will Be Loaded.

All of the data is left in the staging tables. Existing data in the application tables will not change.

- Valid Rows Will Be Loaded.

If selected, the application table is replaced with valid data from the full sync EIP. Any invalid full sync data is left in the staging table with the full sync flag turned off so that you can correct them and load them later as incremental sync data.

CHAPTER 5

Creating Price Lists

This chapter provides an overview of price lists 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 is associated. These business objects are a subset of the price-by fields, or entities, 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.

The system also allows the use of cost, alternate cost, and buying agreement as a default base price for calculating price adjustments.

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

Quantity Breaks within Price List

You can enter high and low quantity breaks for the price list. When computing the list price Enterprise Pricer will match the quantity breaks. To match the quantity break, the sum of the product by UOM for the whole order is used.

An example of a price list broken down by high and low quantity is “Buy 1–50 of Product ID 10050 at a list price of USD 4.00 each. Buy 51–99 at list price of USD 3.00 each. Buy 100 or more at USD 2.00 each.”

Create a price list where the Product 10050 contains a different list price for 1–50 items, for 51–99 items, and for 100–99999 items.

Note. The quantity breaks for the same product/UOM should not overlap.

To set up the scenario on the Price List, complete these steps:

1. Add a new price list to the system.
 - On the Add a New Value Page of the Price List Page enter a SETID, Price List ID and Currency Code.
 - Click the Add button.
2. Type the Product ID 10050 in the *Add Product* field, and click the Add button.
3. On the Pricing Information tab, enter the UOM for the quantity break. Enter EA in this example.
4. Specify the Start and End Date for the price list.
5. Set the low quantity to 1 and the high quantity to 50.
6. Set the list price to 4.00 and click the Add a New Row button.

Note. The currency for the list price is determined by the currency specified when you first created the price list.

7. A second row appears with the same Product ID. Set the *UOM* to EA. Set the *Low Quantity* to 51 and the *High Quantity* to 99.
8. Set the list price to 3.00 and click the Add a New Row button.
9. A third row appears with the same Product ID. Set the *UOM* to EA. *Low Quantity* to 100 and the *High Quantity* to 999999999.
10. Set the list price to 2.00 and click the Add a New Row button.
11. Click Save.

To match the quantity break, the sum of the product by UOM for the whole order is used. For example, if the customer purchases 100 units on several different lines of the sales order, they will receive the units at the 2.00 per unit price.

Setting Up Price Lists

This section lists common elements and discusses how to:

- Set up price lists.
- Associate related objects with a price list.

See Also

Appendix A, “Enterprise Pricer Reports,” page 135

Common Elements Used in This Section

Status

Values are:

Active: Product prices on this list automatically supersede the product list price in transactions involving any related business objects.

Inactive: 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.

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	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.	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.	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.

Setting Up Price Lists

Access the Price List page.

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 grid.

Add

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

Note. You cannot add new products to price lists that are 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 appears only if an error exists. Correct the error as necessary. Position the mouse cursor on the red square box to view the error detail.
Pricing UOM (unit of measure)	The unit of measure for pricing the item. The pricing unit of measure can differ than the ordering unit of measure. This is common in certain industries such as paper where the customer orders in rolls but the items are priced in hundred count weight.
Start Date and End Date	Use to define the effective period (start and end date) for the list price entry. The start and end date on the transaction is evaluated against the date indicated on the arbitration plan.
Low Quantity and High Quantity	Use to specify the low and high quantity breaks for the price list. Note. In order to use the list price in the price list, the quantity of the products on the order must fall within the quantity break for the UOM. Also, if the <i>Use Quantity in Price List</i> option is not enabled for the application, the quantity break is ignored.
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: <i>Annually, Daily, Monthly, Quarterly, and Weekly.</i> 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.

Associating Related Objects with a Price List

Access the Related Objects page.

Price List		Related Objects	
Price List ID	Currency Code	SetID	
NEXT	USD	SHARE	
Description	Retail Price List	Status	Active
▼ Related Business Objects Find View All First ◀ 1 of 1 ▶ Last			
Transaction: Sales Order + -			
▼ Related Objects Customize Find First ◀ 1 of 1 ▶ Last			
Field Name	Identifier	Match these Values	
Sold To Customer ▼	1009	Tropical Outdoor Equipment + -	
▼ Related Price Rule Customize Find First ◀ 1-2 of 2 ▶ Last			
Rule	Description		
PM-0000000000000009	Promotions		+ -
PM-0000000000000011	Promotions		+ -

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. You can associate a price list to more than one transaction code.

Note. Related business objects are not 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.

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.

You can associate a price rule directly with the price list. The price rule conditions define the part of the transaction that must match before the price list is considered at pricing time.

Note. Price rules are used to define more complicated conditions. Business objects are used to define simpler, less complex conditions.

CHAPTER 6

Creating Price Rules

This chapter provides an overview of price rules and discusses how to:

- Set up price rules.
- Set up rounding rules.

Understanding Price Rules

This section discusses:

- Rounding rules.
- Pricing rules.
- Pricing formula examples.

Rounding Rules

Price rounding rules identify the number of decimal points to use based on the base price that is used in the pricing calculation. You can associate each price rule with a rounding rule or use the default rounding rule from the arbitration plan. You can also define whether each adjustment is rounded before it is applied, the net price is rounded after adjustments are applied, or both.

Use the Price Rounding Rules page to specify rounding rules. If rounding rules are not established, the system rounds according to how each application uses Enterprise Pricer. In PeopleSoft Order Management, for example, it is rounded to four decimal places, whereas PeopleSoft CRM rounds by currency.

Pricing Rules

A price rule defines the conditions that the transaction must meet for the adjustments to apply. The price rule consists 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 that take place when the pricing conditions are met.

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

Price Rule Conditions

You can enter the conditions for the price rule in either basic or advanced mode. Basic mode enables you to create price rules using the AND operator. Advanced mode enables you to create more complex conditions. You can use the OR operators well as the AND operator. Advanced mode enables you to enter the values for the price-by fields directly 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.

This is the process for entering 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. The price rule is available for use in the simulator, but not for price calculations.

Inactive: Price rule is not active. The rule is not available for any price calculations. Use to inactivate 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. To restrict the search further, enter additional search data in the fields at the top of the page. Click the Search button, select one or more values to apply to the rule condition, and click OK.

The condition appears in the Rule Definition group box. The rule definition based on the last condition that you built appears. Additions to the existing condition are made using the AND condition.

This is the process for entering 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 and is available for use in the simulator but not for price calculations.

Inactive: Price rule is not active. The rule is not available for any price calculations. Use to inactivate 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 can 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. To further restrict the search, enter additional search data at the top of the page and click the Search button. Select the fields to apply to the rule condition and click OK.

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

7. Select the rows in the Combined Conditions group box 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 group box.

To create more complex conditions, selecting the new rows in the Combined Conditions group box, select an operator, and click the Build Rule Definition button until you create the desired rule definition.

Note. The payment methods *Voucher*, *Debit Card*, and *Procurement Card* are not available in the order header payment method field, so price rules are not defined for those payment methods. The multiple payment method field (with those additional values) is available only at payment time.

Pricing Formula Scenarios

In Enterprise Pricer, you can create price rules that are as simple or as complex as you like. This section outlines various price rule scenarios and explains the price rule setup and execution for each scenario.

Discount/Surcharge Scenario

Create a price rule where Customer 1005 will receive a discount amount of EUR 10.00 dollars for purchasing between 1–10 units of product 10050. If 11–20 units is purchased, the customer will receive a 20.00 EUR 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 these steps:

1. Select Sales Orders as the transaction on the Rule Attributes group box of the Conditions page and enter a description.
2. Add Sold to Customer 1005 and Product ID 10050 to the Rule Conditions group box of the Conditions page.
3. In the Rule Attributes group box of the Formula page, select *Discount/Surcharge* as the Price Action Type, and *Cascading* in the Cascading/Summed field.
4. In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	Today's Date	December 31, 2005

Note. The ID is assigned by system but it is important because it is entered in the Price Formulas group box to select the date range.

5. In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	10
2	Quantity	11	20
3	Quantity	21	999999999999.9999

Note. The ID is assigned by system but it is important because it is entered in the Price Formulas group box to select the formula range.

6. In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Discount/Surcharge By	Amount /Percentage
1	1	EA	EUR	Amount	-10
1	2	EA	EUR	Amount	-20
1	3	EA	EUR	Percentage	-3

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

Product Add - Giveaway Scenario

You can give away products, discount products, create Buy-One-Get-One (BOGO) price rules and Buy-One-Get-One and Adjustment promotions.

Note. For online sales order processing, the product adds that are returned from Enterprise Pricer appear on a separate page. Choose which ones to add to the order. For batch processing, the product adds are inserted into the order automatically.

An example of a giveaway is “January 2005 Promotion - Buy 20–49 units of product A, get one product B free.”

To create a price rule that is valid through the end of the year where Customer 1005 receives a product giveaway of one Product ID 10049 per order for purchasing between 20–49 units of product 10050, complete these steps:

1. Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page and enter a description.
2. Add Sold to Customer 1005 and Product ID 10050 to the Rule Conditions group box of the Conditions page.
3. In the Rule Attributes group box of the Formula page, select *Product Add* as the Price Action Type and set the Rollup By field to *Line*.

Note. If set to rollup by line, 20–49 of product 10050’s must be on the same line to match the price rule. If set to rollup by order (the default), 20–49 of product 10050’s can be on different lines and they will still match the price rule.

4. In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	Today’s Date	December 31, 2005

Note. The ID is assigned by system but it is important because it is entered in the Price Formulas group box to select the date range.

5. In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	20	49

Note. The ID is assigned by system but it is important because it is entered in the Price Formulas group box to select the formula range.

6. In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Product Add By	Qty/BOGO Factor
1	1	EA		Quantity	1

Note. Currency is optional. If given, only transactions in the specified currency will match the price rule.

7. In Price Formula group box of the Formula Detail Page, specify the formula details:

Product ID	UOM Promo	Product Add Type
10049	EA	Per Order

Product Add - Discounted Giveaway Scenario

Discounted giveaways are price rules that involve promoting an item but not necessarily giving the product away. An example of a discounted giveaway is “January 2005 Promotion - Buy product A, get one product B free and three additional purchases of Product B at 50 percent off the list price (Limit one free per order).”

Create a price rule where, with purchase of Product ID 10050, Customer 1005 will receive one free item (Product ID 10049) and discount of 50 percent off of the list price for additional three units of product 10049 when the order is made between January 1, 2005 and January 31, 2005. This is valid for the entire month of January in 2005.

To set up the scenario on the price rule, complete these steps:

1. Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page and enter a description.
2. Add Sold to Customer 1005 and Product ID 10050 to the Rule Conditions group box of the Conditions page.
3. In the Rule Attributes group box of the Formula page, select *Product Add* as the Price Action Type.
4. In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range D	Pricing Date	Start Date	End Date
1	Order Date	January 1, 2005	January 31, 2005

5. In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	50

6. In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Product Add By	Quantity /BOGO Factor	Expression	Description
1	1	EA	GBP	Qty & Adj	3	LIST PRICE * 0.50)	Give three items at half price.
1	1	EA	GBP	Quantity	1		

7. In Price Formula group box of the Formula Detail Page, specify the formula details:

Formula ID	Product ID	UOM Promo	Product Add Type
1	10049	EA	Per Order
2	10049	EA	Per Order

Note. This example requires two formulas, one for the free product and one for the product receiving a 50 percent discount.

For online sales order processing, the product adds that are returned from Enterprise Pricer appear on a separate page. The CSR can then choose which ones to add to the order. For batch processing, the product Adds are inserted into the order automatically.

The *Product Add* Price Action Type controls how many products to add after selecting the formula (for example, 2 per line or 2 per order), whereas the Rollup By options control how the formula is selected (for example, using the quantity of each line or sum of all matching lines).

BOGO Scenario

You can specify the quantity of the giveaway with a BOGO factor.

An example of a BOGO is “Buy three of product A get one of product B free.”

Create a price rule where, for each purchase of three 10050 products, Customer 1005 will receive one free product (Product ID 10049) when the order is made between January 1, 2005 and January 31, 2005. This is valid for all of January 2005.

To set up the scenario on the price rule, complete these steps:

1. Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page and enter a description.
2. Add Sold to Customer 1005 and Product ID 10050 to the Rule Conditions group box of the Conditions page.
3. In the Rule Attributes group box of the Formula page, select *Product Add* as the Price Action Type and set the Rollup By field to *Transaction*.
4. In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	January 1, 2005	January 31, 2005

5. In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	999999999999.9999

6. In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Product Add By	Qty/BOGO Factor
1	1	EA	GBP	BOGO	3

7. On Price Formula group box of the Formula Detail Page, specify the formula details.

Product ID	UOM Promo
10049	EA

Note. For online sales order processing, the product adds that are returned from Enterprise Pricer appear on a separate page. The CSR can then choose which ones to add to the order. For batch processing, the product Adds are inserted into the order automatically.

The BOGO factor is used to calculate the product add quantity. The formula used is:

Total Quantity of Lines Matching Price Rule/BOGO Factor.

The resulting number derived from the calculation is truncated so that only the whole number is used.

For example, with a BOGO factor of three, when the customer buys two they get zero free. When they buy three, four, or five items, they get one free. When they buy six, seven, or eight items, they get two free items, and so on.

Min/Max Target Price Rule Scenario

Occasionally products have numerous applicable price rules but business needs require you to dictate that the price for certain products falls within a specific range. When an item is associated with a minimum/maximum target price rule the product's adjustments will not exceed the minimum/maximum price established for that product.

An example of a minimum/maximum target price rule is “Unit price of item 10050 between USD 122.50 and USD 144.50.”

Note. This type of rule is also often referred to as an Adjustment Cap type of rule. In the addition to cap the adjustment by price, you can also cap the adjustments by amount or percentage.

For this scenario we will create a price rule for Product ID 10050, that ensures a target price of USD 122.50 to 144.50 for the entire month of January 2005:

1. Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page and enter a description.
2. Add Product ID 10050 to the Rule Conditions group box of the Conditions page.
3. In the Rule Attributes group box of the Formula page, select *Min/Max Target Price* as the Price Action Type and set the Rollup By field to *Transaction*.
4. In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	January 1, 2005	January 31, 2005

5. In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	999999999999.9999

6. In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Target Price By	Minimum Price	Maximum Price
1	1	EA	USD	Price	122.50	144.50

Note. After all other adjustments are applied, if the minimum/maximum target price is exceeded, an additional adjustment is applied so that the product's price will fall in the minimum and maximum price specified in the formula.

Minimum/Maximum Margin Scenario

In addition to automatically adjusting the adjustments to ensure the net price falls within a specified range, Enterprise Pricer can also perform margin checks to flag any transaction line when the product's margin falls outside the established minimum/maximum margins. Each transaction then decides how to respond to handle these transaction lines. In the case of Sales Orders, the schedule is put on "Margin Rule Hold."

The margin is calculated in this manner:

Margin = Net Price – Product Cost

Margin Percentage = (Net Price – Product Cost)/Net Price *100

If Net Price = 0, the Margin Percentage is 0.

In order to calculate the margin, the transaction will pass the product cost even when Cost Plus Pricing is not used.

An example of a minimum/maximum margin price rule is "Margin for item 10050 between 18.5 percent and 44 percent."

For this scenario we create a price rule for Product ID 10050 that ensures a target margin of no less than 18.5 percent and no more than 44 percent is in place for all orders generated during January 2005:

1. Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page and enter a description.
2. Add Product ID 10050 to the Rule Conditions group box of the Conditions page.
3. In the Rule Attributes group box of the Formula page, select *Min/Max Margin* as the *Price Action Type* and set the Rollup By field to *Transaction*.
4. In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	January 1, 2005	January 31, 2005

5. In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	999999999999.9999

6. On the Price Formulas group box of the Formula page, specify the formula definition.

Date Range IDs	Formula Range IDs	Unit of Measure	Currency	Margin By	Minimum Price	Maximum Price
1	1	EA	USD	Percent	18.5	44

Note. When calculating the margin you can also use alternate product, instead of product cost, by selecting Alternate Cost as Margin Base on the formula.

Tiered Price Rule Scenario

Tiered price rules indicate to Enterprise Pricer the potential need to break a given transaction line into multiple pricing schedules. This gives the customer control over exactly the discount given by quantity ranges. Enterprise Pricer will perform the tiered calculation and create pricing schedules to pass back the quantity and net price for each quantity, along with the matching formula.

Note. Tiered pricing is only available for discount/surcharge and price override price rules. The formula breaks are based on quantity or price and should not overlap. If there is a gap in the formula breaks, the gap is treated as no adjustment applied. During the pricing process, when sorting the price rules, the overall adjustment for the schedule is calculated to compare the tiered rule with other price rules.

An example of a tiered price rule is “Buy 25 or of Product A. The first 25 are priced at USD 15 each, the remaining units are priced at USD 12 each.”

Create a tiered price rule for Product ID 10050 that ensures that if 50 units of Product ID 10050 are purchased on a single line of a sales order then 25 units are priced at USD 15 per item and 25 units are priced at USD 12 per item, for all orders generated during January 2005.

To set up the scenario on the price rule, complete these steps:

1. Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page and enter a description.
2. Add Product ID 10050 to the Rule Conditions group box of the Conditions page.
3. In the Rule Attributes group box of the Formula page, select *Price Override* as the *Price Action Type* and set the Rollup By field to *Line*.
4. Select the Tiered Pricing check box and specify a tiered increment of 1.
5. In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	January 1, 2005	January 31, 2005

6. In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	25
2	Quantity	26	999999999999

7. In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Price Override By	Price
1	1	EA	USD	Price	15
1	2	EA	USD	Price	12

One-Time Only Price Rule Scenario

Enterprise Pricer supports the creation of price rules that are identified as one-time only, per price rule or per customer. When the one-time only price rule is determined to apply to the order, it can apply to multiple order lines/schedules in the same order.

An example of a one-time only price rule is “Customer 1005 Spend USD 1000 or more on an order, receive 10 percent off an order if you book it during the month of February 2005. This discount is offered to the customer only on the first order.”

To set up the scenario on the price rule, complete these steps:

1. Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page. Enter a Description.
2. Add Sold To Customer and Customer ID 1005 to the Rule Conditions group box of the Conditions page.
3. In the Rule Attributes group box of the Formula page, select *Discount/Surcharge* as the Price Action Type, set the Rollup By field to *Transaction*, and set the One Time Only field to *Per Customer*.
4. In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	February 1, 2005	February 28, 2005

5. In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Price	1000	9999999999.9999

6. In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Price Override By	Price
1	1	EA	EUR	Percentage	-5

Mutually Exclusive Price Rule Scenario

Mutually exclusive price rules are used for discounts that are “so good” no other discounts are allowed in conjunction with them. A mutually exclusive arbitration type enables you to create or modify arbitration plans to sort mutually exclusive rules appropriately.

An example of a mutually exclusive price rule is “Customer 1005: spend USD 1000, and buy 200 or more of product A get 50 percent off the order. Not combined with other discounts.”

Create a price rule where the Customer 1005 receives one transaction during February 2005 that is discounted by 50 percent. The rule is valid only one time during the month of February.

To set up the scenario on the price rule, complete these steps:

1. Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page and enter a description.
2. Add Sold To Customer and Customer ID 1005, and add Product ID 10050 to the Rule Conditions group box of the Conditions page.
3. In the Rule Attributes group box of the Formula page, select *Discount/Surcharge* as the Price Action Type, set the Rollup By field to *Transaction*, select the Mutually Exclusive check box, and set the One Time Only field to *Per Customer*.
4. In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	February 1, 2005	February 28, 2005

5. In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Price	1000	999999999.9999
2	Quantity	200	999999999.9999

6. In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Price Override By	Price
1	1,2	EA	EUR	Percentage	-50

Compound Date Breaks Within a Price Rule Scenario

The previous scenarios provided examples of matching a single date for applying price formulas. It is also possible to create price rules where multiple dates must match for the price formula to apply.

An example of price rule with multiple date breaks is “Customer 1005: Order USD 1000 worth of product 10050 and book the order in February 2005 with a scheduled ship date in February 2005 save 5 percent off the order.”

Create a price rule where the Customer 1005 buys USD 1000 of Product 10050 with an order date in February 2005 and a ship date in February 2005 and receives a 5 percent discount off their order total.

To set up the scenario on the price rule, complete these steps:

1. Add *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page. Enter a Description.
2. Add Sold To Customer and Customer ID 1005, and add Product ID 10050 to the Rule Conditions group box of the Conditions page.
3. In the Rule Attributes group box of the Formula page, select *Total Order Discount/Surcharge* as the Price Action Type.
The Rollup By field is automatically set to *Transaction*.
4. In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	February 1, 2005	February 28, 2005
2	Schedule Ship Date	February 1, 2005	February 28, 2005

5. In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Price	1000	9999999999.9999

6. In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Price Override By	Price
1,2	1	EA	EUR	Percentage	-5

Compound Pricing Formula Scenario

There are four values for compound formulas: quantity, amount, weight, and volume. During the pricing process, a price rule with compound formula breaks will match the Price Type node in the arbitration plan if one of the values of the compound break matches that of the price type. For example, if the price rule is by quantity and amount, it will match both the Quantity and Extended Price type nodes in the arbitration plans.

Note. Not all four compound formula types are valid for each transaction. The application and transaction setup determines the types of compound formulas are valid. For example, only quantity and amount are used for sales order lines, and weight and volume are valid for load pricing.

An example of a compound price rule is “Apply a 10 percent discount if the total order is USD 50,000 or more and the total order quantity is a quantity of 500 or more. Both conditions must be met to give the 10 percent discount.”

Note. Compound Pricing Formula rules are not allowed for tiered and period-to-date price rules because the price rules use the accumulated quantity or amount across the order to find the formula.

To set up the scenario on the price rule, complete these steps:

1. Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page. Enter a Description.
2. Add Sold To Customer and Customer ID 1005 to the Rule Conditions group box of the Conditions page.
3. In the Rule Attributes group box of the Formula page, select *Discount/Surcharge* as the Price Action Type.
Set the Rollup By field to *Transaction*.
Set the Cascading/Summed field to *Summed*.
4. In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	February 1, 2005	February 28, 2005

5. In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Price	50,000	999999999.9999
2	Quantity	500	999999999

6. In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Price Override By	Price
1	1,2	EA	EUR	Percentage	-10

Rollup Options Within a Price Rule Scenario

Enterprise Pricer enables you to indicate how quantities are combined for quantity price breaks using the Rollup By option at the price rule level.

The rollup rule options are:

- Transaction

Rollup is by transaction, from all order schedules that match the same price rule.

- Line

Rollup is by order line.

- Schedule

Rollup is by order schedule.

- Rollup Rule

This indicates that rollup is controlled by a Rollup Rule.

Suppose this price rule is created:

Price Rule: Sinks

Price Action Type: Discount/Surcharge

Condition: Product = Sinks

Formulas:

Formula #	Min and Max Quantity	Discount
1	1–10	–5 percent
2	11–20	–10 percent
3	21–30	–15 percent
4	31–99	–20 percent

The sales order contains:

Line	Schedule	Quantity	Product
1	1	5	Sinks
1	2	7	Sinks
2	1	15	Sinks
2	2	8	Sinks

If the Rollup By option on the order is set to:

- Transaction (or the Rollup By option is blank), the order is processed as outlined in the table:

Line	Schedule	Quantity	Product	Rollup Quantity	Formula	Adjustment
1	1	5	Sinks	35	4	–20 percent
1	2	7	Sinks	35	4	–20 percent
2	1	15	Sinks	35	4	–20 percent
2	2	8	Sinks	35	4	–20 percent

- Line, the order is processed as outlined in the table:

Line	Schedule	Quantity	Product	Rollup Quantity	Formula	Adjustment
1	1	5	Sinks	12	2	–10 percent
1	2	7	Sinks	12	2	–10 percent
2	1	15	Sinks	23	3	–15 percent
2	2	8	Sinks	23	3	–15 percent

- Schedule, the order is processed as outlined in the table:

Line	Schedule	Quantity	Product	Rollup Quantity	Formula	Adjustment
1	1	5	Sinks	5	1	–5 percent
1	2	7	Sinks	7	1	–5 percent
2	1	15	Sinks	15	2	–10 percent
2	2	8	Sinks	8	1	–5 percent

Simple Rollup Price Rule Scenario

A Rollup price rule is used to roll up the quantities or amounts. The rollup is then used by a different price rule to match the formula break for adjustment consideration. Because the rollup rule is intended to group products for formula consideration, the rollup rule is always by transaction.

You create several rules for the various types of bathroom fixtures.

- You have one rule that is a rollup rule which applies to all products that belong to the product group called Bathroom Fixtures.

This rule is used to rollup the total quantities and is called Fixtures.

- You have one rule that provides a discount on shower stalls called Showers.
- You have one rule that provides a discount on bathtubs called Tubs.
- You have one rule that provides a discount on sinks called Sinks.

To set up the scenario, you must create all four price rules:

1. Create the rollup rule for all items belonging to the Bathroom Fixtures product group (Group FIX).
 - Select *Sales Orders* as the Transaction on the Rule Attributes group box of the Conditions page.
In the Description field, enter *Fixtures*.
 - Add Product Group to the Rule Conditions group box of the Conditions page, and select the product group called FIX.
 - In the Rule Attributes group box of the Formula page, select *Rollup Only Rule* as the Price Action Type.
Set the Rollup Exclude field to *None*.
2. For the rule that applies to products belonging to the Shower Stalls product group (Group STALL):
 - Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page.
In the Description field, enter *Showers*.
 - Add Product Group to the Rule Conditions group box of the Conditions page, and set the group ID to STALL.
 - In the Rule Attributes group box of the Formula page, select *Discount/Surcharge* as the Price Action Type.
Set the Rollup By field to *Rollup Rule*, and select the Fixtures rollup rule.
Set the Cascading/Summed field to *Summed*.
 - In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	February 1, 2005	December 31, 2005

- In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	10
2	Quantity	11	20
3	Quantity	21	99

- In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Price Override By	Price
1	1	EA		Percentage	-2
1	2	EA		Percentage	-5
1	3	EA		Percentage	-8

3. For the rule that applies to products belonging to the bathtubs product group (Group TUBS):

- Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page.
In the Description field, enter *Tubs*.
- Add Product Group to the Rule Conditions group box of the Conditions page, and set the group ID to TUBS.
- On the Rule Attributes group box of the Formula page, select *Discount/Surcharge* as the Price Action Type.
Set the Rollup By field to *Rollup Rule*, and select the Fixtures rollup rule.
Set the Cascading/Summed field to *Summed*.
- In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	February 1, 2005	December 31, 2005

- In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	10
2	Quantity	11	20
3	Quantity	21	99

- In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Price Override By	Price
1	1	EA		Percentage	-1
1	2	EA		Percentage	-6
1	3	EA		Percentage	-10

4. For the rule that applies to products belonging to the sinks product group (Group SNKS):

- Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page.

In the Description field, enter *Sinks*.

- Add Product Group to the Rule Conditions group box of the Conditions page, and set the group ID to SNKS.

- In the Rule Attributes group box of the Formula page, select *Discount/Surcharge* as the Price Action Type.

Set the Rollup By field to *Rollup Rule*, and select the Fixtures rollup rule.

Set the Cascading/Summed field to *Summed*.

- In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	February 1, 2005	December 31, 2005

- In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	10
2	Quantity	11	20
3	Quantity	21	99

- In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Price Override By	Price
1	1	EA		Percentage	-5
1	2	EA		Percentage	-10
1	3	EA		Percentage	-20

A sales order comes in that has these order lines attached to it:

Order Line	Order Qty	Product	Product Group(s)
1	10	Kohler sink, std	SNKS, FIX
2	10	Smithson shower stall, std	STALL, FIX
3	5	Delta tub, std	TUBS, FIX

During order processing the price rule Fixtures is used to roll up the total quantities. In this case, all order lines match. The total quantity ordered is 25.

- Order line one matches the Sinks price rule.

Because the Sinks rule uses Fixture as a rollup rule, the formula matched is the formula with the minimum amount set to 21 and a maximum of 99 is matched and a 20 percent discount is applied.

- Order line number two matches the Showers price rule.

Because the Showers rule uses Fixture as a rollup rule, the formula matched is the formula with a minimum amount of 21 and a maximum amount of 99 and an 8 percent discount is applied.

- Order line number three matches the Tubs price rule.

Because the Tubs rule uses Fixture as a rollup rule, the formula matched is the formula with a minimum amount of 21 and a maximum amount of 99 and a 10 percent discount is applied.

Complex Rollup Price Rule Scenario

Using the Rollup Rule to roll up the transaction, it is possible to create multiple baskets in the order. For example, in addition to the rules described in the previous section, we have Fridges and Stoves belonging to a product group called Kitchen, and Towels belonging to both product groups Bathroom Fixtures and Kitchen.

You create several additional rules for the various kitchen-related items.

- You have one rule that is a rollup rule which applies to all kitchen products and is called Kitchen.
- You have one rule that provides a discount on towels called Towels.
- You have one rule that provides a discount on refrigerators called Refrigerators.
- You have one rule that provides a discount on stoves called Stoves.

To set up the scenario you must create all four price rules:

1. First create the rollup rule for all items belonging to the Kitchen product group (Group KITC).
 - Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page.
In the Description field, enter *Kitchen*.
 - Add Product Group to the Rule Conditions group box of the Conditions page, and select the product group called KITC.
 - In the Rule Attributes group box of the Formula page, select *Rollup Only Rule* as the Price Action Type.
Set the Rollup By field to *Rollup Rule*.
Set the Rollup Exclude field to *None*.
2. For the rule that provides a discount to products belonging to the towels product group (Group TOWL):

- Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page.
In the Description field, enter *Towels*.

Note. The towel fixtures belong to both the KITC product group and the FIX product group. But the rollup rule specified for the Towels price rule is the Fixtures rollup rule.

- Add Product Group to the Rule Conditions group box of the Conditions page, and set the group ID to TOWL.
- In the Rule Attributes group box of the Formula page, select *Discount/Surcharge* as the Price Action Type.

Set the Rollup By field to *Rollup Rule*, and select the FIX rollup rule.

Set the Cascading/Summed field to *Summed*.

- In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	February 1, 2005	December 31, 2005

- In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	30
2	Quantity	31	50
3	Quantity	51	99

- In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Price Override By	Price
1	1	EA		Percentage	-5
1	2	EA		Percentage	-10
1	3	EA		Percentage	-20

- For the rule that provides a discount to products belonging to the refrigerator product group (Group FRDG):
 - Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page.
In the Description field, enter *Refrigerators*.
 - Add Product Group to the Rule Conditions group box of the Conditions page, and set the group ID to FRDG.

- In the Rule Attributes group box of the Formula page, select *Discount/Surcharge* as the Price Action Type.

Set the Rollup By field to *Rollup Rule*, and select the KITC rollup rule.

Set the Cascading/Summed field to *Summed*.

- In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	February 1, 2005	December 31, 2005

- In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	10
2	Quantity	11	20
3	Quantity	21	99

- In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Price Override By	Price
1	1	EA		Percentage	-2
1	2	EA		Percentage	-3
1	3	EA		Percentage	-4

4. For the rule that provides a discount to products belonging to the stoves product group (Group STOV):

- Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page.

In the Description field, enter *Stoves*.

- Add Product Group to the Rule Conditions group box of the Conditions page, and set the group ID to STOV.

- In the Rule Attributes group box of the Formula page, select *Discount/Surcharge* as the Price Action Type.

Set the Rollup By field to *Rollup Rule*, and select the KITC rollup rule.

Set the Cascading/Summed field to *Summed*.

- In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	February 1, 2005	December 31, 2005

- In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	15
2	Quantity	16	30
3	Quantity	31	99

- In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Price Override By	Price
1	1	EA		Percentage	-5
1	2	EA		Percentage	-7
1	3	EA		Percentage	-9

The initial sales order had three order lines:

Order Line	Order Qty	Product	Product Group(s)
1	10	Kohler sink, std	SNKS, FIX
2	10	Smithson shower stall, std	STALL, FIX
3	5	Delta tub, std	TUBS, FIX

Three additional lines are added to the sales order:

Order Line	Order Qty	Product	Product Group(s)
4	20	LQ Towel Rack, small	KITC, FIX
5	10	GE refrigerator model 224	FIX, KITC
6	5	Maytag stove model 4492	FIX, KITC

In this case, each of the two rollup rules has a basket.

- The rollup price rule *Fixtures* has a basket of 45 (the sum of the order quantities in order lines 1, 2, 3, and 4) and is used by price rules *Showers*, *Tubs*, and *Towels*. These discounts are applied:
 - Order line number one, Kohler sink, is discounted by 20 percent.
 - Order line number two, Smithson shower stall, is discounted by 8 percent.
 - Order line number three, Delta tub, is discounted by 10 percent.
 - Order line number four, LQ Towel Rack, is discounted by 10 percent.
- Rollup price rule *Kitchen* has a basket of 35 (order lines 4, 5, and 6) and is used by price rules *Refrigerators* and *Stoves*. These discounts are applied:

- Order line number five, GE refrigerator model 224, is discounted by 4 percent.
- Order line number six, Maytag stove model 4492, is discounted by 9 percent.

Note. Order line #4 which includes the towel rack item is included in the Kitchen basket. The *Kitchen* rollup rule is not used by the towels because the *Towels* rule specifies the *Fixtures* rule as the rollup rule.

Maximum Quantity and Maximum UOM for Price Rule

On any given price you can specify the maximum quantity to which the price rule can apply. For example you might want to promote a new product at a discount price, but want to limit the quantity of products in the discount program.

For example, a manufacturer has approached you asking you to carry a new line of product. You agree to sell the product on a “trial” basis to gauge the potential demand from the customer base. The manufacturer agrees to provide you with a specified quantity of the product, 10,000 units, at a special price, 25 USD. You in turn agree to pass the special price on to the customer. You set up a price rule for this product at the special price with a maximum quantity defined. Once the maximum is reached, the price rule is discontinued or expired and further sales of the product follow the normal pricing rules.

To set up the scenario you must create a price rule identifying the new product group (1234) and specifying the maximum quantity that is purchased at the discounted amount:

1. Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page.
In the Description field, enter *Product Intro*.
2. Add Product Group ID to the Rule Conditions group box of the Conditions page, and set the Group ID to 1234.
3. In the Rule Attributes group box of the Formula page, select *Price Override* as the Price Action Type.
Set the Rollup By field to *Transaction*.
Set the Cascading/Summed field to *Summed*.
4. The manufacturer has agreed to give you 10,000 units of the items in this product group.
In the Maximum Quantity field enter *10000*.
In the UOM field enter *EA*.
5. In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	February 1, 2005	December 31, 2005

6. In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	9999999

7. In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Price Override By	Price
1	1	EA	USD	Price	25.00

All sales order transactions based in USD which include items belonging to the group ID 1234 are priced at 25 USD until 10,000 are sold.

Pricing with a Different Base

Enterprise Pricer provides you the ability to specify a base other than list price, for price rule calculations. The system supports these sources as the base.

- List Price (default).
- Cost.
- Buying Agreement.
- Alternate Cost.

If the order line is associated with a buying agreement, the base is always buying agreement.

If the user has set up specific rules (Pricing Base price rules) to indicate that pricing base is based on certain conditions, the order's arbitration plan is used to filter and sort the matching rule to determine the base. The arbitration plan should have a node with price rule type of Pricing Base, at the top-level node in the tree. You can use one of these decisions to select the pricing base:

- Use Highest Base.
Compare list price and cost and use the larger of them as the pricing base.
- Use Lowest Base.
Compare list price and cost and use the smaller of them as the pricing base.
- Use Cost As Base.
- Use List Price As Base.
- Use Alternate Cost As Base.

After determining the base, the other matching price rules are processed and the selected base is used for all the pricing calculations.

If the order line is not associated with a buying agreement and is not cost-based, the list price is used.

Note. There are four applicable options on the price rule; Applicable to List Price, Applicable to Buying Agreement, Applicable to Cost Base, Applicable to Alter Cost Base. After determining the pricing base, only price rules with the matching applicable option selected are applied. For example, if the base is Cost, only the price rules with the Applicable to Cost Base option selected are applied. For price rules with the option Applicable to Alter Cost Base selected, it is important to note that the alternate cost is another cost value. For Order Management, alternate cost is the product cost with a factor applied to it.

Determining Net Price Using Mathematical Expressions

Enterprise Pricer enables you to create mathematical expressions in the price rule that are used to calculate the net price for a given product. Suppose you want to give a 5 percent discount plus a 5 USD discount to all orders of product 10050 during the ordering period February 1, 2005 to December 31, 2005.

To set up the scenario you must create a price rule identifying the mathematical expression you want to use to determine the net price for the product:

1. Select *Sales Orders* as the Transaction in the Rule Attributes group box of the Conditions page.
In the Description field, enter *Math Expr*.
2. Add Product ID to the Rule Conditions group box of the Conditions page, and set the Product ID to 10050.
3. In the Rule Attributes group box of the Formula page, select *Price Override* as the Price Action Type.
Set the Rollup By field to *Transaction*.
Set the Cascading/Summed field to *Summed*.
4. In the Date Range group box of the Formula page, enter the date range during which this price rule applies:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	February 1, 2005	December 31, 2005

5. In the Formula Range group box of the Formula page, enter the formula price and quantity information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	9999999

6. In the Price Formulas group box of the Formula page, specify the formula definition:

Date Range ID	Formula Range ID	Unit of Measure	Currency	Price Override By	Expression
1	1	EA		Expression	LIST_PRICE * 0.95 - 5

When product 10050 appears on a sales order with an order date of February 1, 2005 to December 31, 2005, Enterprise Pricer uses the value passed and evaluates the expression to calculate the net price for item 10050 and return it to Sales Order.

Note. When you have a Price Action Type of *Discount/Surcharge* or *Price Override*, if you select *Price Override By Amount and Expression*, *Percentage and Expression*, or *Price and Expression*, Enterprise Pricer will perform two calculations and choose either the larger or the smaller net price depending on how you set the Smaller/Larger field. If you select the *Smaller* option, the smaller net price is chosen by Enterprise Pricer. If you select the *Larger* option, the larger net price is chosen by Enterprise Pricer. For example, the product's list price is 100 USD. The formula is specified as Amt & Expr and Smaller is selected. The discount amount is -10 and the expression is "LIST_PRICE * 0.95." Discount by -10 results in a net price of 90. The expression is evaluated as $100 * 0.95 = 95$. Because 90 is smaller than 95, a discount of -10 is applied for a net price of 90.

Valid Pricing Combinations

The Adjustment Flag values and labels for the Adjustment Flag, Numeric Value, Text Value, Minimum Amount, and Maximum Amount fields depend on the price action type of the price rule and appear in the table. If a listed field is not applicable to the specified price action type, the table cell is blank.

Price Action Type	Adjustment Flag Values	Adjustment Label	Numeric Value Label	Text Value Label	Minimum Amount Label	Maximum Amount Label
Discount / Surcharge	• Amount • Percentage • External Class • mathematical Expression • Amount and mathematical Expression • Percentage and mathematical Expression	Discount / Surcharge By	Amount / Percentage	Class / Expression		
Price Override	• Price • External Class • Math Expression • Price and mathematical Expression	Price Override By	Price	Class / Expression		
Product Add	• Quantity • BOGO • Quantity with Adjustment • BOGO with Adjustment • Quantity Expression	Product Add By	Quantity / BOGO Factor	Expression		

Price Action Type	Adjustment Flag Values	Adjustment Label	Numeric Value Label	Text Value Label	Minimum Amount Label	Maximum Amount Label
Total Order Discount / Surcharge	- Amount - Percentage - External Class - mathematical Expression - Amount and mathematical Expression - Percentage and mathematical Expression	Discount / Surcharge	Amount / Percentage	Class / Expression		
Minimum / Maximum Target Price	Price	Target Price			Minimum Price	Maximum Price
Minimum / Maximum Target Discount	- Amount - Percentage	Target Discount By			Minimum Amount / Percentage	Maximum Amount / Percentage
Minimum / Maximum Target Surcharge	- Amount - Percentage	Target Surcharge By			Minimum Amount / Percentage	Maximum Amount / Percentage
Related Business Objects						
Price List Only Condition						
Rollup Only Rule						
Minimum / Maximum Margin	- Amount - Percentage	Margin By			Minimum Amount / Percentage	Maximum Amount / Percentage
Pricing Base						
Standard Discount						

This table lists the values in the Adjustment Flag field and the options that are hidden for each value:

Adjustment Flag	Numeric Value	Text Value	Minimum Amount	Maximum Amount	Market Rate Index	Small or Large
Amount	Not used for Minimum / Maximum Rules		Not used if not Minimum / Maximum Rules	Not used if not Minimum / Maximum Rules		
Percentage	Not used for Minimum / Maximum Rules		Not used if not Minimum / Maximum Rules	Not used if not Minimum / Maximum Rules		
Price	Not used for Minimum / Maximum Rules		Not used if not Minimum / Maximum Rules	Not used if not Minimum / Maximum Rules		
External Class		Yes				
mathematical Expression		Yes			Yes	
Quantity	Yes					
BOGO Factor	Yes					
Quantity with Adjustment	Yes	Yes				
BOGO with Adjustment	Yes	Yes				
Quantity Expression		Yes				
Amount and mathematical Expression	Yes	Yes			Yes	Yes
Percentage and mathematical Expression	Yes	Yes			Yes	Yes
Price and mathematical Expression	Yes	Yes			Yes	Yes

Setting Up Price Rules

This section discusses how to:

- Set up price rule conditions.

- Set up price rule formulas.
- Validate mathematical expressions.
- Review price rule usage.

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	Set up pricing rule conditions for each transaction.
Formulas	EOEP_FORMULA	Pricing Configuration, Create Pricing Information, Price Rules Maintenance	Set up price rule formulas (the actions that take place when the price rule conditions are met).
Search	EOEP_SEARCH_PAGE	Click the Search 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	Enter values for promotions. This page is available only if PeopleSoft Promotions Management is not installed.
Expression Validator	EOEP_MATH_EXPR_VAL	Enter an expression for the price formula. Click the Calculator button next to the Expression field.	Validate the expression for the formula.
Sales Order Price Rule Usage	OM_SORULE_USAGE	Click the Price Rule Usage button on the Conditions page.	Review price rule usage information.

Setting Up Price Rule Conditions

Access the Conditions page.

Conditions		Formulas	
Transaction	Price Rule	Description	SetID
Sales Order	NEXT	PROMOTIONS	SHARE
Mode: Advanced		Change to Basic mode	Price Rule Usage Save Price Rule As...
▼ Rule Attributes			
*Status:	Pending		
Description:	President's Day Sale		
*Description:	PROMOTIONS		
▼ Rule Conditions			
Customize Find First 1-2 of 2 Last			
Field Name	Identifier		Match these Values
Product ID	10000,10002,10003		Men's Long Sleeve Bike Jersey Long Sleeve T-Shirt, Men's Women's Long Sleeve Bike Shirt
Sold To Customer	CAN99		Canada Operations Interunit Customer

Conditions page (1 of 2)

Combined Conditions	
And/Or:	Build Rule Definition
Rule Definition	
The transaction contains the following: Sold To Customer is equal to any in the list Canada Operations Interunit Customer AND Product ID is equal to any in the list Men's Long Sleeve Bike Jersey Long Sleeve T-Shirt, Men's Women's Long Sleeve Bike Shirt	

Conditions page (2 of 2)

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 are combined into more complex conditions. You can use logical AND and OR operators.

