

**Oracle® Financial Services**  
**Revenue Management and Billing**  
**Deal Management**

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**User Guide**

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# Preface

## About This Document

This guide aims to act as a reference guide to an administrator user and helps him with day-to-day tasks, as well as provides some pointers on how to handle some commonly seen change requests. The document is organized in the form of a comprehensive questionnaire and covers most of the administrative tasks.

## Intended Audience

This document is intended for the following audience:

- End-Users
- Consulting Team

## Organization of the Document

The information in this document is organized into following sections:

Section No.	Section Name	Description
Section 1	Introduction	About the product and the types of analyses included
Section 2	Deal Management	Explanation of Deal Management dashboard

## Related Documents

You can refer to the following documents for more information:

Document	Description
<i>Oracle Revenue Management and Billing Analytics Install Guide</i>	Lists the pre-requisites, supported platforms, and hardware and software requirements for installing the Oracle Revenue Management and Billing Analytics application. It also explains how to install the Oracle Revenue Management and Billing Analytics application.

## Change Log

Revision	Last Update	Updated Section	Comments
1.0	May 2018	All	New document
1.1	January 2019	1.1	Add a note to refer to security guide

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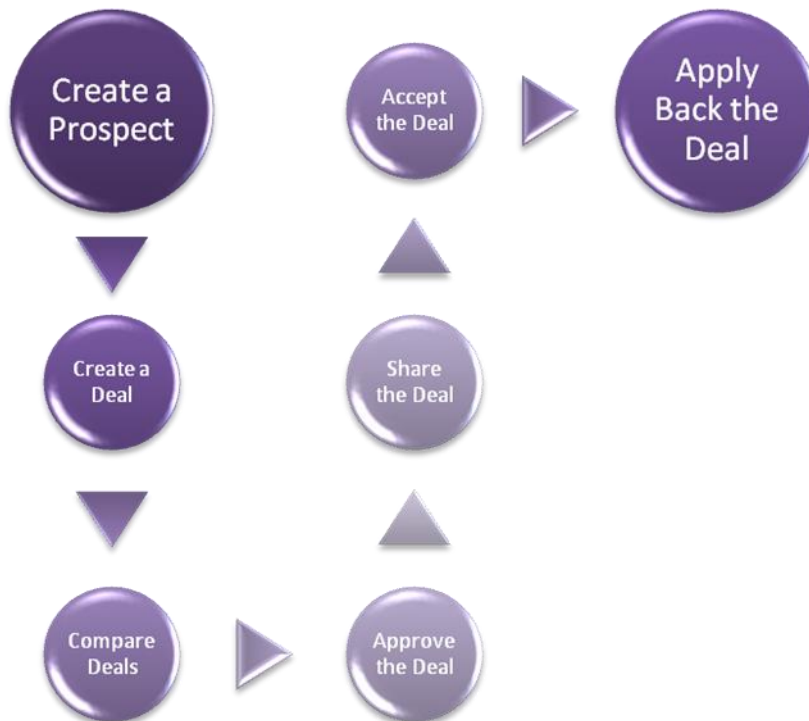
# 1. