Siebel Deal Management Administration Guide

Version 8.0

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1 What’s New in This Release

What’s New in Siebel Deal Management Administration Guide, Version 8.0

This is the first release of Siebel Deal Management Administration Guide.

Table 1 lists the major features of the product described in this version of the documentation.

Table 1. New Product Features in Siebel Deal Management Administration Guide, Version 8.0

Topic	Description
Chapter 2, “Setting Up Siebel Deal Management”	This chapter describes how to create and configure pricing strategies for Oracle’s Siebel Deal Management and how to administer Workbench for Oracle’s Siebel Deal Management.
Chapter 3, “Pricing for Deal Negotiation”	This chapter provides information about the pricing process when users create deals (quotes and orders) in Siebel Deal Management.
Chapter 4, “Siebel Deal Management Workflows”	This chapter describes some changed and new workflows for Siebel Deal Management.

2 Setting Up Siebel Deal Management

This chapter describes how to create and configure pricing strategies for Oracle's Siebel Deal Management and how to administer Workbench for Oracle's Siebel Deal Management. It includes the following topics:

- About Siebel Deal Management on page 7
- Process of Creating Pricing Strategies on page 7
- Associating Accounts with Pricing Segments on page 21
- Process of Configuring Workbench on page 22

About Siebel Deal Management

Siebel Deal Management assists users in negotiating prices for quotes and orders. *Price administrators* can create pricing strategies that influence the price negotiation process. When creating a quote or an order, the sales representative selects a customer account and some conditional-deal specific criteria. The sales representative then selects a pricing strategy. The pricing strategies that satisfy the account and conditional-deal specific designations are available for selection. The pricing strategy on the quote or order determines the latitude for action that the sales representative has when negotiating prices for that quote or order. If the sales representative enters a negotiated price that is lower than or equal to the price that is associated with the pricing strategy, a price exception results.

Price approvers review price exceptions. Price approvers can access Workbench from the Quotes screen to obtain more information that is relevant to pricing, and can use this information to evaluate the price exception. They use Workbench to access information about market conditions, pricing trends, deal profitability, and the history of customer performance. Price administrators can configure Workbench. For more information about using Workbench, see *Siebel Deal Management Workbench User Guide*.

Process of Creating Pricing Strategies

Pricing strategies are the pricing policies for a business. To create pricing strategies, price administrators must first create the pricing strategy elements, such as the criteria, pricing segments, guideline plans, and price lists, and then use these elements to define the pricing strategy. The pricing strategy on a quote or an order establishes the limits for the prices that the sales representative can enter in that quote or order.

To create pricing strategies, price administrators perform the following tasks:

1. Creating Pricing Criteria on page 8
2. Configuring Pricing Criteria on page 9

3 Defining Pricing Segments on page 11

4 Creating Guideline Plans on page 12

5 Defining Pricing Strategies on page 19

Creating Pricing Criteria

Pricing criteria represent the characteristics of a customer or deal. Price administrators set up the pricing criteria that are the key factors in determining the pricing strategy for their business. You use the values for the pricing criteria when you define the pricing segments and pricing strategies. You can assign one of the following two categories to pricing criteria:

- **Primary.** Criteria in this category represent the characteristics of a customer account. You use the values for the criteria in this category to define the pricing segments. Also, you assign the values for the criteria in this category to customer accounts.

  Siebel Deal Management includes the following primary criteria:

  - Customer Value. Values include: Very high, High, Medium, and Low.
  - Pricing Criteria Industry. Values include: the selectable values in the Industries field for an account.
  - Geography. Values include: the selectable values in the Country field for an account address.
  - Channel. Values include: Consumer, Distributor, OEM, Retailer, Systems Integrator.
  - CTS (Cost-to-Service). This criterion indicates the cost to service the customer account. Values include: Very high, High, Medium, and Low.

- **Conditional-Deal Specific.** Criteria in this category represent the characteristics of a deal. You use the values for the criteria in this category and the other elements to define the pricing strategies. Also, you can select the values for the criteria in this category in header records for quotes and orders.

  Siebel Deal Management includes the following conditional-deal specific criteria:

  - Deal Type. Values include: Quote and Order.
  - Competitor. Values include: the values in the Competitors screen.

Price administrators use the procedure in this topic to set up additional criteria. After they create new pricing criteria, they must use Siebel Tools to configure the new criteria and to delete the existing criteria that are not relevant to their business. For more information about pricing criteria, see “Configuring Pricing Criteria” on page 9.

This task is a step in “Process of Creating Pricing Strategies” on page 7.

To create a pricing criterion

1 Navigate to the Administration - Deal Management screen > Profile Framework view.

  The Profile Framework list appears. This list contains fields for the current criteria.

2 Create a new criterion, and complete the fields as appropriate. The following table describes some fields.

Field	Description
LOV	Select the name of the list of values that is associated with the criterion. This field is not required.
Criteria Category	Select the category for the criterion. If you select a category of Primary, the criterion is available for selection in a customer account and a pricing segment. If you select Conditional-Deal Specific, the criterion is available for selection in a pricing strategy, a quote header, and an order header.
Active	If you select this field to place a check mark in the check box, this criterion is available for selection in the appropriate application screens after you configure the pricing criteria. For more information, see "Configuring Pricing Criteria" on page 9.

Configuring Pricing Criteria

You must use Siebel Tools to configure the new pricing criteria that you create. After you configure the new primary criteria, these criteria display as follows:

- As column headings in the Pricing Segments view in the Administration - Deal Management screen
- As column headings in the Account Pricing Segment Profile view in the Administration - Deal Management screen
- As form field names in the Account Pricing Segment Profile view in the Accounts screen

If you delete the pricing criteria, you must use Siebel Tools to remove those pricing criteria from the application screens.

This task is a step in "Process of Creating Pricing Strategies" on page 7.

To configure new primary criteria

1 Log in to Siebel Tools as an administrator.

2 Modify the Pricing Segments view:

   a In Object Explorer, navigate to Table, lock the S_PRICSEGDEF table, navigate to Table > Column, and add a new column for the new primary criterion.

   Instead of adding a completely new column, you can customize columns DM_CRITERIA_09 through DM_CRITERIA_13.

   b Click Apply/DDL to apply the table change to the physical schema.

   c Navigate to Business Component, lock the DealMgmt Pricing Segment Def business component, navigate to Business Component > Field, and add a new field for the new primary criterion.

   d Navigate to Applet, lock the DealMgmt Segment Definition List Applet, and expose the new field.

3 Modify the Account Pricing Segment Profile view:

   a In Object Explorer, navigate to Table, lock the S_ORG_EXT_DM table, navigate to Table > Column, and add a new column for the new primary criterion.

   Instead of adding a completely new column, you can customize columns DM_CRITERIA_09 through DM_CRITERIA_13.

   b Click Apply/DDL to apply the table change to the physical schema.

   c Navigate to Business Component, lock the Account business component, and navigate to Business Component > Field:

      ❑ Add a new field for the new primary criterion (for example, *xxx*, where *xxx* is the name of the new field).

      ❑ Add a second new field for the new primary criterion with a name of Parent *xxx,* select Parent S_ORG_EXT_DM in the Join field, and select *xxx* in the Column field.

   d Navigate to Business Component > Business Component User Prop, and add the user property names and corresponding values in the following table.

Name	Value
Field Read Only Field:*xxx*	Deal Ineligible
On Field Update Set N	"*xxx*", "Price Segment", " " N in the field name is the next available number.
On Field Update Set N	"Deal Eligible", "*xxx*", "If ([Deal Eligible] = ""N"" AND [Parent Account Id] IS NOT NULL, [Parent *xxx*], [*xxx*])" N in the field name is the next available number.
On Field Update Set N	"Parent Account Name", "*xxx*", "If ([Deal Eligible] = ""N"" AND [Parent Account Id] IS NOT NULL, [Parent *xxx*], [*xxx*])" N in the field name is the next available number.

   e Navigate to Applet, lock the DealMgmt Account List Applet, and expose the new field. Lock the DealMgmt Strategy Entry Applet, and expose the new field.

4 Compile the objects for your changes into the Siebel Repository file (SRF).

5 Unlock the objects.

After you configure the new conditional-deal specific criteria, these criteria display as column headings in the Pricing Strategy Definition view in the Administration - Deal Management screen. They display as field names in header records in the Quotes screen and the Sales Orders screen.

To configure new conditional-deal specific criteria

1 Log in to Siebel Tools as an administrator.

2 Modify the Pricing Strategy Definition view:

   a. In Object Explorer, navigate to Table, lock the S_DM_STRATEGY table, navigate to Table > Column, and add a new column for the new conditional-deal specific criterion.
   b. Click Apply/DDL to apply the table change to the physical schema.
   c. Navigate to Business Component, lock the DealMgmt Strategy business component, navigate to Business Component > Field, and add a new field for the new conditional-deal specific criterion.
   d. Navigate to Applet, lock the DealMgmt Strategy List Applet, and expose the new field. Lock the DealMgmt Strategy Entry Applet, and expose the new field.

3. Modify the Quotes screen:
   a. In Object Explorer, navigate to Table, lock the S_DOC_QUOTE_DM table, navigate to Table > Column, and add a new column for the new conditional-deal specific criterion.
   b. Click Apply/DDL to apply the table change to the physical schema.
   c. Navigate to Business Component, lock the Quote business component, navigate to Business Component > Field, and add a new field for the new conditional-deal specific criterion.
   d. Navigate to Applet, lock the Catalog Quote Header Form Applet, and expose the new field. Lock the Quote Form Applet, and expose the new field. Lock the Quote Entry Applet, and expose the new field.
4. Modify the Sales Orders screen:
   a. In Object Explorer, navigate to Table, lock the S_ORDER_DM table, navigate to Table > Column, and add a new column for the new conditional-deal specific criterion.
   b. Click Apply/DDL to apply the table change to the physical schema.
   c. Navigate to Business Component, lock the Order Entry - Orders business component, navigate to Business Component > Field, and add a new field for the new conditional-deal specific criterion.
   d. Navigate to Applet, lock the Catalog Order Header Form Applet, and expose the new field. Lock the Order Entry - Order Form Applet Dashboard (Sales) applet, and expose the new field. Lock the Order Entry - Order Form Applet (Sales) applet, and expose the new field.
5. Compile the objects for your changes into the Siebel Repository file (SRF).
6. Unlock the objects.

Defining Pricing Segments

Pricing segments represent groups of customer accounts. These groups are based on the common buying and purchasing behavior of the customers in the group. Similar pricing policies apply to the customer accounts in a pricing segment. Although a customer account can apply to more than one pricing segment, you must associate each customer account with only one pricing segment. For more information, see "Associating Accounts with Pricing Segments" on page 21.

When you define pricing segments, you select an available value for each of the criteria with a value of Primary in the Criteria Category field on the Administration - Deal Management screen > Profile Framework view. Although pricing segment definitions can designate some of the same customer accounts, each pricing segment definition must designate a unique set of customer accounts. You select a pricing segment and other elements when you define a pricing strategy.

NOTE: After the pricing strategy that contains a pricing segment is associated with quotes and orders, do not change the data in that pricing segment. If you change this data, the pricing policies for open quotes and orders might change. Instead of changing this data, you can copy and modify the pricing segment, and include the new pricing segment in a new pricing strategy. Sales representatives then select the new pricing strategy in the new quotes and orders.

This task is a step in "Process of Creating Pricing Strategies" on page 7.

To create pricing segments

1. Navigate to the Administration - Deal Management screen > Pricing Segments view.

   The Pricing Segments list appears, and the primary criterion fields display as field headings in the list.

2. Create a new pricing segment, and complete the fields as appropriate:

   a. Enter the name of the pricing segment in the Name field.

   b. Select a value for each of the primary criterion fields.

      You can exclude a primary criterion field from a pricing segment by selecting no value for that field. When you select no value, all the values in the primary criterion field are included in the pricing segment, so the primary criterion field does not determine the specific customers who are included in the pricing segment.

Creating Guideline Plans

Guideline plans determine the pricing adjustments that sales representatives are allowed to negotiate when creating quotes and orders. The pricing for a guideline plan can apply to a line item in a quote, to a line item in an order, or to the entire quote or order. A *deal* is an entire quote or order. You select guideline plans and other elements when you define a pricing strategy. The pricing in a guideline plan applies to waterfalls. For more information, see "About Waterfalls" on page 17.

NOTE: After the pricing strategy that contains a guideline plan is associated with quotes and orders, do not change the data in that guideline plan. If you change this data, the pricing policies for open quotes and orders might change. Instead of changing this data, you can copy and modify the guideline plan, and include the new guideline plan in a new pricing strategy. Sales representatives then select the new pricing strategy in the new quotes and orders.

This task is a step in "Process of Creating Pricing Strategies" on page 7.

To create a guideline plan

1. Navigate to the Administration - Deal Management screen > Guideline Plan view.

   The Guideline Plan list appears, and a terms list appears below the Guideline Plan list.

2. In the Guideline Plan list, create a guideline plan, and complete the fields as appropriate. The following table describes a field.

Field	Description
Type	Select the type of guideline plan. If you select the Product type, the Line Item Terms list appears below the Guideline Plan list. If you select the Deal type, the Deal Terms list appears below the Guideline Plan list.

3. If the Line Item Terms list appears below the Guideline Plan list, create the pricing terms for the line item guideline plan, and complete the fields as appropriate. The following table describes some fields.

Field	Description
Sequence	The sequence number for the line item term. If multiple terms that apply to a quote or an order are found, then the term with the lowest sequence number determines the pricing adjustment that the sales representative can negotiate for that quote or order. For more information about term selection logic, see "Term Selection Logic" on page 18.
Role	The role of the user who can negotiate pricing for a quote and order. If you select no value, the pricing term for the line item applies to all users.
Territory	The geographic area for the customer account on the quote or order. The values that you can select for this field are the same values that you can select for the Region field (not the Territories field) in the Accounts screen > More Info view. If you select no value, the pricing term for the line item applies to all territories.

Field	Description
Constraint Type	The nature of a price exception for the pricing term: ■ If you select Constraining, the sales representative sees a red square in the GL field after entering a price for a quote or an order that is lower than or equal to the minimum price that is associated with the pricing term for the line item. ■ If you select Recommended, the sales representative sees a yellow square in the GL field after entering a price for a quote or an order that is lower than or equal to the minimum price that is associated with the pricing term for the line item. If a quote line item has a red square, the sales representative cannot convert the quote to an order until a price approver handles the price exception. A red square indicates that the sales representative violated a pricing policy. A yellow square is a cautionary indicator and does not prevent the sales representative from further processing the quote or order.
Product	The product for the pricing term. If you select no value, the pricing term for the line item applies to all products.
Product Line	The product line for the product. If you select no value, the pricing term for the line item applies to all products lines.
Product Class	The product class for the product. If you select no value, the pricing term for the line item applies to all product classes.
Reference Waterfall Segment	The waterfall segment to which the pricing term applies. The price that is associated with the pricing term for this waterfall segment is compared to the price for the impacted waterfall segment on a quote or an order. If the price that is associated with the pricing term for this waterfall segment is higher than or equal to the price for the impacted waterfall segment, a price exception results. For example, assume the Reference Waterfall Segment is Ceiling, the pricing term is a 15% discount, and the Impacted Waterfall Segment is Invoice. Also, assume that the pricing engine calculates the ceiling price for a quote as $100 and the invoice price as $90. If a sales representative adjusts the invoice price on that quote to $80, a price exception results because $80 is less than $85 ($100 less a 15% discount). By default, the values in this field include Ceiling and Segment. When price administrators configure waterfall segments, they can configure other values. For information about configuring waterfall segments, see *Siebel Pricing Administration Guide*.

Field	Description
Impacted Waterfall Segment	The price on this waterfall segment on a quote or an order price is compared to the price that is associated with the pricing term for the reference waterfall segment. By default, the values for this field include Invoice, Pocket, and Pocket Margin. When price administrators configure waterfall segments, they can configure other values. For information about configuring waterfall segments, see *Siebel Pricing Administration Guide*.
Start Date	The date and time the pricing term begins.
End Date	The date and time the pricing term ends.
Adjustment Type	The nature of the adjustment for the pricing term. Values include: % Discount and Price Override.
Term	The value that is associated with the adjustment.

4 If the Deal Terms list appears below the Guideline Plan list, create pricing terms for the deal guideline plan, and complete the fields as appropriate. The following table describes some fields.

Field	Description
Sequence	The sequence number for the deal term. If multiple terms that apply to a quote or an order are found, then the term with the lowest sequence number determines the pricing adjustment that the sales representative can negotiate for that quote or order. For more information about term selection logic, see "Term Selection Logic" on page 18.
Role	The role of the user who can negotiate pricing for a quote and order. If you select no value, the pricing term for the deal applies to all users.
Territory	The geographic area for the customer account on the quote or order. The values that you can select for this field are the same values that you can select for the Region field (not the Territories field) in the Accounts screen > More Info view. If you select no value, the pricing term for the deal applies to all territories.

Field	Description
Constraint Type	The nature of a price exception for the pricing term: - If you select Constraining, the sales representative sees a red square in the GL field after entering a price for a quote or an order that is lower than or equal to the minimum price that is associated with the pricing term for the deal. - If you select Recommended, the sales representative sees a yellow square in the GL field after entering a price for a quote or an order that is lower than or equal to the minimum price that is associated with the pricing term for the deal. If a quote line item has a red square, the sales representative cannot convert the quote to an order until a price approver handles the price exception. A red square indicates that the sales representative violated a pricing policy. A yellow square is a cautionary indicator and does not prevent the sales representative from further processing the quote or order.
Reference Waterfall Segment	The waterfall segment to which the pricing term applies. The price that is associated with the pricing term for this waterfall segment is compared to the price for the impacted waterfall segment on a quote or an order. If the price that is associated with the pricing term for this waterfall segment is higher than or equal to the price for the impacted waterfall segment, a price exception results. For example, assume the Reference Waterfall Segment is Ceiling, the pricing term is a 15% discount, and the Impacted Waterfall Segment is Invoice. Also, assume that the pricing engine calculates the ceiling price for a quote as $100 and the invoice price as $90. If a sales representative adjusts the invoice price on that quote to $80, a price exception results because $80 is less than $85 ($100 less a 15% discount). By default, the values in this field include Ceiling and Segment. When price administrators configure waterfall segments, they can configure other values. For information about configuring waterfall segments, see *Siebel Pricing Administration Guide*.
Impacted Waterfall Segment	The price on this waterfall segment on a quote or an order price is compared to the price that is associated with the pricing term for the reference waterfall segment. By default, the values for this field include Invoice, Pocket, and Pocket Margin. When price administrators configure waterfall segments, they can configure other values. For information about configuring waterfall segments, see *Siebel Pricing Administration Guide*.
Start Date	The date and time the pricing term begins.
End Date	The date and time the pricing term ends.
Deal Min	The lowest value in the deal value range.

Field	Description
Deal Max	The highest value in the deal value range.
Term	The percentage that is associated with the deal value range.

About Waterfalls

A *waterfall* is a list of the adjustments that are used to calculate the final price for a quote or an order line item. These adjustments can consist of adjustments that the pricing engine calculates and adjustments that the sales representative enters. The sales representative displays a waterfall by clicking the Invoice Price field for a line item in a quote or an order. A window appears with information about the adjustments that are applicable to each segment in the waterfall.

A waterfall consists of waterfall segments. *Waterfall segments* include:

- **Ceiling.** The highest published price for a quote, an order, or line item in a quote or an order. A company offers this price to all customers. The ceiling flag in a price list identifies the ceiling prices. For information about setting up ceiling prices, see "Setting Up Ceiling Prices" on page 17.
- **Segment.** The price that a company offers to the customers in a pricing segment for a quote, an order, or line item in a quote or an order. These customers are sometimes referred to as preferred customers. A segment price is sometimes referred to as a customer list price or a start price. The segment price is obtained from the price list.
- **Invoice.** The price that the customer pays for a quote, an order, or line item in a quote or an order. The invoice price is calculated by subtracting the negotiated discounts, volume discounts, and other on-invoice discounts from the segment price.
- **Pocket price.** The final price that a company realizes for a quote, an order, or line item in a quote or an order. A company pockets this price. The pocket price is calculated by subtracting off-invoice adjustments (for example, volume rebates, channel rebates, warranty costs, price protection plans, and marketing funds) from the invoice price.
- **Pocket margin.** The price that is associated with the profit that the company realizes for a quote, an order, or line item in a quote or an order. The pocket margin is calculated by subtracting the cost from the pocket price. For more information about cost prices, see *Siebel Pricing Administration Guide*.

Administrators can configure the waterfall segments that are appropriate for their business. Administrators must associate waterfall segments with the waterfall calculation logic in the pricing procedure. For information about configuring waterfall segments and about pricing in general, see *Siebel Pricing Administration Guide*.

Setting Up Ceiling Prices

Price administrators can set up ceiling prices by designating a price list for ceiling prices.

NOTE: Do not set up ceiling prices for more than one price list.

To set up ceiling prices

1. Navigate to the Administration Pricing screen > Price Lists view.

2 Select the price list for which you want to designate ceiling prices.

3 Select the Ceiling Price field to place a check mark in the check box.

Term Selection Logic

When a guideline plan contains multiple terms, Siebel Deal Management uses the following logic to select the line item term or the deal term that is applicable to a quote or an order:

1 For line item terms, select the terms with a product that is the same as the product on the quote or order:

   a If no such product terms exists, select the terms with the product line for the product on the quote or order.

   b If no such product line terms exists, select the terms with the product class for the product on the quote or order.

2 For deal terms, select the terms for which the term value range includes the deal value for the quote or order.

3 From the line item terms or deal terms that are selected in the previous steps, select the term for which:

   a The role and territory are the same as the role and territory for the quote or order.

   b The start date is before the effective date for the quote or order.

4 If no term is selected in the previous step, select the term for which:

   a The role is the same as the role for the quote or order.

   b The start date is before the effective date for the quote or order.

5 If no term is selected in the previous step, select the term for which:

   a The territory is the same as the territory for the quote or order.

   b The start date is before the effective date for the quote or order.

6 If no term is selected in the previous step, select the term for which the start date is before the effective date for the quote or order.

7 If the previous steps in this logic result in the selection of more than one term, then select the term with the lowest sequence number.

Configuring Term Selection Logic

Price administrators can configure the term selection logic. For information about the logic that Siebel Deal Management uses to select terms, see “Term Selection Logic” on page 18.

To configure term selection logic

1 Log in to Siebel Tools as an administrator.

2 In Object Explorer, navigate to Workflow Process, select the Dynamic Pricing Procedure - Deal Management workflow, and lock the workflow.

3. Navigate to Workflow Process > WF Step.
4. To configure term selection logic for line items:
    a. Select the DM Set Line Item Guideline step, navigate to Workflow Process > WF Step > WF Step I/O Argument, select the Search Specification input argument, and change the expression in the Value field.
    b. Navigate to Workflow Process > WF Step, select the DM Load Guideline step, navigate to Workflow Process > WF Step > WF Step I/O Argument, select the Sort Specification input argument, and change the expression in the Value field.
5. To configure term selection logic for deals:
    a. Select the DM Set Deal Guideline Status step, navigate to Workflow Process > WF Step > WF Step I/O Argument, select the Search Specification input argument, and change the expression in the Value field.
    b. Navigate to Workflow Process > WF Step, select the DM Load Guideline step, navigate to Workflow Process > WF Step > WF Step I/O Argument, select the Sort Specification input argument, and change the expression in the Value field.
6. Compile the object for your changes into the Siebel Repository file (SRF).
7. Unlock the object.

Defining Pricing Strategies

Pricing strategies are the pricing policies for a business. After you create the pricing strategy elements, such as criteria, pricing segments, line item guideline plans, deal guideline plans, and price lists, you are ready to use these elements to define a pricing strategy. You can also assign adjustments to that pricing strategy.

NOTE: After the pricing strategy that contains a price list is associated with quotes and orders, do not change the data in that price list. If you change this data, the pricing policies for open quotes and orders might change. Instead of changing this data, you can copy and modify the price list, and include the new price list in a new pricing strategy. Sales representatives then select the new pricing strategy in the new quotes and orders.

This task is a step in "Process of Creating Pricing Strategies" on page 7.

To define a pricing strategy

1. Navigate to the Administration - Deal Management screen > Pricing Strategy Definition view.

    The Strategy Definition list appears.

2. (Optional) If you want to copy and then modify an existing strategy definition, select that strategy definition, and click Revise.

    A copy of the existing strategy definition with a new version number appears in the Strategy Definition list. You cannot change the strategy name, segment name, and version number for this copied strategy definition.

3 Create the pricing strategy, and complete the fields as appropriate. The following table describes some fields.

Field	Description
Active	After you enter data in the pricing strategy fields, select this field to place a check mark in the check box. When this field is checked for a pricing strategy, sales representatives can select that strategy when creating quotes and orders, and you cannot change the data in the fields for that strategy.
Revision	The version number that is populated automatically for the pricing strategy. Pricing strategies that you create from scratch are populated with a version number of 1. The first pricing strategy that you create by clicking the Revision button is populated with a version number of 2. Subsequent pricing strategies that you create by clicking the Revision button are populated with a version number of 3, 4, and so on.
Segment Name	The name of the pricing segment for the pricing strategy. For more information about pricing segments, see "Defining Pricing Segments" on page 11.
Start Date	The date and time the pricing strategy begins.
End Date	The date and time the pricing strategy ends.
Price List Name	The name of the price list for the pricing strategy. If this price list contains ceiling prices, this list designates ceiling prices. If this price list does not contain ceiling prices, this list designates segment prices. For more information about price lists, see *Siebel Pricing Administration Guide*.
Deal Guideline Name	The name of the deal guideline plan for the pricing strategy. For more information about deal guideline plans, see "Creating Guideline Plans" on page 12.
Product Guideline Name	The name of the line item guideline plan for the pricing strategy. For more information about line item guideline plans, see "Creating Guideline Plans" on page 12.

4 Select a value for each of the conditional-deal specific criteria fields. For more information about conditional-deal specific criteria, see "Creating Pricing Criteria" on page 8.

5 To set up the adjustments for the pricing strategy, click the Strategy Definition Adjustments view tab, and select an adjustment type in the Name field.

The Type field and the Discount Matrix Type field are automatically populated.

Associating Accounts with Pricing Segments

When creating a quote or an order, a sales representative selects a customer account and conditional-deal specific criteria. The sales representative then selects a pricing strategy. The pricing strategies that are available for selection are those strategies that include the pricing segment to which the customer is assigned. The guideline plans in a pricing strategy determine the pricing adjustments that the sales representative is allowed to negotiate. Thus, you must associate a customer account with a pricing segment so that the application can determine the pricing adjustments that the sales representative is allowed to negotiate for that customer.

A customer account can apply to more than one pricing segment. For example, if a customer account has a value of Distributor in the Channel field, that customer account can apply to a pricing segment with a value of Distributor in the Channel field and to a second pricing segment with no value in the Channel field. (A primary criterion field with no value indicates all possible values.) You use the Account Pricing Segment Profile view to associate each customer account with only one pricing segment. You cannot add new records to this view. You can associate only the existing accounts in this view to a pricing segment.

The child accounts in the Account Pricing Segment Profile view inherit the view data from their parent account if the Deal Negotiation Eligible field for the child account is not checked. If you change the data in a parent account, the child account displays that changed parent data after you access the view again, enter a check in the Deal Negotiation Eligible field for the child account, step off the record, clear the check that you entered, and step off the record.

To associate an account with a pricing segment

1. Navigate to the Administration - Deal Management screen > Account Pricing Segment Profile view.

   The list of account pricing profiles appears.

2. Select the account pricing profile that contains the customer account that you want to associate with a pricing segment, and complete the fields as appropriate:

   a. If you want the sales representative to be able to negotiate pricing when the sales representative enters quotes or orders, select the Deal Negotiation Eligible field to place a check mark in the check box.

      Enter a check in the Deal Negotiation Eligible field for a child account to change the data that the child account inherits from the parent account. When you enter a check in this field, the relationship between the child account and the parent account terminates. If you want to automatically change the data back to the data that the child account inherits from the parent account, clear the check from this field.

   b. Select a value for each of the primary criterion fields.

      You can exclude a primary criterion field from a pricing segment by selecting no value for that field. When you select no value, all the values in the primary criterion field are included in the pricing segment, so the primary criterion field does not determine the specific customers who are included in the pricing segment.

  c. Select the segment name for the customer account.

     The selected primary criterion fields determine the segments that are available for selection. If you change a value in a primary criterion field, you must select a pricing segment again.

NOTE: Alternatively, you can navigate to the Accounts screen > Accounts List view, click the Name field for the customer account that you want to associate with a pricing segment, click the Account Pricing Segment Profile view tab, and complete the fields in the Account Pricing Segment Profile form.

Process of Configuring Workbench

Price administrators configure Workbench when they implement Siebel Deal Management. They rarely, if ever, change this configuration.

To configure Workbench, price administrators perform the following tasks:

- Mapping Deal Statuses to Workbench Statuses on page 22
- Configuring the Price Score Calculation on page 23
- Configuring Fields in Workbench on page 23
- Changing Labels in Workbench on page 23

Mapping Deal Statuses to Workbench Statuses

A quote or an order can have various statuses that describe its state in business processing. In Workbench, a quote or an order is called a deal. A deal can have the following statuses:

- **APPROVED.** A quote or an order that a user approved.
- **LOST.** A quote or an order that the customer or the company did not accept.
- **WON.** A quote that the customer accepted.
- **WON - ORDERS.** An order that was shipped.

Price administrators must map some of the quote and order statuses that their business uses to a status in Workbench so that quote and order data is available for analysis in Workbench. Do not map the quote and order statuses that do not apply to a status in Workbench. For example, the In Process status does not apply to a status in Workbench.

This task is a step in "Process of Configuring Workbench" on page 22.

To map a deal status to a workbench status

1. Navigate to the Administration - Deal Management screen > Workbench Admin view.
2. Create a record to map a deal status to a workbench status:
   a. Select a value in the Deal Status field.
   b. In the Workbench Status field, select the status to which you want to map the deal status value.

Configuring the Price Score Calculation

The price score calculation includes variables for the price proximity and margin percentage. For more information about the price score calculation, see *Siebel Deal Management Workbench User Guide*. Price administrators can set up the percentage weight of the price proximity and margin percentage in the price score calculation. The percentage weight of these two variables must add up to 100.

This task is a step in "Process of Configuring Workbench" on page 22.

To configure the price score calculation

1. Navigate to the Administration - Deal Management screen > Workbench Admin view.
2. If necessary, scroll down to the Scoring & Defaults section.
3. Enter a value between 0 and 100 for the Price Proximity Score field and the Margin Percent Score field.

   NOTE: The total of these two fields must equal 100.

Configuring Fields in Workbench

If the ceiling waterfall segment does not apply to a business, price administrators can hide this field from Workbench. Also, price administrators can configure the default value that appears in the analysis fields containing time intervals in Workbench. Price approvers can change this default value to a different time interval when evaluating the data in Workbench.

This task is a step in "Process of Configuring Workbench" on page 22.

To configure the fields in Workbench

1. Navigate to the Administration - Deal Management screen > Workbench Admin view.
2. If necessary, scroll down to the Scoring & Defaults section.
3. To hide the Ceiling Waterfall Segment field from Workbench, select False in the Enable Ceiling Waterfall Segment field.
4. To configure the default value that appears in the analysis fields containing the time intervals in Workbench, select a value in the Default Analysis Time Period field.

Changing Labels in Workbench

Price administrators can change the labels that appear for the fields in Workbench to accommodate their business requirements. For example, if a company uses the term List Price instead of the term Segment Price, price administrators can change the Segment Price field in Workbench to display as List Price. You cannot add new fields to Workbench. You can change only the labels for the existing fields.

This task is a step in "Process of Configuring Workbench" on page 22.

To change labels in Workbench

1. Navigate to the Administration - Deal Management screen > Workbench Admin view.
2. Click the Labels view tab.

   If you are initially implementing Siebel Deal Management, no values appear in the Workbench Label column and in the New Label column.

3. If you are initially implementing Siebel Deal Management, enter the values in the following table in the Workbench Label column and in the New Label column.

Workbench Label	New Label
ACTUALS	Actuals
APPROVED	Approved
CEILING	Ceiling
COMMITMENTS	Commitments
CUSTOMER	Account
DEAL	Deal
DEAL_TABLE_QUOTED_HEADER	Quoted
INVOICE	Invoice
IP	IP
LIST	Segment
Loss	Loss
LOST	Lost
PM	PM
POCKET	Pocket
PP	PP
PRICE_SCORE	Price Score
PRODUCT	Product
QUANTITY	Quantity
RECOMMENDED	Recommended
WON	Won

   NOTE: Although the value that you enter in the Workbench Label column displays the New Label column by default, change the value in the New Label column to the value in this table.

4. For the labels in Workbench that you want to change, change the value in the New Label field.

3 Pricing for Deal Negotiation

This chapter provides information about the pricing process when users create deals (quotes and orders) in Siebel Deal Management. It includes the following topics:

- About Pricing for Deal Negotiation on page 27
- Creating and Pricing a Quote on page 27
- Reviewing Price Exceptions for a Quote on page 30
- Accessing Workbench to Assess a Quote on page 30

About Pricing for Deal Negotiation

When a user creates a quote or an order, the user can manually adjust the prices that are automatically assigned to that quote or order. The pricing strategy and the conditional-deal specific criteria that the user selects for a quote or an order determine the prices that are automatically assigned to that quote or order.

If, as a result of the manual adjustments that the user enters, the quote or order pricing does not comply with the pricing policies, the user must contact a price approver to review the price exceptions. The price approver can make recommendations to the user regarding the required changes to price, product mix, and adjustments for the quote or order. The price approver can also access Workbench to obtain more information to assess a price exception for a quote.

Creating and Pricing a Quote

Users can start a new quote from a number of screens:

- If you start the quote from the Accounts screen or the Contacts screen, the account or contact information is automatically populated in the quote. If a price list is associated with the account, this price list name is also automatically populated in the quote.
- If you start the quote from the Quotes screen, you must enter the account and contact information manually.

NOTE: The tasks for entering quote and order information are essentially the same. To create an order, navigate to the Sales Orders screen > List view.

Creating an order that is based on a quote allows you to check the quote for any errors. If you are creating a complicated order that might have errors, create a quote, verify the quote, and then convert the quote to an order. For more information about creating quotes and sales orders, see *Siebel Order Management Guide*.

To create and price a quote from the Quotes screen

1. Navigate to the Quotes screen > List view.
2. In the quotes list, add a new record. The information for the fields in the following table is automatically populated.

Field	Description
Quote #	Displays a unique system-generated number for the quote.
Revision	Displays a number indicating the version of the quote. When you create a new quote, this number is 1.
Created	Displays the date that you create the quote.
Active	Displays a check mark in the check box to indicate that the quote is active. **NOTE:** A quote must be active to attach files to it or update it.
Status	Displays the initial status (In Progress) of the quote. This status can change as the quote process continues. For example, if you convert the quote to an order, the status changes to Order Placed. Your company can set up other statuses. Some of the statuses that companies use include: Active, Approved, Placed, Rejected, and Expired.
Effective As Of	Displays the date that you create the quote. You can change this date.
Effective Through	Displays the effective date of the quote plus 30 days. You can change this date.
Currency	Displays the default currency for the quote. You can change this currency.

3. Enter a name for the quote in the Name field.
4. Drill down on the link in the name field to enter information in the header fields for the new quote:

   a. (Optional) Select an opportunity for the quote in the Opportunity field.

      An account that is associated with this opportunity is automatically selected, but you can change this account selection.

   b. If necessary, select the account for the quote.

      The read-only Price Segment field is automatically populated with the segment that is associated with the account. For more information about the association between accounts and pricing segments, see "Associating Accounts with Pricing Segments" on page 21.

   c. Select a contact for the quote in the Last Name field, and enter a due date for the quote in the Due field.

   d. Select conditional-deal specific details for the quote.

      For example, you can select a competitor in the Competitor field. For more information about conditional-deal specific criteria, see Creating Pricing Criteria on page 8.

e. Select a pricing strategy for the quote in the Strategy field.

   The pricing strategies that satisfy your account and conditional-deal specific designations are available for selection.

   The read-only Price List field is automatically populated based on the price strategy that you select. The pricing procedure automatically applies to the quote the price guidelines that are associated with this strategy. For more information about pricing strategies, see "Defining Pricing Strategies" on page 19.

5. Click the Line Items view tab to enter information in the line item fields for the new quote:

   a. In the line items list, add line items for the products to include in the quote, and enter a quantity for each product.

   b. Navigate to Menu > Reprice All.

      The pricing segment fields for the line items are automatically populated.

   c. Click the link in the Invoice field for a line item to view more information about the segments in the pricing waterfall. For more information about waterfall segments, see "Creating Guideline Plans" on page 12.

6. In response to the customer's pricing expectations during the negotiation process, adjust the prices for the quote:

   a. For a line item, you can enter a discount in the Manual Discount % field and in the Manual Discount Amount field. You can also click Spread Discount in the Line Items > Totals view to apply a discount to selected line items.

   b. For the entire quote, you can enter a discount in the header record in the Discount field.

   c. Navigate to Menu > Reprice All.

      The pricing segment fields for the line items are automatically updated to reflect the discounts that you enter.

      NOTE: If you want to readjust the prices for the quote, you can repeat Step 6 as often as needed.

7. Review the GL (guideline) field for the line items and GL field for the whole quote to determine pricing policy compliance:

   - If all the GL fields are green, the quote pricing complies with pricing policies. You can convert the quote to an order.

   - If any of the GL fields are not green, the quote does not comply with pricing policies. Notify the price approver of the pricing exception.

     NOTE: If a GL field for a line item is not green, the GL field for the whole quote is also not green, even if the deal guideline is not violated.

     For more information about the GL fields, see "Accessing Workbench to Assess a Quote" on page 30.

Reviewing Price Exceptions for a Quote

If a quote has a red GL (guideline) field, the user cannot convert the quote to an order. For quotes and orders that have these price exceptions, the price approver must take some action. The price approver can make recommendations to the deal originator regarding the required changes to price, product mix, and adjustments for the quote or order.

When a price approver accesses a quote or an order, the GL fields show the pricing policy compliance according to the pricing authority of the deal originator. In the Line Items view for a quote or an order, the price approver can navigate to Menu > Reprice All to update the GL fields to show the pricing policy compliance according to the price approver's authority. If the price approver has more pricing authority than the deal originator, the red and yellow GL fields can change to green. By repricing, the price approver accepts the quote or order without changing any data in it.

After reviewing a quote, the price approver can launch Workbench to find more information to assess a price exception for a quote. For more information about launching Workbench, see "Accessing Workbench to Assess a Quote" on page 30.

NOTE: The tasks for reviewing price exceptions for a quote and an order are essentially the same. To view an order, navigate to the Sales Orders screen > List view.

To review price exceptions for a quote

1. Navigate to the Quotes screen > List view.
2. Drill down on the link for the name of the quote that you want to review.

   Information in the quote header appears.
3. Click the Line Items view tab to view information in the line item fields for the quote.
4. To view more information about the price exceptions:
   - Review the descriptions in the Line Item Violation Text field for the line items.
   - Click Verify in the header record to view descriptions of the price exceptions.

     A window appears showing the price exception messages and the other messages that are related to the quote. To get a better view of all messages, click the icon at the top of the scroll arrows to expand the window.
   - Click the link in the Invoice field for a line item in a quote (or the Net Price field for a line item in an order) to view more information about the segments in the waterfall.

     A window appears showing the waterfall for the line item. The last line of the waterfall shows the minimum price for the line item if a guideline price applies to the line item. For more information about waterfall segments, see "Creating Guideline Plans" on page 12.

Accessing Workbench to Assess a Quote

Siebel Deal Management flags each line item in a proposed deal indicating whether the proposed price is within the established pricing guidelines. Under the GL (guideline) column, Siebel Deal Management places one of the following flags in each deal item:

- **Red square.** The proposed price is at or below the minimum, constraining guideline.
- **Yellow square**. The proposed price is at or below the recommended guideline.
- **Green square.** The proposed price is above all constraining and recommended guidelines.

Siebel Deal Management also indicates the word for the color in the Guideline Status field. For more information about constraining and recommended guidelines, see "Creating Guideline Plans" on page 12.

When Siebel Deal Management flags a proposed deal line item as below the guideline price, the deal originator must adjust the pricing or request assistance from the price approver for a price exception or guidance about a better price.

Then the price approver can go directly from viewing an exception line item on the Quotes screen in Siebel Deal Management to Workbench to evaluate how good or bad the deal is relative to the pricing segment.

Workbench provides real-time sales analytics to help pricing approvers examine a line item on a deal so that they can quickly and effectively assess the deal and the impact to profitability. An organization can also have sales representatives use Workbench to perform market analysis and determine effective pricing before deals are routed to a price approver. For more information about Workbench, see *Siebel Deal Management Workbench User Guide*.

To access Workbench to assess a quote

1. Navigate to the Quotes screen > List view.
2. Drill down on the link for the name of a quote.

   Information in the quote header appears.

3. Click the Line Items view tab to view information in the line item fields for the quote.
4. Select the line item that you want to analyze in Workbench, and click Workbench.

   Workbench is launched in a separate browser. Workbench can display graphical waterfall, variability analysis, trends analysis, and customer purchase history.

   By default, Workbench analytics include only deals in which the item is sold in the same product configuration as the current deal. If the current line item is sold in additional configurations, you can optionally include those deals in Workbench analytics. Including those deals creates a larger sample that might provide data helpful in pricing the current deal.

5. Close the Workbench browser when you are finished using Workbench.

4

Siebel Deal Management Workflows

This chapter describes the changed and new workflows for Siebel Deal Management. It includes the following topics:

- Changed Workflows for Siebel Deal Management on page 33
- New Workflows for Siebel Deal Management on page 36

Changed Workflows for Siebel Deal Management

The following workflows changed for Siebel Deal Management:

- Verify Header (Quote) on page 33
- Verify Header (Order) on page 34
- Pricing Procedure - Calculate Net Price on page 35

Verify Header (Quote)

The Verify Header (Quote) workflow, shown in Figure 1, is used to verify a quote, verify a promotion, and verify line items of a quote. It displays promotion violations, data validation rule violations, and complex product violations.

This workflow is called when the user clicks the Verify button in a quote header or selects Verify from the menu of the quote line item applet. For more information about the other workflows that this workflow calls, see *Siebel Order Management Guide*.

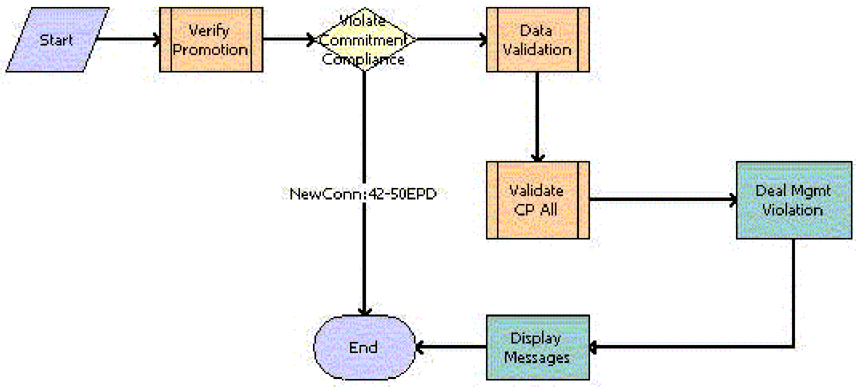
Start
Verify Promotion
Violate Commitment Compliance
Data Validation
NewConn:42-50EPD
Validate CP All
Deal Mgmt Violation
End
Display Messages

Figure 1. Verify Header (Quote) Workflow

Workflow Description. This workflow does the following:

1. **Verify Promotion.** Calls the ISS Promotion Verify SubProcess workflow to verify promotion status.
2. **Validate Commitment Compliance.** Determines if a commitment for the promotion is broken.
3. **Data Validation.** If no commitment is broken, calls the ISS Validation (Quote) workflow to verify the data validation rules.
4. **Validate CP All.** Calls the VORD Validate Complex Product All (Quote) workflow to validate all complex products under the quote.
5. **Deal Mgmt Violation.** Calls the GetDealMgmtViolationText business service method and passes the violation messages for quotes to the next step.
6. **Display Messages.** Displays all messages generated by the previous steps.

Verify Header (Order)

The Verify Header (Order) workflow, shown in Figure 2, is used to verify an order, verify a promotion, and verify the line items of an order. It displays promotion violations, data validation rule violations, and complex product violations.

This workflow is called when the user clicks the Verify button in an order header or selects Verify from the menu of the order line item applet. For more information about the other workflows that this workflow calls, see *Siebel Order Management Guide*.

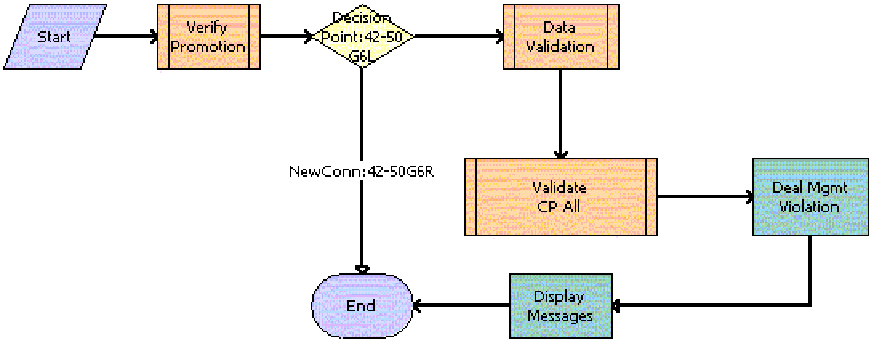

Figure 2. Verify Header (Order) Workflow

Workflow Description. This workflow does the following:

1. **Verify Promotion.** Calls the ISS Promotion Verify SubProcess workflow to verify promotion status.
2. **Decision Point: 42-50G6L.** Determines if a commitment for the promotion is broken.

3. **Data Validation.** If no commitment is broken, calls the ISS Validation (Order) workflow to verify data validation rules.
4. **Validate CP All.** Calls the VORD Validate Complex Product All (Order) workflow to validate all complex products under the order.
5. **Deal Mgmt Violation.** Calls the GetDealMgmtViolationText business service method and passes the violation messages for orders to the next step.
6. **Display Messages.** Displays all messages generated by the previous steps.

Pricing Procedure - Calculate Net Price

The Pricing Procedure - Calculate Net Price workflow, shown in Figure 3, is responsible for the net price calculation, which takes into account the volume discount, aggregate discount sequence, product promotion, manual adjustment, and minimum-maximum price bound checks.

For more information about this workflow, see *Siebel Pricing Administration Guide*.

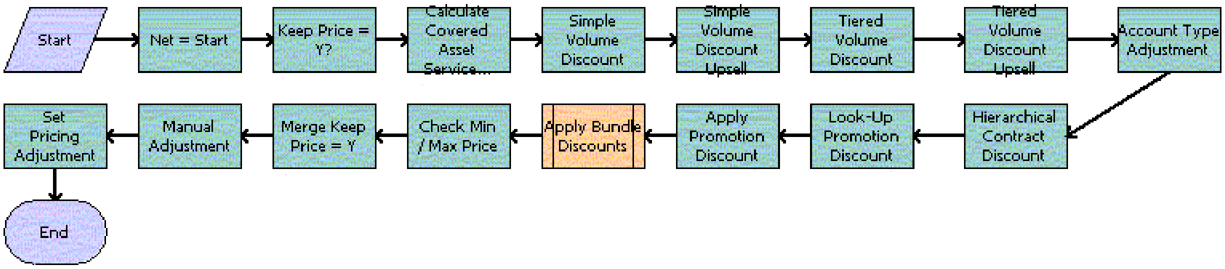
Start
Net = Start
Keep Price = Y?
Calculate Covered Asset Service...
Simple Volume Discount
Simple Volume Discount Upsell
Tiered Volume Discount
Tiered Volume Discount Upsell
Account Type Adjustment
Hierarchical Contract Discount
Look-Up Promotion Discount
Apply Promotion Discount
Apply Bundle Discounts
Check Min / Max Price
Merge Keep Price = Y
Manual Adjustment
Set Pricing Adjustment
End

Figure 3. Pricing Procedure - Calculate Net Price Workflow

Workflow Description. This workflow does the following:

1. Shows the invoice price before the adjustment.
2. Initializes the net price value as the start price value.
3. Moves those rows with the Exclude Pricing flag set to the Keep Price Row Set row set. This workflow step skips all the system-generated discounts in the procedure.
4. Queries the FS Product Price Item Details business component for any pricing adjustment for a covered asset service.
5. Evaluates simple and tiered volume discount. This step also populates the next discount and upsell message for upsell purposes.
6. Applies the account type adjustment.
7. Applies the best available contract discount for this account or any parent account.
8. Evaluates product promotion discounts.

9. Calls the Pricing Procedure - Bundle Discount subprocess to evaluate the aggregate discount sequence.
10. Checks if the current net price is within the boundary of the minimum and maximum price.
11. Merges the priced line items and the line items without prices.
12. Applies a manual adjustment (discount amount, discount percentage, discount price and header discount percentage).
13. Sets the pricing adjustment that indicates the total amount of system-generated discount accounts.

New Workflows for Siebel Deal Management

The following workflows are new for Siebel Deal Management:

- Deal Mgmt PSP Driver Workflow Process on page 36
- Dynamic Pricing Procedure - Deal Management on page 37
- Get Ceiling Price List on page 40
- Get Cost List Price on page 41

Deal Mgmt PSP Driver Workflow Process

The Deal Mgmt PSP Driver Workflow Process workflow, shown in Figure 4, is a controller workflow for Oracle's Siebel Deal Management.

This Workflow is called from GetWaterfall signal when the GetWaterfall business service is called.

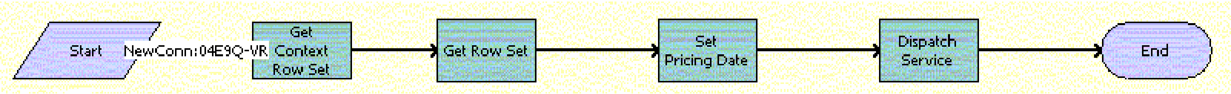

Figure 4. Deal Mgmt PSP Driver Workflow Process Workflow

Workflow Description. This workflow does the following:

1. **Get Context Row Set.** Generates the context property set, which represents the Header business component.
2. **Get Row Set.** Generates the row set property set, which represents the Line Item business component.
3. **Set Pricing Date.** Sets the pricing date.
4. **Dispatch Service.** Dynamically dispatches to a subprocess.

Table 2 shows the workflow steps that call business service methods.

Table 2. Steps in the Deal Mgmt PSP Driver Workflow Process Workflow

Workflow Step	Method Called	In Business Service
Get Context Row Set	GetRowSetData	Context Service
Get Row Set	GetRowSetData	Context Service
Set Pricing Date	Conditional Action Transform	Row Set Transformation Toolkit
Dispatch Service	CallPSPWorkflow	ISS PSP Dispatch Service

Dynamic Pricing Procedure - Deal Management

The Dynamic Pricing Procedure - Deal Management workflow, shown in Figure 5, provides advanced pricing capabilities. This workflow contains steps and subprocesses that populate the List Price, Start Price, and Net Price fields. It also calculates the monthly recurring and nonrecurring subtotals for root Customizable Products. These prices and subtotals are calculated based on information from price lists, customizable product adjustments, volume discounts, attribute adjustments, aggregate discounts, service price details, product promotions, and manual discounts. This workflow also finds guideline terms for deals and deal line items, and sets any status and violation messages for these guideline terms.

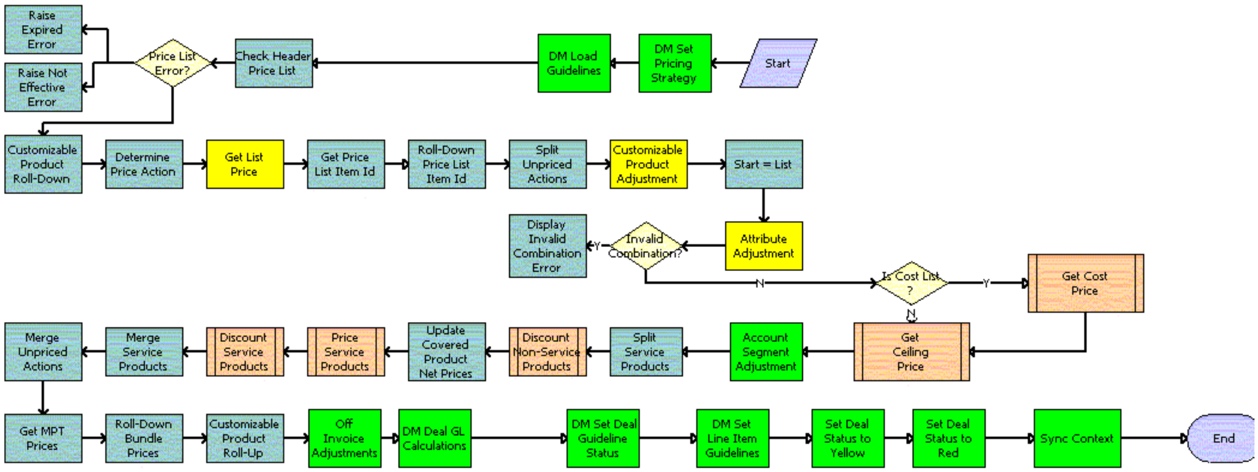
Raise Expired Error
Raise Not Effective Error
Price List Error?
Check Header Price List
DM Load Guidelines
DM Set Pricing Strategy
Start
Customizable Product Roll-Down
Determine Price Action
Get List Price
Get Price List Item Id
Roll-Down Price List Item Id
Split Unpriced Actions
Customizable Product Adjustment
Start = List
Display Invalid Combination Error
Y
Invalid Combination?
Attribute Adjustment
N
Is Cost List ?
Y
Get Cost Price
N
Merge Unpriced Actions
Merge Service Products
Discount Service Products
Price Service Products
Update Covered Product Net Prices
Discount Non-Service Products
Split Service Products
Account Segment Adjustment
Get Ceiling Price
Get MPT Prices
Roll-Down Bundle Prices
Customizable Product Roll-Up
Off Invoice Adjustments
DM Deal GL Calculations
DM Set Deal Guideline Status
DM Set Line Item Guidelines
Set Deal Status to Yellow
Set Deal Status to Red
Sync Context
End

Figure 5. Dynamic Pricing Procedure - Deal Management Workflow

Workflow Description. This workflow does the following:

1. Sets the strategy for the header record.
2. Loads the deal and line item guidelines that are between the appropriate start and end dates.