This is the default mode.

Note. Rule conditions in advanced mode are not automatically AND'd together. If you do not specifically choose to AND two conditions the system will match the last entered condition.

Change to Advanced mode
and **Change to Basic mode**

Use to change the mode.

Save Price Rule As

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

Price Rule Usage

Click to view usage information.

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, you cannot change the transaction.

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 inactivate 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. Position the mouse cursor on top of the red square to view a detailed description of the error.

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 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	Click 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. 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 and select an operator and click the Build Rule Definition button. . 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	Select either operator to combine the selected conditions. This is available if you are using advanced mode.
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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 group box.
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Rule Definition

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

Setting Up Price Rule Formulas

Access the Formulas page.

Conditions		Formulas	
Transaction	Price Rule	Description	SetID
Sales Order	PR-000000000000000001	PROMOTIONS	SHARE
Mode: Advanced		Change to Basic mode	Price Rule Usage Save Price Rule As...
▼ Rule Attributes			
Price Action Type: Product Add			
*Period-to-Date:	No	☐ Use Grace Days	
One-Time Only:	No	☐ Exclusive Pricing Only	
Rollup Exclude:	None	☐ Stop Processing Here	
Rollup By:	Transaction	☐ Rollup By UOM	☐ Mutually Exclusive
Maximum Quantity:		UOM:	☒ Applicable to List Price
			☐ Applicable to Buying Agreement
			☐ Applicable to Cost Base
			☐ Applicable to Alter Cost Base
▼ Date Range			
ID	*Pricing Date	*Start Date	*End Date
1	Order Date	03/31/2005	03/31/2005
▼ Formula Range			
ID	*Price Type	Minimum Amount	Maximum Amount
1	Quantity	1.0000	9999999999999.9999

Formulas page (1 of 2)

Price Formulas						
Formula Definition Formula Detail Terms and Adjustment type Break Description						
Date Range IDs	Formula Range IDs	UOM	Currency	Product Add By	Quantity / BOGO Factor	
1	1	EA		BOGO	1.0000	
▼ Account Distribution Codes						
Business Unit	Adjustment Type	Discount Distribution Code	Discount Dist Percentage	Surcharge Distribution Code	Surcharge Dist Percentage	
▼ Price List						
Price List ID	Currency Code	Description				

Formulas page (2 of 2)

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

See [Chapter 3, “Implementing Enterprise Pricer,” Setting Up Transaction Code Options, page 22.](#)

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. You must create at least one date range and formula range. Date range IDs and formula range IDs on each formula must point to a valid date and formula range.

To apply the formula, the transaction must match all the date ranges identified by date range IDs and all of the formula ranges identified by formula range IDs. For example, date range ID(s) 1,2,3 means the formula must match date range conditions 1, AND 2, AND 3. The same is true for formula ranges: to apply the formula, the transaction must match all of the formula ranges identified by formula range IDs. For example, formula range ID(s) 1,2,3 means the formula must match formula range conditions 1, AND 2, AND 3. To see a text description of the rule formula, click the Break Description tab.

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.

Min/Max Margin: Perform a margin check. If a line falls outside one of the minimum/maximum margin rules Enterprise Pricer will return the match to the transaction. Each transaction will take proper action. For order management, the schedule is put on hold. The margin is calculated in this manner:

Margin = Net Price – Product Cost

Margin Percentage = (Net Price – Product Cost)/Net Price *100

If Net Price = 0, the Margin Percentage is 0.

In order to calculate the margin, Transaction Pricer passes the Product Cost even when Cost Plus Pricing is not used.

Note. If indicated at the formula level by Margin Base field, Alternate Cost is used in place of Product Cost to calculate the margin.

Min/Max Target Discount (minimum/maximum target discount): Compare the discount adjustment and apply a target adjustment so the overall discount falls in the minimum and maximum target discount range.

Min/Max Target Price (minimum/maximum target price): Compare the net price and apply an adjustment to bring the price within the minimum and maximum prices specified.

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 as 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 as 5 percent, the system always applies a 5 percent surcharge. If you define a minimum target price for a product as 50 USD, the system applies adjustments to the base price, but does not discount the price below 50 USD.

Min/Max Target Surcharge (minimum/maximum target surcharge): Compare the surcharge adjustment and apply the adjustment such that the surcharge falls within the minimum and maximum target surcharge specified.

Price List Only Condition: Create a condition only price rule to select the price lists.

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.

Pricing Base: Specify a pricing base for transaction lines that match this rule. The pricing base type is specified by the Pricing Base field.

Product Add: Add additional products field or at a specified price.

Note. Product adds were previously referred to as giveaways. For giveaway products, you can use the product's list price to calculate the net price.

Rollup Only Rule: Create rollups that are independent of conditions of the adjustment (for example, Discount/Surcharge) price rule to select adjustment formulas.

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

Pricing Base

Select the base or the starting point for the pricing calculation.

Alternate Cost: The alternate cost of the product is used as the base for pricing calculations. Alternate cost is a different cost than product cost. For example, in PeopleSoft Order Management, the alternate cost is the product cost with an Alternate Cost Adjustment Factor applied to it.

Cost: The product cost is used as the base for pricing calculations.

List Price: The product list price is used as the base for pricing calculations.

Cascading/Summed

Select the method for applying the adjustment for the *Discount/Surcharge* and *Product Add* price action types.

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 off the list price of 100 USD, the system applies the discounts in this 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. The summed adjustments are applied to the net price with cascading adjustments already applied.

Period-to-Date

Select to include period-to-date totals in the adjustment. The system applies 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.

One-Time Only	Select to limit the rule applicability. Typically used for price discounts that are so good they are not allowed on multiple orders. Effective for encouraging large first orders instead of many smaller orders. <i>Per Customer:</i> Rule is used one time per customer. <i>Per Rule:</i> Rule is used one time.
Rollup Exclude	Indicate whether to include KVI or NDP products in the total to select formulas. <i>KVI & NDP Products:</i> KVI (Known Value Items) and NDP (Non-Discountable Products) are not included. <i>KVI Products:</i> KVI (Known Value Items) are not included. <i>NDP Products:</i> NDP (Non-Discountable Products) are not included. <i>None:</i> All products are included.
Rollup By	Identify the manner in which rollup (totals to select price formulas) is calculated. The options are: <i>Line:</i> Rollup is calculated by order lines. <i>Rule:</i> Rollup is calculated by a rollup only price rule. <i>Schedule:</i> Rollup is calculated by order schedule. <i>Transaction:</i> Rollup is calculated by transaction, from all order schedules that match the same price rule.
Rollup Rule ID	Enter the rule whose rollup is used to select the matching price formula for the current price rule.
Rounding Rule ID	Identify a specific rounding rule to use when determining values such as net price and adjustments.
For	Defines which calculations should have a rounding rule applied to them before arriving at a final value. <i>Adjustment:</i> Round each adjustment. <i>Both:</i> Round both adjustments and the net price. <i>Net Price:</i> Round only the net price. <i>None:</i> Do not round adjustments or the net price
Maximum Quantity	Define the maximum quantity of items to which this price rule can apply. This enables you to introduce a new product to the market at a discounted price for a limited quantity.
UOM	Define the unit of measure for the maximum quantity of items to which this price rule can apply.
Use Grace Days	Select to have the system use the grace days that are assigned to the customer when determining which price formulas are applied to the price. You can assign a grace period (in days) for each customer. Grace days are added to the ending date of the formula.

	Note. This option is not used by PeopleSoft CRM applications. This option is not selected if the price rule is generated by the Pricing Load process in PeopleSoft Promotions Management.
Exclusive Pricing Only	In PeopleSoft Order Management, you can set up a special arbitration plan called an Exclusive Pricing ID. This arbitration plan must specify at least one price rule by name. When this exclusive pricing ID is used in a sales order, the matching arbitration plan is used first. If there are not adjustments applied after the exclusive pricing ID arbitration plan is applied, then the regular arbitration plan is used. By selecting the Exclusive Pricing Only option on the price rule, you specify that this price rule is used only when the exclusive pricing arbitration plan is used.
Stop Processing Here	Select to prevent 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. The stop processing option is handled separately for total order and line adjustments.
Mutually Exclusive	When the Mutually Exclusive check box is selected, if the price rule is found to match the order during arbitration, then that rule is the only rule applied to the entire sales order, no other discounts or surcharges apply to the order. Typically this option is used for discounts that are so good no other discounts are allowed in conjunction with the discount provided by this rule. An example of a mutually exclusive price rule is "Spend USD 10,000 or more, and get 25 percent off the order. No other discounts allowed." If more than one mutually exclusive price rule is matched, only the first (use the arbitration plan to specify the order) mutually exclusive price rule is applied. All other price rules are ignored, including the normal price rule that is sorted before the applied mutually exclusive rule. The process for these price rule is processed separately for order and line/schedule adjustments, similar to the current process for the Stop flag on the rule. Each order can have only one mutually exclusive price rule, and one per schedule. Because a mutually exclusive price rule excludes other regular rules, the Stop flags on those price rules do not stop the mutually exclusive price rules from being applied.
Applicable to List Price	When selected, indicates that the price rule is applicable when list price is the base for pricing calculations.
Applicable to Buying Agreement	When selected, indicates that the price rule is applicable when a buying agreement is the base for pricing calculations.
Applicable to Cost Base	When selected, indicates that the price rule is applied when cost is the base for pricing calculations.
Applicable to Alter Cost Base	When selected, indicates that the price rule is applicable when alternate cost is the base.

Tiered Pricing	When selected, tiered pricing is performed for the price rule. This allows different adjustments for products in the same transaction line. Pricing schedules are created to identify the quantities of each adjustment (formula).
Increment	Identify the increment unit of the tiers. This should match the increment of how the product is ordered (in pricing UOM). It is normally 1, for quantity. The minimum and maximum values for the formula ranges must be multiples of the increment value. For example, if the increment is 5, you can set up the formula ranges as 0–10, 15–25, 30–100, and so forth. If the ordered quantity is 27, the first 10 will match the formula range of 0–10. The next 15 will match the formula range 15–25. The last 2 does not match any formula range and will have no adjustment applied.
Note. Make sure to test the tiers before deploying the price rule.	
Rollup By UOM	When selected, indicates that the rollup is based on the unit of measure.
Note. In Enterprise Pricer 8.8 and previous, Rollup By UOM is automatically used if one of the pricing keys used in the price rule is product or product group. Now, Rollup by UOM is optional.	
Merchandising Type	View the merchandising type associated with the customer promotion or national allowance defined in PeopleSoft Promotions Management.
Promotion Code	View 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.
Formula Range	
Price Type	The price type for the defined formula range. The options are: <i>Quantity:</i> Indicates the formula range pertains to the number of units of the item purchased in the minimum and maximum purchase ranges identified. <i>Price:</i> Indicates the formula range defined pertains to the order value of the item purchased in the minimum and maximum purchase ranges identified. Note. Weight and Volume are other options that are available. Which options are available depends on the transaction setup.
Minimum Amount	The minimum amount, quantity or purchase total, for the specified formula range.
Maximum Amount	The maximum amount, quantity or purchase total, for the specified formula range. The system uses 9999999999 as the default in the High Quantity field for the last price formula if the field is left blank.

Price Formulas

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

Date Range IDs	Identify the date ranges the transaction must match to apply the formula. Separate multiple IDs by a comma (for example, 1,2,3).
Formula Range IDs	Identify the formula ranges the transaction must match to apply the formula. Separate multiple IDs by a comma (for example, 1,2,3). For tiered pricing rules, you can have only one formula range per formula.
Unit of Measure	The unit of measure to be matched to apply the formula. If not provided, match all unit of measures.
Currency	The currency in which the price formula is measured. If not provided, apply to all currencies. Currency is required if the formula range is by price or adjustment is by amount.
Discount/Surcharge By	<i>Amount</i>: Indicates that the adjustment is by amount. <i>Amt & Expr</i> (amount and expression): Indicates that the adjustment is a calculated value derived by the amount or an expression. <i>Expression</i>: Indicates that the adjustment is derived from a specific expression. <i>Ext Class</i> (external class): Indicates that the adjustment is derived from an external class. <i>Pct & Expr</i> (percent and expression): Indicates that the discount is a calculated value derived by a percent or an expression. <i>Percentage</i>: Indicates that the adjustment is by percent. Note. To indicate a discount, enter a negative value for the amount or percentage. A positive value indicates surcharge.
Margin By	<i>Amount</i>: Indicates that the margin matching is by amount. <i>Percentage</i>: Indicates that margin matching is by percent.
Target Discount By	<i>Amount</i>: Indicates that the target discount is matched by amount. <i>Percentage</i>: Indicates that the target discount is matched by percent.
Target Price By	<i>Price</i> : Indicates that the target price is matched by item unit price.
Target Surcharge By	<i>Amount</i>: Indicates that the target surcharge is matched by amount. <i>Percentage</i>: Indicates that the target surcharge is matched by percentage.
Price Override By	<i>Expression</i>: Indicates that the price is derived from a specific expression. <i>Ext Class</i> (external class): Indicates that the price is derived from an external class. <i>Prc & Expr</i> (price and expression): Indicates that the price is a calculated value derived by percent or an expression. <i>Price</i>: Indicates item price is defined by the price in the Price field.
Product Add By	<i>BOGO</i> (buy-one-get-one): The factor by which the product is given away. Enterprise Pricer computes the quantity of the promoted item given away by summing the quantities from the order schedules that match the price rule and dividing them by the BOGO factor, and taking the whole number.

For example, if you had a single formula range of Quantity 1–99999 for Product ID 10050 and the BOGO factor was set to 3, each unit of 10050 purchased in the order would receive 2 units of the item identified on the Product Detail page.

BOGO & Prc (buy-one-get-one and price): In addition to specifying the BOGO factor to calculate the product adds quantity, specify the price of the product add using a mathematical expression.

Qty & Prc (quantity and price): Specify the product add quantity and price.

Qty Exp (quantity and expression): Specify the calculation to use for the product add quantity in the Expression field.

Quantity: Indicates the product add quantity.

Small or Large

When you have a price action type of Discount/Surcharge or Price Override, if you select Price Override By Amount and Expression, Percentage and Expression, or Price and Expression, Enterprise Pricer will perform two calculations and choose either the larger or the smaller net price depending on how you set the Smaller/Larger field. If you select the Smaller option, the smaller net price is chosen by Enterprise Pricer. If you select the Larger option, the larger net price is chosen by Enterprise Pricer. For example, the product's list price is 100 USD. The formula is specified as Amt & Expr and Smaller is selected. The discount amount is –10 and the expression is "LIST_PRICE * 0.95." Discount by –10 results in a net price of 90. The expression is evaluated as 100 * 0.95=95. Because 90 is smaller than 95, a discount of –10 is applied for a net price of 90.

Formula Detail Tab

Select the Formula Detail tab.

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

Product ID

The product ID for the promoted item.

UOM Promo (unit of measure promotion)

Select the UOM for the product that is given away.

Product Add Type

Specify whether you want the giveaway applied to each matched line of the transaction (sales order) or applied only once to the header of the transaction. This applies only to the Product Add By types of *Qty Expr*, *Qty & Adj*, and *Quantity*.

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 system might replace the payment terms on the sales order with the best payment terms from the price rule. You might not get the intended price adjustment if you reprice the order. If you don't want pricing to change, 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.

If a price rule is generated by the Pricing Load process in PeopleSoft Promotions Management with a bill back adjustment type, the discount is not 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 Order Management (OM) Billing Interface process (OM_BILL) posts accounting entries. The discount and surcharge distribution codes found on this page are used on the order by default 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.

Validating Mathematical Expressions

Access the Expression Validator page.

Expression Validator

Math Expression:

LIST_PRICE *.5

Validate Expression

Valid Variables		
Variable Name	Description	Test Value
LIST_PRICE		1.0000
ALT_PROD_COST		
BASE_PRICE		
NET_PRICE		
PROD_COST		
ROLLUP_AMT		
ROLLUP_QTY		

Evaluate with Test Values

Result of Evaluation:

0.5000

OK

Cancel

Expression Validator page

Math Expression

View the mathematical expression entered in the Expression field on the Price Rule Conditions page.

Variable Name

Name of the variable. Options include:

LIST_PRICE: List price for the product.

ALT_PROD_COST: The product's alternate product cost.

BASE_PRICE: The base price for the product.

NET_PRICE: The net price for the product.

PROD_COST: The product cost for the product.

ROLLUP_AMT: The rollup amount for the product.

ROLLUP_QTY: The rollup quantity for the product.

Test Value

Enter a test value to use to evaluate the expression.

Result of Evaluation

After you click the Evaluate with Test Values button the calculated result of the expression appears in the Result of Evaluation field.

Reviewing Price Rule Usage

Access the Sales Order Price Rule Usage page.

Sales Order Price Rule Usage

Transaction: LP **SetID:** SHARE **Rule:** LOAD

Rule Usage Summary	
Customer Count:	1
Order Count:	1
Est Shipment Count:	1
Total Adjustment:	-3.0000 USD

Detail Search	
Business Unit:	
Order No:	
Sold To Customer:	
Clear Search	

Rule Usage Details								
Detail		Additional Detail						
Customer	Business Unit	Order No	Estimated Ship ID	Formula ID	Adjustment Flag	Amount, Percentage, or Price	Calculated Adjustment Amount	Currency Code
1004	US001	CEN1089	0000000001			-3.0000	-3.0000	USD

Sales Order Price Rule Usage page

Rule Usage Summary

Customer Count

The number of customers which have made use of this rule.

Order Count

The number of orders this rule has applied to thus far.

Schedule Count

The number of schedules this rule has applied to thus far.

The price rule usage is updated as order schedules are processed for the order. Therefore, prior schedules will reduce the available quantity for the later schedules in the same order. This is similar to PTD process. To avoid conflict with other orders that are applied by the same price rule, the price rule usage data is retrieved prior to each pricing calculation.

Because tiered pricing breaks the schedule quantity into pricing schedules, the usage for those price rules is calculated by summing the quantities from matching formulas for the same rule. For nontiered pricing, there multiple formulas for the same price rule can apply to the schedule, for all the products in the same schedule. To calculate the usage for these rules, Enterprise Pricer uses the applied quantity from one of the formulas.

Total Adjustment

The total adjustment value thus far for this rule.

Maximum Quantity

The number of product units sold referencing this price rule, this is relevant for rules which identify a maximum quantity.

Rule Usage

Detail Tab

Provides a customer-specific summary of price rule usage for the selected rule, including details such as order number, order lines, schedule, price schedule, formula ID, adjustment flag, amount, percentage, or price, applied adjustment amount, and currency code.

Additional Detail Tab

View the date and time stamp for each instance when the price rule was used for a given customer.

Setting Up Rounding Rules

This section discusses how to define rounding rules.

Page Used to Set Up Rounding Rules

Page Name	Object Name	Navigation	Usage
Price Rounding Rule	EOEP_ROUND_RULE	Pricing Configuration, Create Pricing Information, Price Rounding Rule	Define rounding rules (the decimal points to round the adjustments and net price based on the base price during the pricing calculation).

Defining Rounding Rules

Access the Pricing Rounding Rule page.

Price Rounding Rule

Transaction	Description
SO	Sales Order

Rounding Rule Find | View All First 1 of 1 Last

*Rounding Rule ID: 1234

Description: Decimal Point 3 Places

*Short Description: Dec3

Range ID	Minimum Price	*Maximum Price	*Rounding Position	Decimal Position
1	1	9999999999.9999	Decimal Point	3

Price Rounding Rule page

Rounding Rule ID

Enter an ID for the rule. You must also add a short description.

Minimum Price and Maximum Price

Use to establish different rounding levels by price. Levels can not overlap.

Rounding Position

Select to establish how you want rounding to take place.

By Currency: The defines the decimal precision for the currency code of the transaction. This option is the default.

By Decimal Point: Select this option to round to a specific decimal position. If you select this option, you also must select a decimal position. Values for decimal position are between 0 and 4.

CHAPTER 7

Using the Arbitration Plan

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

Understanding Arbitration Plans

This section discusses:

- Arbitration plans in PeopleSoft SCM.
- Basic arbitration plans.
- Complex arbitration plans.
- Special price action types.

Arbitration Plans in PeopleSoft SCM

The arbitration plan is the arbiter when multiple price rules match the transaction. It determines 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.

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 SCM, 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 this sequence: sold to customer, customer group, and default that is defined for the transaction.

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

The arbitration plan is used for filtering and sorting of adjustments and formulas, it is not used for selecting price lists.

See Also

[Chapter 3, “Implementing Enterprise Pricer,” page 17](#)

Basic Arbitration Plans

You can use the arbitration plan to filter the price rules that are 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 that the arbitration plan is performing as you expect, use the pricing simulator to test the arbitration plan and price rules.

Arbitration Plans That Address Discounts Only

A very basic arbitration plan tells the system how to sort all price rules with conditions that match the transaction. There are numerous decision arbitration types. The example uses the “Highest Discount First” decision.

For the example, add a “Highest Discount First” or “Lowest Discount First” decision to the arbitration plan.

The screenshot shows the 'Arbitration Tree' window. On the left, a tree view shows a folder icon and the text 'Highest Discount First'. On the right, the 'Selection Detail' panel contains the following fields:

- Arbitration Type:** Decision (dropdown menu)
- Decision:** Highest Discount First (dropdown menu)
- Apply Only:** 0 (text input)
- Stop Processing:** No (dropdown menu)
- Update Tree** (button)

Arbitration Tree Section of Arbitration Page - Highest Discount First

If you are certain the price rules are defined only for discounts (no price overrides or giveaways), you can define the arbitration plan this simply. However, if you have more complex price rules you need a more complex arbitration plan.

Arbitration Plans That Apply Highest/Lowest Discount Only Then Stop

If you have more complex price rules but you only want to apply the highest/lowest discount and stop processing price rule sorting and filtering after that, set the stop processing option.

To define an Arbitration Plan which limits the applied adjustments and then stops the arbitration process:

1. Add a Highest Discount First or Lowest Discount First decision to the arbitration plan.
2. Set the Number of Adjustments to Apply field to 1.
3. Select *Yes* in the Stop Processing field to ensure the arbitration plan does not apply any more adjustments beyond the highest/lowest discount.

The screenshot shows the 'Arbitration Tree' window. On the left, a tree view contains a folder named 'Highest Discount First'. On the right, the 'Selection Detail' panel is visible. It includes the following fields:

- Arbitration Type:** Decision (dropdown menu)
- Decision:** Highest Discount First (dropdown menu)
- Apply Only:** 1 (text input)
- Stop Processing:** Yes (dropdown menu)
- Update Tree** (yellow button)

Arbitration Tree Section of Arbitration Page - Highest Discount First and Stop

Complex Arbitration Plans

If you use a price action type other than the Discount/Surcharge price action type, the pricing results using the basic arbitration plan are inconsistent. You must refine the plan based on how you use the pricing features.

Surcharge and Discount Arbitration Plan Criteria

This example is processed in this way: the system selects all price rules with conditions that match the transaction and sorts them first by surcharges and then by discounts. If there are multiple surcharges, the lowest surcharge is applied first. Discounts are applied after all the surcharges are applied (highest discount first).

The screenshot shows the 'Arbitration Tree' window. On the left, a tree view contains a folder named 'Surcharge', which contains a sub-folder 'Lowest Surcharge First'. Below 'Surcharge' is a folder named 'Discount', which contains a sub-folder 'Highest Discount First'. On the right, the 'Selection Detail' panel is visible. It includes the following fields:

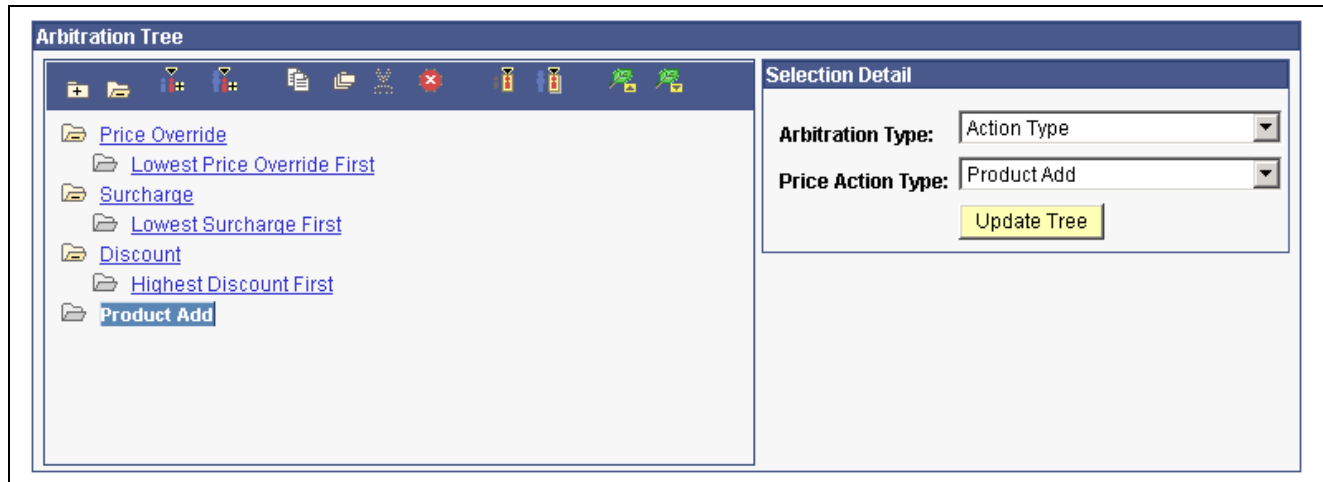
- Arbitration Type:** Decision (dropdown menu)
- Decision:** Highest Discount First (dropdown menu)
- Apply Only:** 2 (text input)
- Stop Processing:** Yes (dropdown menu)
- Update Tree** (yellow button)

Arbitration Tree Section of Arbitration Page - Surcharges Then Discounts

The arbitration plan also can act as a filter to apply certain price rules and not others to a transaction. Although some price rules might match the transaction according to the conditions of the price rule, you can define the arbitration plan to bypass some price rules. The example is also a filter because it applies only 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.

Arbitration Plans That Apply Giveaway and Price Override Rules

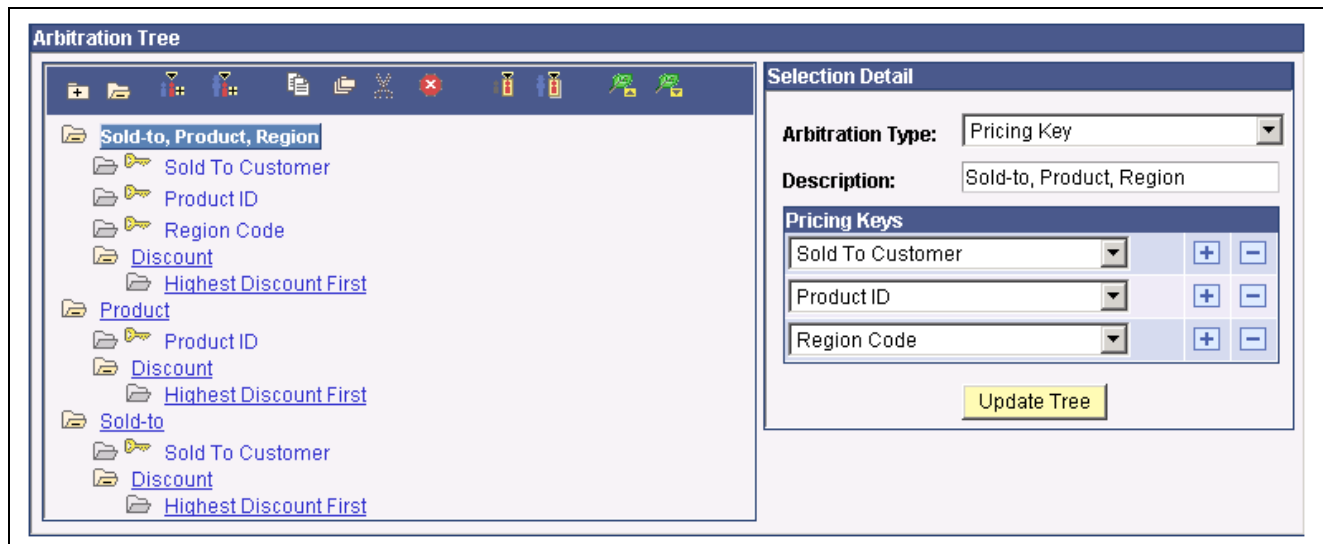
To apply giveaway and price override price rules, you can define the arbitration plan in this manner:



Arbitration Tree Section of Arbitration Page - Product Adds

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 a 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 Tree Section of Arbitration Page - Filtering

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, that is, 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 is 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 previous releases. The node is represented as a sequence in the tree.

Rounding Rule Arbitration Plan Criteria

The arbitration plan, by default, rounds adjustments and prices to a decimal point of 4, or by currency. However, you might want the arbitration plan to round the net price only or the net price and each adjustment before the adjustment is applied, using specific rounding criteria that you define. Enterprise Pricer enables you to define rounding rules that are referenced on the arbitration plan. These rules define how Enterprise Pricer rounds the net price and adjustments during the arbitration process.