3. Checks for price-list effectivity. Siebel Deal Management generates an error if the price list is not yet effective or has expired.
4. Calculates the extended quantity of all component products of a complex product instance, and carries over some useful information from the complex product root to the complex product components.
5. Determines the price action code, based on the item action code and the price type.
6. Gets the list price for each row in the row set, and appends other values from the Price List Item business component to the row.
7. Puts the Price List Item ID for the complex product root on each component of the complex product for later use.
8. Finds all values for the price list item.
9. Moves those rows with an action code that are not priced to another row set that is not priced in the procedure.
10. Gets Complex Product Pricing Designer adjustments for the components of a complex product.
11. Initializes the start price value as the list price value.
12. Applies attribute adjustments to the start price and generates an error when an invalid combination for attribute pricing occurs.
13. If a cost price list exists, this step calls the Get Cost List Price workflow to obtain the cost list price.
14. Calls the Get Ceiling Price List workflow to obtain a ceiling price.
15. Finds the adjustments, based on the discount matrices for the product.
16. Moves service products from the row set into another row set for use in the service pricing subprocess.
17. Calls the Pricing Procedure - Calculate Net Price subprocess for nonservice products.
18. Updates the net price field for the covered product on the service product rows in the row set.
19. Calls the Pricing Procedure – Service subprocess to handle the service product-specific pricing for service products.
20. Calls the Pricing Procedure - Calculate Net Price subprocess for service products.
21. Merges the service and nonservice row sets into one row set.
22. Merges the priced row sets and the row sets without prices into one row set.
23. Establishes the NRC (Non-Recurring Charge) and MRC (Monthly Recurring Charge) prices for one-time and monthly recurring price types, which is later used for Customizable Product Rollup.
24. Allocates the discount of the bundle root products to the bundle component products.
25. Rolls up the prices of component products to the complex product root.
26. Finds the adjustments based on the discount matrices for the product class.
27. Calculates the guidelines for the line items and the header record.
28. Sets the guideline status for the line items and the header record.

29 Sets the header status to yellow if any of the statuses for the line items is yellow. Sets the header status to red if any of the statuses for the line items is red.

30 Synchronizes the Header data with the database, using the Context Service business service.

Table 3 shows the workflow steps that call business service methods.

Table 3. Steps of the Dynamic Pricing Procedure - Deal Management Workflow

Workflow Step	Method Called	In Business Service
DM Set Pricing Strategy	Query Transform	Row Set Transformation Toolkit
DM Load Guidelines	Query Transform	Row Set Transformation Toolkit
Check Header Price List	Query Transform	Row Set Transformation Toolkit
Raise Expired Error	Raise Price List Expired Error	Pricing Manager
Raise Not Effective Error	Raise Price List Not Effective Error	Pricing Manager
Customizable Product Roll-Down	Hierarchical Transform	Row Set Transformation Toolkit
Determine Price Action	Conditional Action Transform	Row Set Transformation Toolkit
Get List Price	Simple Look-Up Transform	Row Set Transformation Toolkit
Get Root Price List Item Id	Hierarchical Transform	Row Set Transformation Toolkit
Roll Down Price List Item Id	Hierarchical Transform	Row Set Transformation Toolkit
Split Unpriced Actions	Split Transform	Row Set Transformation Toolkit
Customizable Product Adjustment	Simple Look-Up Transform	Row Set Transformation Toolkit
Start = List	Conditional Action Transform	Row Set Transformation Toolkit
Attribute Adjustment	Dynamic Look-Up Transform	Row Set Transformation Toolkit
Display Invalid Combination Error	Throw Invalid Combination Error	Dynamic Matrix Retrieval Service
Account Segment Adjustment	Simple Look-Up Transform	Row Set Transformation Toolkit
Split Service Products	Split	Row Set Transformation Toolkit
Update Covered Product Net Prices	Row Set Look-Up Transform	Row Set Transformation Toolkit
Merge Service Products	Merge Transform	Row Set Transformation Toolkit
Get MPT Prices	Conditional Action Transform	Row Set Transformation Toolkit
Merge Unpriced Actions	Merge Transform	Row Set Transformation Toolkit
Roll-down bundle prices	Hierarchical Transform	Row Set Transformation Toolkit
Customizable Product Roll-ups	Hierarchical Transform	Row Set Transformation Toolkit

Table 3. Steps of the Dynamic Pricing Procedure - Deal Management Workflow

Workflow Step	Method Called	In Business Service
Off Invoice Adjustment	Simple Look-Up Transform	Row Set Transformation Toolkit
DM Deal GL Calculations	Conditional Action Transform	Row Set Transformation Toolkit
DM Set Deal Guideline Status	Row Set Look-Up Transform	Row Set Transformation Toolkit
DM Set Line Item Guidelines	Row Set Look-Up Transform	Row Set Transformation Toolkit
Set Deal Status to Yellow	Row Set Look-Up Transform	Row Set Transformation Toolkit
Set Deal Status to Red	Row Set Look-Up Transform	Row Set Transformation Toolkit
Sync Context	SyncRowSetData	Context Service

Get Ceiling Price List

The Get Ceiling Price List workflow, shown in Figure 6, obtains a ceiling price for a quote or an order line item.

This workflow is called when the user selects Reprice All in the menu for a quote or an order line item. The Dynamic Pricing Procedure - Deal Management workflow calls this workflow.

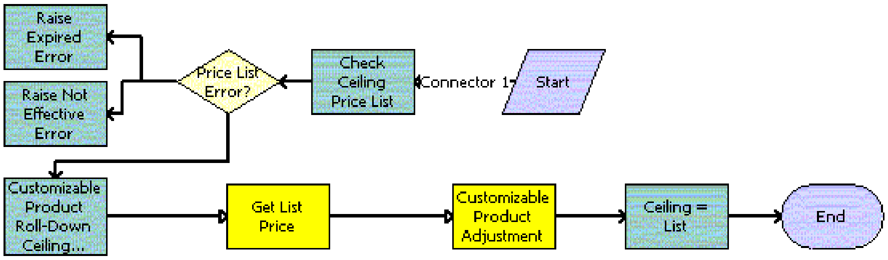
Raise Expired Error
Raise Not Effective Error
Price List Error?
Check Ceiling Price List
Connector 1
Start
Customizable Product Roll-Down Ceiling...
Get List Price
Customizable Product Adjustment
Ceiling = List
End

Figure 6. Get Ceiling Price List Workflow

Workflow Description. This workflow does the following:

1. **Check Ceiling Price List.** Determines if the ceiling price list exists.
2. **Price List Error?** Checks for an error in the ceiling price list.
3. **Raise Expired Error.** Generates an error if the price list has expired.
4. **Raise Not Effective Error.** Generates an error if the price list is not effective.
5. **Customizable Product Roll-Down Ceiling Price List.** Calculates the quantity of each component in a customizable product instance and obtains the price list ID and promotion ID from the product root.
6. **Get List Price.** Finds all values for the price list item.

7 **Customizable Product Adjustment.** Applies adjustments to the customizable product components.

8 **Ceiling = List.** Initializes the ceiling price value as the list price value.

Table 4 shows the workflow steps that call business service methods.

Table 4. Steps in the Get Ceiling Price List Workflow

Workflow Step	Method Called	In Business Service
Check Ceiling Price List	Query Transform	Row Set Transformation Toolkit
Raise Expired Error	Raise Price List Expired Error	Pricing Manager
Customizable Product Roll-Down Ceiling Price List	Hierarchical Transform	Row Set Transformation Toolkit
Get List Price	Simple Look-Up Transform	Row Set Transformation Toolkit
Customizable Product Adjustment	Simple Look-Up Transform	Row Set Transformation Toolkit
Ceiling = List	Conditional Action Transform	Row Set Transformation Toolkit

Get Cost List Price

The Get Cost List Price workflow, shown in Figure 7, obtains the cost list price for a quote or an order line item.

This workflow is called when the user selects Reprice All in the menu for a quote or an order line item. The Dynamic Pricing Procedure - Deal Management workflow calls this workflow.

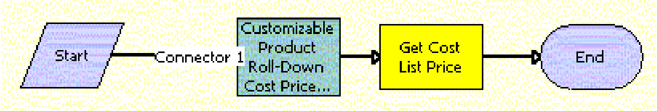

Figure 7. Get Cost List Price Workflow

Workflow Description. This workflow does the following:

1 **Customizable Product Roll-Down Cost Price List.** Calculates the quantity of each component in a customizable product instance and obtains the price list ID and promotion ID from the product root.

2 **Get Cost List Price.** Finds all values for the price list item.

Table 5 shows the workflow steps that call business service methods.

Table 5. Steps in the Get Cost List Price Workflow

Workflow Step	Method Called	In Business Service
Customizable Product Roll-Down Cost Price List	Hierarchical Transform	Row Set Transformation Toolkit
Get Cost List Price	Simple Look-Up Transform	Row Set Transformation Toolkit

Index

No index available with this guide.