Many companies use a break structure for rounding rules, which allows them to get significant additional margin. For example:

- If the unit price is less than USD 0.10, round to three decimal points.
- If the unit price is less than USD 1.00, round to two decimal points.
- If the unit price is less than USD 100, round to one decimal points.
- If the unit price is greater than USD 100, round to zero decimal points.

You can specify whether to round each adjustment before it is applied, or only round the net price after all the adjustments are applied, or both, or none.

Note. The rounding rule and rounding flag on the price rule always overrides the rounding rule and rounding flag specified on the arbitration plan. For example, if the Rounding Flag on the arbitration plan is set to use rounding rule 3 which rounds everything to three decimal points, but the price rule rounding flag is set to *None*, the price and adjustments are not rounded when the price rule is used. The rounding rule and flag defined on the arbitration plan are ignored and the rounding rule specified on the price rule is used. If the arbitration plan and the price rule both do not specify a rounding rule, then the application default rounding is applied. In the case of PeopleSoft Order Management, default rounding rounds the amount to four decimal places.

The *Rounding Rule* and *Rounding Flag* fields appear on the Arbitration page only if they are defined.

Arbitration Plan	Transaction	Description	SetID
NEXT	SO	Sales Order	SHARE
*Description: Simple Arbitration		Price Date: Order Date	☐ Default
Rounding Rule: R02		Rounding Flag: Both	

Arbitration Plan Section of Arbitration Page - Rounding Rule

Different Pricing Base Arbitration Plan Criteria

Enterprise Pricer enables you to define the base for pricing calculations. The options are list price, cost, and alternate cost. You can build the arbitration plan to select the base from these criteria:

- Use Highest Base.
- Use Lowest Base.

- Use List Price as Base.
- Use Cost as Base.
- Use Alternate Cost as Base.

Under this option, Enterprise Pricer sorts the based pricing base price rules to determine the base to use.

For example, the first top-level node in the arbitration plan indicates the system should use the highest base for pricing calculations.

The screenshot shows the 'Arbitration Tree' window. On the left, a tree view contains two nodes: 'Pricing Base' and 'Use Highest Base'. The 'Use Highest Base' node is selected. On the right, the 'Selection Detail' panel displays the following configuration:

- Arbitration Type:** Decision
- Decision:** Use Highest Base
- Apply Only:** 0
- Stop Processing:** No
- Update Tree** button

Arbitration Tree Section of Arbitration Page - Base for Pricing Calculations

During the order arbitration process, the system locates the cost plus price for the product, the list price, and the alternate cost for the product, whichever price is the highest is used as the basis for all pricing calculations.

Mutually Exclusive Price Rules Arbitration Plan Criteria

Enterprise Pricer enables you to create price rules that are mutually exclusive in nature. This means that the mutually exclusive price rule wins out over all other promotional discounts and is the only price rule applied to the order line. If, during arbitration, there are multiple mutually exclusive price rules matching the arbitration plan only the first mutually exclusive price rule is applied. All other price rules are ignored, including the normal price rule that is sorted before the applied mutually exclusive rule.

Note. Because mutually exclusive price rules exclude other regular rules, the Stop flags on those price rules do not stop the mutually exclusive price rules from being applied. There is at most one mutually exclusive price rule per order and one per schedule.

You use the Price Rule Type arbitration type to set up a branch to sort only the mutually exclusive price rules. You set up a separate branch to sort the non-mutually exclusive price rules.

For example, you use mutually exclusive price rules to define exceptional promotions aimed at increasing the total units purchased and the total order value. You create a price rule that specifies orders over USD 50,000 and 1000 units combined receive a discount of 25 percent. When you define the arbitration plan, you set up a separate branch, ideally at the same level as the pricing base node, to sort the mutually exclusive price rules.

When Enterprise Pricer sorts and filters the price rules it locates the matching mutually exclusive rule, goes to the branch containing the mutually exclusive price rule, and applies only that first mutually exclusive rule to the order.

The screenshot shows the 'Arbitration Tree' section of a software interface. On the left, a tree structure is displayed with the following nodes: 'Pricing Base' (selected), 'Use Highest Base', 'Mutually Exclusive', 'Highest Discount First', 'Regular', and 'Highest Discount First'. On the right, the 'Selection Detail' panel contains the following settings: 'Arbitration Type' is set to 'Price Rule Type', 'Rule Type' is set to 'Pricing Base', and there is an 'Update Tree' button.

Arbitration Tree Section of Arbitration Page - Mutually Exclusive Branching

Apply Only “X” Number of Discounts Arbitration Plan Criteria

Numerous discounts might apply to a given order line. However, business needs can dictate that you only want to apply a specific number of discounts rather than every applicable discount located by the arbitration plan.

Note. This option is only available for the Decision arbitration type.

For example, you decide not to allow customers to receive more than three discounts on a decision point:

1. Select the Decision arbitration type.
2. Select the decision sorting order; for our example, select Highest Discount First.
3. Set the Apply Only field to 3.
4. Set the Stop Processing field to *Yes*.
5. Click Update Tree.

The screenshot shows the 'Arbitration Tree' section of a software interface. On the left, a tree structure is displayed with the following nodes: 'Pricing Base', 'Use Highest Base', 'Mutually Exclusive', 'Highest Discount First', 'Regular', and 'Highest Discount First'. On the right, the 'Selection Detail' panel contains the following settings: 'Arbitration Type' is set to 'Decision', 'Decision' is set to 'Highest Discount First', 'Apply Only' is set to '3', 'Stop Processing' is set to 'Yes', and there is an 'Update Tree' button.

Arbitration Tree Section of Arbitration Page - X Number of Discounts

Best Discount/Price Arbitration Plan Criteria

Enterprise Pricer enables you to build arbitration plans that enable you to select the best price for the customer at the point of the calculation (this combines the lowest surcharge, lowest price, and highest adjustments into a single decision point called *Lowest Price First*).

This is the process for building arbitration plans:

1. Select the *Decision* arbitration type.
2. Select the decision sorting order, for our example, select *Lowest Price First*.
3. Set the Apply Only field to *1*.
4. Set the Stop Processing field to *Yes*.
5. Click Update Tree.

The screenshot shows the 'Arbitration Tree' window. On the left, a tree structure is displayed with the following nodes: Pricing Base, Use Highest Base, Mutually Exclusive, Highest Discount First, Regular, and Lowest Price First (which is highlighted). On the right, the 'Selection Detail' panel contains the following fields: Arbitration Type (set to 'Decision'), Decision (set to 'Lowest Price First'), Apply Only (set to '1'), and Stop Processing (set to 'Yes'). An 'Update Tree' button is located at the bottom of the Selection Detail panel.

Arbitration Tree Section of Arbitration Page - Lowest Price

Trade Promotion Only Arbitration Plan Criteria

Enterprise Pricer enables you to build arbitration plans to ensure that, if trade promotions exist, those promotions are the only ones considered during arbitration.

For example, you have both trade promotions and company funded promotions. You want the system to apply the trade promotions only if there are matches found during arbitration.

1. On the first branch of the arbitration plan, select the Price Rule Source arbitration type.
2. Select *Promotion* from the Source drop-down list box.
3. For the second node of the arbitration plan, select the arbitration type, and the Highest Discount First decision.
4. Set the Apply Only field to *1*.
5. Set the Stop Processing field to *Yes*.
6. Click Update Tree.

During arbitration, if matching promotional price rules are located those are used and all regular price rules are ignored.

The screenshot shows a software interface titled "Arbitration Tree". On the left, there is a tree view with two nodes: "Promotion Management" and "Highest Discount First". On the right, there is a "Selection Detail" panel with the following fields:

- Arbitration Type:** A dropdown menu set to "Decision".
- Decision:** A dropdown menu set to "Highest Discount First".
- Apply Only:** A text input field containing the number "1".
- Stop Processing:** A dropdown menu set to "Yes".
- Update Tree:** A yellow button.

Arbitration Tree Section of Arbitration Page - Promotions Only

Special Price Action Types

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 might affect the Stop Processing Here option selected on the price rule. These price action types are:

- Summed

Adjustments are always summed and applied after all other adjustments are made.

- Total Order Discounts/Surcharges

Adjustments are always summed and applied to the total order value after all other line level adjustments are made.

At the end of the arbitration process, any matched product adds are stored. Subsequently, the matching product adds are available for selection by the CSR to add to the order, for example, in PeopleSoft Order Management online order entry.

Note. During batch sales order processing in PeopleSoft Order Management, product adds are added to the order automatically.

Setting Up an Arbitration Plan

This section discusses how to define how price rules apply to transactions.

Page 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.

Defining How Price Rules Apply to Transactions

Access the Arbitration Plan page.

Arbitration Plan

Arbitration Plan	Transaction	Description	SetID
DEFAULT	SO	Sales Order	SHARE

*Description: Price Date: ☒ Default

Rounding Rule: Rounding Flag:

Arbitration Tree

- Sequence 1
 - Payment Terms ID
 - Extended Price
 - Price Override
 - Rule Name in Ascending Order
 - Cascading
 - Rule Name in Ascending Order
 - Summed
 - Total Order Discount
 - Total Order Surcharge
 - Product Add
- Sequence 2
- Sequence 3
- Sequence 4

Selection Detail

Arbitration Type:

Cascading/Summed:

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 you can specify 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 use when evaluating date ranges on the price rules that are defined as Price Date. This is the date that is used for the start date of individual products that are on the price list.

Values are:

Effective Date: The default date used in pricing process, similar to other dates such as Order Date. In PeopleSoft Order Management, it is the order date; in PeopleSoft Contracts, it is the contract date.

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.

System Date: The system date on the application server when the transaction is processed.

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

Click the toolbar buttons 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 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 to paste it 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 for pasting 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 entire selected branch up a sequence at the same level.
Move Down	Click this button to move the entire selected branch down a sequence at the same level.

Selection Detail

Arbitration Type

Select from these options to add nodes to the arbitration tree to determine how the system applies the price rules. This list of values is determined during implementation on the Price Transaction Code page.

You can set up the arbitration plan to sort matching price rules or 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.*
- *Price Override.*

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

- *Product Add.*
- *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 one of the decision values that are used to break a tie in the case of the system encountering two nodes that match the rule.

- *Apply Only.*

Specify the number of adjustments allowed for the selected decision type.

- *Stop Here.*

Set to *Yes* if you want the arbitration plan to stop processing rules once the criteria selected for the decision point are met.

Date Range.

Use to limit the effectiveness of the arbitration plan branch. 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 Rule Source.

Select a price rule source. The options are Enterprise Pricer and Promotion Management.

Price Rule Type. Select the type of price rule to arbitrate:

- *Mutually Exclusive.*
Select to build a node that addresses how Enterprise Pricer should arbitrate mutually exclusive price rules.
- *Pricing Base.*
Select to build a node that addresses how Enterprise Pricer should arbitrate pricing base rules.
- *Regular.*
Select to build a node that addresses how Enterprise Pricer should arbitrate regular price rules.

Price Type.

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

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

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

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 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 refresh the selections to the arbitration tree. This does not save the changes to the arbitration plan.

CHAPTER 8

Working With the Pricing Simulator

This chapter provides an overview of the pricing simulator 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.

The Pricing Simulator is used to review basic pricing simulation. Price rules with historical data, such as Period-to-Date price rules, One-time-only price rules, and price rules specifying a maximum quantity are not simulated.

Additionally, the pricing simulator cannot simulate PeopleSoft Order Management-specific features such as Grace days, Exclusive Pricing, and Buying agreement. Finally, you cannot use the pricing simulator to view product-specific data including product cost and KVI/NDP values. These values are not retrieved during simulation, however, you can enter them on the Simulator page.

Viewing Simple Item Adjustments in the Pricing Simulator

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 these steps:

1. Create one new price rule:
 - Add Sales Orders as the Transaction on the Rule Attributes section of the Conditions page. Enter a Description and change the Mode to Basic.
 - Add Sold to Customer 1005 and Product ID 10050 to the Rule Conditions section of the Conditions page.

Note. When the price rule is in basic mode the price rule conditions, in this case Sold to Customer 1005 and Product ID 10050, are automatically AND'd together.

- On the Rule Attributes section of the Formula page, select Discount/Surcharge as the Price Action Type, and Cascading in the Cascading/Summed field.
- Set the Rollup By field to *Transaction*.

- On the Date Range section of the Formula page, enter this information:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	Today	December 31, 2005

- On the Formula Range section of the Formula page, enter this information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	10

- On the Formula Definition section of the Formula page, enter this information:

Date Range ID	Formula Range ID	UOM	Currency	Discount /Surcharge By	Amount /Percentage
1	1	<blank>	EUR	Amount	-10

- 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.
- On the Pricing Keys section of the Simulator page, enter the 1005 Sold to Customer and 10050 Product ID.

- 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 also appears to indicate how the scenario is priced on the 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.

Viewing Product Adds in the Pricing Simulator

Enterprise Pricer enables you to create price rules that giveaway products, discount products, and even offer buy-one-get one deals to customers.

- Create one new price rule:
 - Add Sales Orders as the Transaction on the Rule Attributes section of the Conditions page. Enter a Description.
 - Add Product ID 10050 to the Rule Conditions section of the Conditions page.
 - On the Rule Attributes section of the Formula page, select Product Add as the Price Action Type.
 - Set the Rollup By field to Transaction.
 - On the Date Range section of the Formula page, enter this information:

Date Range ID	Pricing Date	Start Date	End Date
1	Order Date	January 1, 2005	December 31, 2005

- On the Formula Range section of the Formula page, enter this information:

Formula Range ID	Price Type	Minimum Amount	Maximum Amount
1	Quantity	1	10
2	Quantity	11	999999.00

- On the Formula Definition section of the Formula page, enter this information:

Date Range IDs	Formula Range IDs	UOM	Currency	Product Add By	Qty /BOGO Factor	Product	UOM	Per
1	1	<blank>	EUR	Quantity	1	10049	EA	Order
1	2	<blank>	EUR	Quantity	2	10049	EA	Order

- On the Formula Detail page, in the Product ID field, input the item number for the giveaway item, for our example 10049, and select EA for the UOM. Select the *Per Order* option for the Product Add Type.
- Create one simple arbitration plan on the Arbitration page. It should have the Arbitration Type of *Price Rule* and identify the price rule you just created.
 - In the Header group box of the Simulator page attach the newly created arbitration plan.
- In the Line Information group box, enter the line:

Product ID	UOM	Quantity
10050	EA	5
10050	EA	5
10050	EA	5

- Click the Calculate button.

The results bring back the net unit price for the product. In this example, the order has an additional line added to it, in the product adds section, with two giveaway items (Item ID 10049) that are granted to the customer based on the applied price rule. Two items are given away because the rollup for this price rule is set to *by transaction*, which is 15 (the sum of all of the order lines). To verify that the correct price rule is applied, click the Details button in the Line Info tab.

The applicable product add lines appear in a grid called Product Adds below the Line Information grid.

See Also

PeopleSoft Enterprise Order Management 9.0 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.

Common 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.

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 are 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.

Note. Line-level information that is entered in the Header Information section is applied to all 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 Enterprise Pricer and to select values for the transaction price-by keys that are used in the pricing simulation.
Pricing Keys, User Dates/Variables	EOEP_TEST_LN_KEY	Click the Pricing Keys, User Variables button on the Simulator page.	Use to select and view the line-level pricing keys that are used in the pricing simulation. It also enables you to enter test values for user dates and user pricing variables.
Header Adjustments	EOEP_TEST_HD_ADJST	Click the Adjustments button on the Simulator page.	View the details of the adjustments that apply to the header. Note. The link for this page is only available if adjustments apply to the header.
Line Adjustments	EOEP_TEST_LN_ADJST	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. Note. The link for this page is only available if adjustments apply to the line.

Running the Pricing Simulator

Access the Simulator page.

Simulator

Transaction	Description	Price Test ID
SO	Sales Order	11122244

Description: Simple Simulation

▼ Header Information

Currency Code:	EUR	Pricing Keys	Find View All	First	1-2 of 2	Last
Base Currency:	EUR	Key field code	Value			
Transaction Date:	03/23/2005	Sold To Customer	1005		+	-
Arbitration Plan:	AB-0000001	Product ID	10050		+	-

▼ Line Information

Customize | Find | View All | First | 1 of 1 | Last

Line	Product ID	UOM	Pricing UOM	Qty	Unit Cost	List Price	Net Unit Price	Price Protected
1	10050	EA	EA	5.0000		25.9900	28.5890	

Price Simulator page (1 of 2)

▼ Product Adds

Customize | Find | View All | First | 1 of 1 | Last

Line Tag	Price Rule	Giveaway Type	Product ID	Unit of Measure	Quantity	Price Formula	List Price
1	PR-00000000000000000004	Per Order	10051	EA	5.0000		

Transaction Total	
Total Net Price:	142.95
Adjustment Amount:	28.59
Transaction Total:	171.53

Statistics	
Number of Rules Used:	2 of 30
Number of Adjustments Applied:	2
Number of Product Adds Found:	1

Calculate

Price Simulator page (2 of 2)

Note. When you use the simulator 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.

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

- The price rule assigned to the arbitration plan has a status of *Deployed* or *Ready to Test*.
- The quantity or amount reflect what was specified on the Formulas page of the price rule.
- The date matches the date break of the formula.

Review the text in the Rule Definition group box on the Conditions page to ensure that it accurately reflects how the conditions for the rule are applied.

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.
Transaction 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 is used.

Line Information

Select the Line Info tab.

Select product, ordering unit of measure, pricing unit of measure (if applicable) and quantity to simulate the transaction line detail.

Unit Cost	Enables you to specify the unit cost for the item directly in the simulator.
List Price	View the list or base price for the product.
Net Unit Price	View 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	Select if the product is price protected on the applied price list.
	Click the Pricing Keys, User Variables button to edit or view the pricing keys, user dates, and user variables 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.
Additional Information Tab	Use to enter the schedule ship and arrival dates for the order as well as to simulate different pricing for KVI, NDP, and regular products.
Pricing Details Tab	Use to view a summary result of the pricing process for the line.
Pricing Quantity	View the quantity in the pricing unit of measure that is used in the pricing calculation.
List Price Origin	View the origin of the list price. <i>Price List:</i> The price is retrieved from a price list. The price list ID appears next to Price List Origin field. <i>Price List (base):</i> 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 CRM 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

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

Pricing Base Price

View the base price for the item in the pricing UOM.

Pricing List Price

View the list price for the item in the pricing UOM.

Pricing Net Unit Price

View the net unit price for the item in the pricing UOM.

Payment Terms

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

Note. This option is used in PeopleSoft SCM installations only.

Margin Violated

This box is checked if the line violates any minimum or maximum margin rules.

Product Adds

Additional lines for the Product Adds sorted and matched by the arbitration plan appear here.

Transaction Total

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

Statistics

View statistical results of the simulation.

Calculate

Calculate

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

CHAPTER 9

Updating Price Lists

This chapter provides an overview of price list updates, lists prerequisites, and discusses how to update price lists.

Understanding Price List Updates

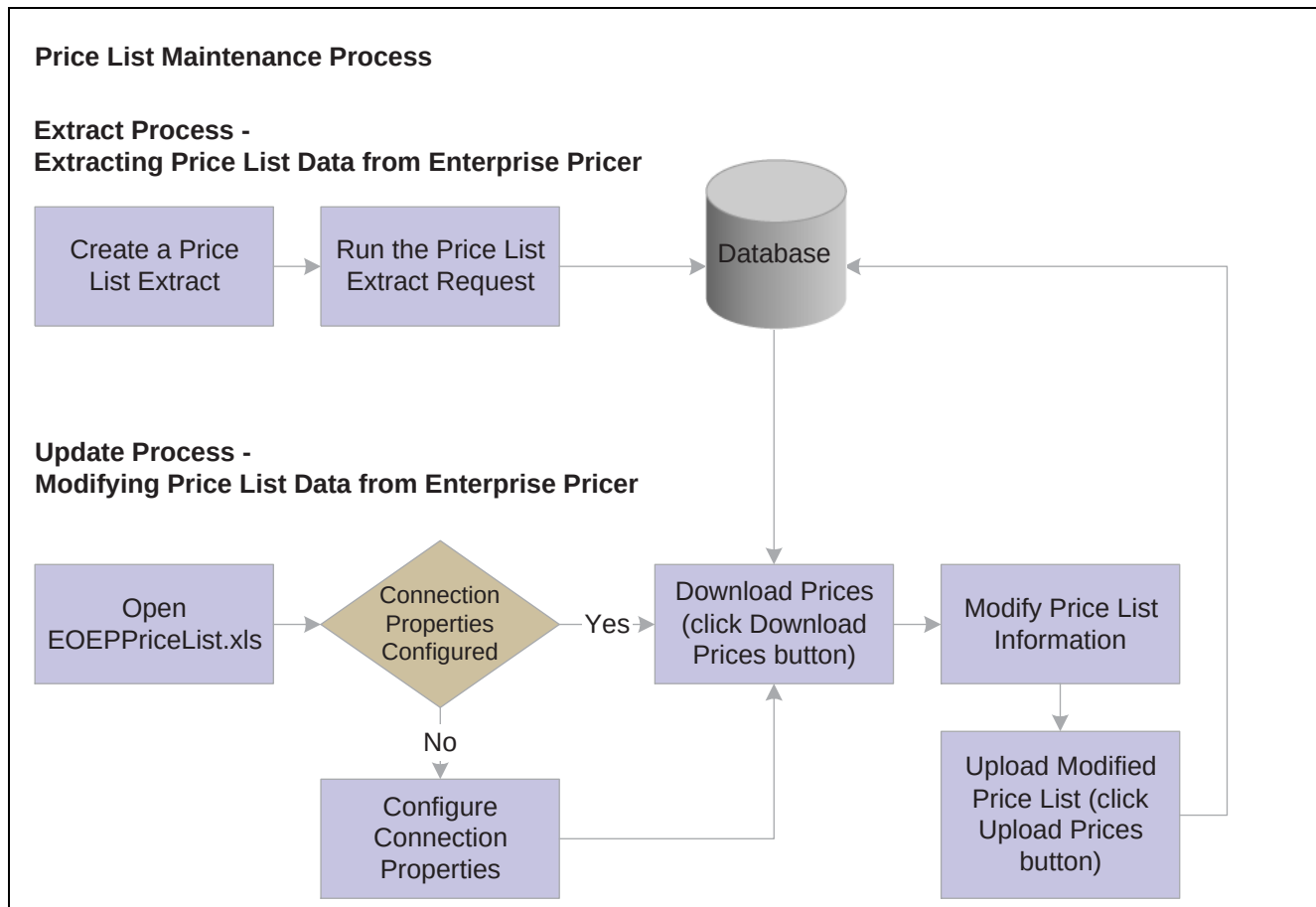
You can update product list prices on price lists individually using the Price Lists page, or apply changes globally using the Price List Maintenance process in Excel.

Mass price list maintenance is performed using Excel. You create the price list updates directly in Excel. You can also use this process to update price lists and to convert an existing price list into another currency. Excel communicates those changes to Enterprise Pricer using a simple request and reply system. No other technologies are required to provide a communication channel with the Enterprise Pricer.

Remember:

- You can change prices on the Price List page between the export and import of pricing data.
You can override those changes when new pricing information is imported from Microsoft Excel.
- Price list maintenance requires that you use portal navigation and a Windows client running Microsoft Excel.

This diagram illustrates the process for performing mass price list updates:



Price List Maintenance process

To update price lists using price list maintenance:

1. On the Price List Extract page, create a request for data, specifying the exact search criteria and submit the job for processing.

The application extracts the selected data and stores it into a EOEP_LIST_COST record.

2. Launch Excel Price List Update (EOEPPriceList.XLS).
3. Click the Download Prices button and supply logon data.

Excel loads and formats the received data.

Note. If you are working with the EOEPPriceList.XLS file for the first time, click the Connection Properties button to set connection properties. Typically, the system administrator should have already performed this step.

4. Click the Price Maintenance button or directly modify the spreadsheet to update prices.
 - You can adjust by amount or percent the price for all items in the price list.

When choosing which rows to modify, you can specify criteria such as current-dated rows, future-dated rows, or all rows. In addition, you can apply the changes to visible, hidden, or all rows, as necessary. You can also specify the rounding decimals for the newly created prices.

- You can adjust the start and end dates for the price list.

When choosing which rows to modify, you can specify criteria such as current dated rows, future dated rows, or all rows. In addition, you can apply the changes to visible, hidden, or all rows, as necessary.

- You can adjust the quantity break high and low for the price list.

When choosing which rows to modify, you can specify criteria such as current high and low quantity rows, future dated high and low quantity rows, or all rows. In addition, you can apply the changes to visible, hidden, or all rows, as necessary.

- You can set the protect flag for all items in the price list.

When choosing which rows to modify, you can specify criteria such as current dated rows, future dated rows, or all rows. In addition, you can apply the changes to visible, hidden, or all rows, as necessary.

5. Click the Upload Prices button and provide logon data to upload the changes made to the price lists to Enterprise Pricer.

Confirmation of the update is sent back to Excel. For each row that successfully applies, the status column turns green and reads *Uploaded*. If the a row in the price list does not post properly, the column turns red and reads *Failed*.

6. Modify any rows that failed to post and click the Upload Prices button again to resubmit the rows.

Prerequisites

Before using the Excel spreadsheet to maintain price lists:

- The system administrator should confirm that the workstation is correctly configured.

Several supporting applications are needed to enable Microsoft Excel and the PeopleSoft system to communicate with one another. Additionally, there are some minimum system requirements for proper functioning of the download and upload of data between Excel and the PeopleSoft system. Ensure that the workstation is an IBM Compatible PC running Windows 2000 Professional operating system and that Microsoft Excel for Office 2000 is installed. You also need the Microsoft XML Parser (MSXML.dll) Version 3.0 SP2 or greater, Visual Basic 6.0 SP5: Run-Time Redistribution Pack, and Microsoft Office 9.0 Object Library or greater.

- Enter connection information to the PeopleSoft system.

The information provided is saved to the spreadsheet for further connection attempts. The system administrator should complete this information on a copy of the EOEPPriceList.xls file and distribute the modified spreadsheet all users. These are the settings for the connection properties on the EOEPPriceList.xls file.

Property	Set To
Web Server Machine Name	Enter the name of the PeopleSoft web server.
Protocol	Enter the Web server protocol. Either <i>http</i> or <i>https</i> .
HTTP port	Port the web server is using.
Portal	Name of the portal that is used.

Property	Set To
Site Name	Enter the site name as defined when setting up PeopleSoft Internet Architecture.
Node Name	Enter the node name of the PeopleSoft system.
Language Code	Enter the PeopleSoft language code to specify the data download language.
Chunking Factor	If data is uploaded and processed by a component interface, enter the number of transactions that are sent at a time for processing by the component interface.

- Obtain security permission.

The ability to perform price extracts using the Price Extract component (EOEP_PRCLST_XTRACT) is controlled by user security. You must have permission to use this object if you are responsible for extracting the price list data for mass maintenance purposes.

The modified price list data is uploaded using the EOEP_PRICE_LIST_CI component interface. You must have permission to use this object if you plan to use the EOEPPriceList.xls file to perform mass Price List Maintenance for Enterprise Pricer.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, “Securing Your System”

Updating Price Lists

This section discusses how to:

- Export price list data to Microsoft Excel.
- Update price lists.
- Update currencies.
- Reset price list data.
- Customize display options.
- Print price list data changes.
- Display price list charts.
- Upload price list data.

Page Used to Update Price Lists

Page Name	Object Name	Navigation	Usage
Price List Extract	EOEP_LIST_RCNTL_PG	Pricing Configuration, Mass Updates, Price List Extract	Export price list data to Microsoft Excel for mass adjustments or currency conversion.

Exporting Price List Data to Microsoft Excel

Access the Price List Extract page.

Price List Extract page

- | | |
|------------------------------|--|
| Select Currency Code | Select to restrict the download to a specific currency. A single price list ID can encompass price lists in more than one currency. |
| Currency Code To | Convert an existing price list into another currency. |
| Cost Business Unit | Choose the warehouse that the system should use for retrieving cost data because product costs for inventory items are stored per warehouse (PeopleSoft Inventory business unit). |
| Price List As Of Date | <p>Enter a price list as of date. The system downloads the price list with the start date that is less than or equal to the date that you enter here and in all detail rows included on the price list. Each product on a price list can have more than one price-each with a unique start date and end date. Additionally, all future price list entries are downloaded.</p> <p>In this example, assume that the Price List As of Date field is set to <i>January 1, 2005</i>. The current price list entry, which has a start date of December 1, 2004 and an end date of December 1, 2005, is downloaded. Any price list entries that fall before this current entry are not downloaded. Any price list entries that have a start date beyond this range are also downloaded.</p> |

Product Cost Effective Date Determines which cost value to return.

See Also

Chapter 5, “Creating Price Lists,” page 49

Updating Price Lists

Click the **Download Prices** button to download the information to the spreadsheet.

The **Toggle Display** button is the only other button that acts directly on the data in the spreadsheet; the other buttons open dialog boxes where you select other options.

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

- The **Status** field identifies the status of the price list record in the PeopleSoft system.
When you export the price list to Excel from the PeopleSoft system, the status reads *New*. When you modify a price list record and it successfully posts back to the PeopleSoft system, the status reads *Uploaded*. If an item fails to post in the PeopleSoft system from Excel, the status column reads *Failed*.
- Key fields that identify the price list and product appear in yellow columns.
- Editable fields appear in the light blue columns.
These fields include New Cost, New Price, Diff Abs., New Start Date, New End Date, New Break Qty Low, New Break Qty High and New Protected Flag.
- Current price and cost information appear in grey columns.
These cells and all of the other cells on the spreadsheet are locked.
- Click the **Customize Display** button to change the colors of these columns.

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.

Download Prices Click the button to populate the spreadsheet with product information.

Key Field Columns

Prod. IDs (product IDs) View product IDs. A product ID might have multiple listings in a single price list if there are multiple prices with unique start and end dates, units of measure, or currencies.

Editable Columns

The data in these columns updates the PeopleSoft tables. You can edit each cell individually or apply mass maintenance changes.

New Cost View cost information for inventory products and for non-inventory products. You cannot edit this column.

New Price Matches the value in the Price field 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.

New End Dt. (new end date)	Matches the end date on the price list.
New Protected. (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 is selected. You can alter this option in the column.
New Break Qty Low	Matches the Low Quantity on the price list. This is the minimum quantity on the order to select the price list entry.
New Break Qty High	Match the High Quantity on the price list. This is the maximum quantity on the order to select the price list entry.

Current Price and Cost Information Columns

The information in these columns is available for comparison, but you cannot change the values. The toggle between the two differences affects both the New Diff. (new difference) column and the Diff % (difference percent) column.

Price List Maintenance Dialog Box

Access the Price Maintenance dialog box to apply changes to multiple products in the editable columns:

Price Maintenance	Click the button to access the Mass Maintenance dialog box.
Type	Select the type of change: Percent, Amount, Date, or Protected Flag. The label of the first field changes depending on the type of change that you make. Options are unavailable when the selection criteria does not apply.
Based On	Select the basis for the change: Price List (New Price column), Differences between the cost and list price (New Diff. column), End Date (New End Date column), Start Date (New Start Date column), Low Quantity (New Break Qty Low column) or High Quantity (New Break Qty High column).
Preview	Click this button to see an example of the current change before you apply it to data. Remember 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 that the system uses in rounding to the new price by changing the value in the field. Values are 0 to 4. You can round to a different number of decimals without changing any other data. 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 appears in the number of decimals for rounding is determined by computer settings. To change the default, select Control Page, Regional Settings, Currency.

Inserting and Deleting Rows

Insert New Row	Click the button to insert a row after the highlighted row. The new row will copy the All Date Ranges and Adjustment Flag from highlighted row.
Delete Row	Click the button to delete a row. You can only delete a row that was inserted using the Insert new Row button.

Updating Currencies

Access the Price List Extract page and select the Single option.

Price List Extract page

The Currency Code To field on the Price List Extract appears. Enter a currency code to add a new currency within the selected price list ID. If the currency code that is entered field already exists for the price list, the price list is updated.

The fields on the Mass Maintenance dialog box that pertain to currency updates are:

Exchange Rate

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 the organization.

You cannot base changes on differences in this mode because the cost information appears in the original currency code, and the recalculated pricing reflects the currency to values.

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

Resetting Price List Data

Access the Reset Price List Data dialog box to reset the data to the original data from the download:

Reset Data

Click the 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.

New Prices to Active Prices	Select to reset values in the New Price column to those that appeared at download. These are the same values as those in the Active Price column.
New Prices to New Cost	Select to reset values in the New Price column to match the values in the New Cost column.
Start Dates	Select to reset values in the New Start Dt. column to those that appeared at download.
End Dates	Select to reset values in the New End Dt. column to those that appeared at download.
Protected Flag	Select to reset values in the New Protd. column to those that appeared at download.
Low Quantities	Select to reset values in the New Break Qty Low column to those that appeared at download.
High Quantities	Select to reset values in the New Break Qty Highcolumn to those that appeared at download.

Customizing Display Options

Access the Customize Sheet dialog box:

Customize Display	Click the toolbar button, and select one of these options:
Color Selection	Enables you to set the cell color for each of the three data types: key fields, new data, original data.
Current Settings	Select each column from the drop-down list box, and enter values in either the New Heading or New Width fields, or both, if you prefer different headings or column widths.
Adjust Column Width to Best Fit	Select this option to set column widths so that the values entered appear. These widths override any manually entered column widths.
Display changed rows only	Select this option to display only those rows that are changed. To display all rows, clear this option.
Reset all Data Filters	Select the option to display all the downloaded data (if you have restricted the appearance of spreadsheet rows using the filtering option on one or more columns).
Apply	Click this button to apply changes to each column one at a time.

Printing Price List Data Changes

Click the Print Price List button to print the spreadsheet. The system includes auto-filter settings and prints only the rows that are changed.

Print Price List	Click the button to print the spreadsheet data.
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Displaying Price List Charts

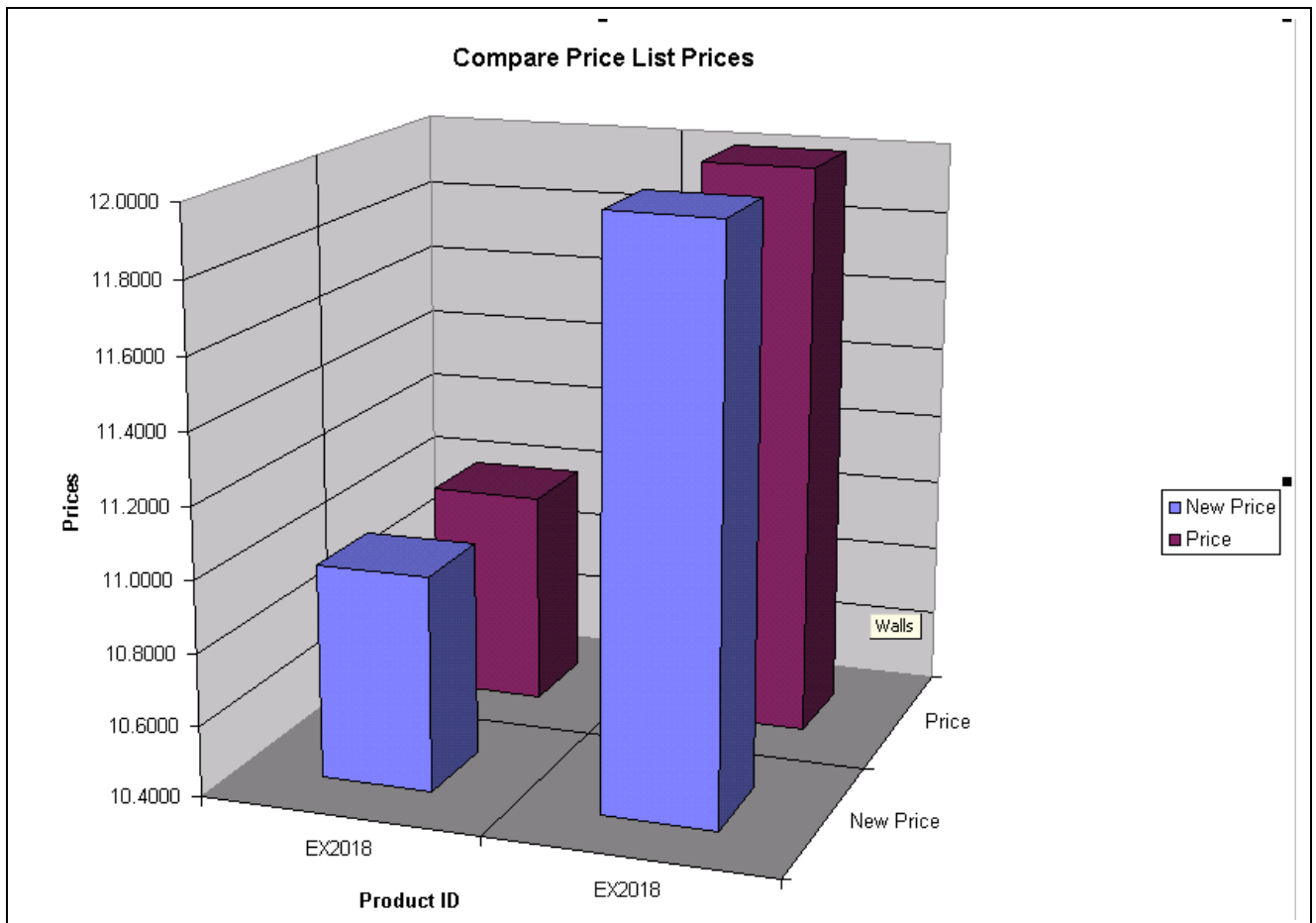
Use the Create/Display Charts dialog box to create graphical charts of the list prices.

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

View Charts	Click the button to create charts based on prices, differences, or both.
Create new Chart	Select this option to define the type of chart that you want to create.
Display Existing Chart	Select this option to select a chart that you want to view again.
Return to Price Lists	Select this option to exit the chart creation process and return to the price list spreadsheet.

In the Chart selection dialog box, select:

Compare Prices on List	Select this option to compare the existing downloaded price and the new price entered.
Compare Differences	Select this option to compare the price differences among the items on the price list.
Both Price Lists and Differences	Select this option to display a chart with both outputs from the Compare Prices on List and Compare Differences fields.
Keep previous chart	Select this option to keep the previous chart. If you do not select this option, the previous chart is replaced.
OK	Click, and the chart that you have selected appears.



Example of a chart for price lists

Return to Product Prices

Click the Chart button on the price maintenance toolbar and select the Return to Product Prices option to return to the spreadsheet.

Uploading Price List Data

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 Protld. (new protected), New Break Qty Low or New Break Qty High columns.

Uploading Price List Data

Click the Upload Prices button on the price maintenance toolbar.

Upload Prices

The prices are uploaded into the PeopleSoft system. If the row applies successfully the status in the Status column for row changes to *Uploaded*. If the row does not apply successfully the status in the Status column changes to *Failed*. Correct the error(s) for the row and click the Upload Prices button.

APPENDIX A

Enterprise Pricer Reports

This appendix provides an overview of Enterprise Pricer reports.

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

Enterprise Pricer Reports: A to Z

This section discusses:

- Price List reports.
- Price List nVision reports.

Note. nVision reports are 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	Lists 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	Lists 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	Lists 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	Run from the PeopleTools window client.	OM_PLST.XLS

Glossary of PeopleSoft Enterprise 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.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
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 Enterprise Human Resources, PeopleSoft Enterprise Benefits

	Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Enterprise 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 Enterprise 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.
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft Enterprise 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 Enterprise 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.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise 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 Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise 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 activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise 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).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i>.
business unit constraints	In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft Enterprise 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.
buy event	In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction. For bidders, the sale of goods or services.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
cash drawer	A repository for monies and payments taken locally.
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 Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner	In PeopleSoft Enterprise 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.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
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 Enterprise 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 Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
claimback	In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
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> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
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.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .

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, PeopleTools maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Enterprise 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.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
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.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise 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 Enterprise. 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.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
constraint	A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.
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. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

	3C access groups so that you can assign data-entry or view-only privileges across functions.
	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.
control table	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 plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
cost profile	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.
cost row	A cost transaction and amount for a set of ChartFields.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also <i>class</i> .
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	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).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	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.
dataset	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. In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.
delivery method type	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.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
direct receipt	Items shipped from a warehouse or vendor to another warehouse.
direct ship	Items shipped from the vendor or warehouse directly to the customer (formerly referred to as <i>drop ship</i>).
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i>.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
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 Enterprise 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 Enterprise 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 Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise 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 Enterprise 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.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
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. In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
event constraints	In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.
event propagation process	In PeopleSoft Enterprise 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. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Enterprise 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 Enterprise 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.
financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
financial sanctions	For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment. For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).
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 Enterprise 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.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
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.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GDS	Abbreviation for <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
global constraints	In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.
group	In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise 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 Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.
ideal response	In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.
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, and user interaction objects.

incentive rule	In PeopleSoft Enterprise 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 Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise 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 Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.
itinerary	In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as <i>pending reservations</i> . Reservations that have been paid for are referred to as <i>confirmed reservations</i> .
joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
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.
KVI	Abbreviation for <i>Known Value Item</i> . Term used for products or groups of products where the selling price cannot be reduced or increased.
landlord	In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise 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.
lease	In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.
lease abstract	In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.
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.
line	In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft Enterprise 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 Enterprise 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.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Enterprise 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 <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Enterprise 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 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 Enterprise 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 Enterprise 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.
NDP	Abbreviation for <i>Non-Discountable Products</i> . Term used for products or groups of products where the selling price cannot be decreased.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
Optimization Engine	A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.
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 Enterprise and non-PeopleSoft Enterprise 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 <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Enterprise 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 Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure 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.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
phase	A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.
pickup quantity	The product quantity that the customer is taking with them from the counter sales environment.
plan	In PeopleSoft Enterprise 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 Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft Enterprise 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.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	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	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 conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise 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	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product adds	The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as <i>giveaways</i>).
product bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
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 Enterprise 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 Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
proxy bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
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 Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT 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 Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
reference 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).
reference transaction	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.
regional sourcing	In PeopleSoft Enterprise 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.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.

REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reservations	In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
RFI event	In PeopleSoft Strategic Sourcing, a request for information.
RFx event	In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.
role	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.
role user	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.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	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.
run control ID	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.
saved bid	In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.
score	In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
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.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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.
sell event	In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.
serial genealogy	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements. 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 Enterprise 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.
short-term customer	A customer not in the system who is entered during sales order entry using a template.

single signon	With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft Enterprise 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.
sourcing objective	For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).
speed key	See <i>communication key</i> .
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.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise 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 Enterprise 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 Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch). When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).
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.
task	A deliverable item on the detailed sourcing plan.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
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 Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
tenant	In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.
territory	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
tiered pricing	Enables different portions of a schedule to be priced differently from one another.
time span	A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.
total cost	In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

travel group	In PeopleSoft Expenses, the organization's travel rules and policies that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.
travel partner	In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
trace usage	In PeopleSoft Enterprise 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 Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
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 Enterprise 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.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access*.

user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise 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 Enterprise 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 term 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 Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise 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.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise 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 link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

yield by operation

In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. 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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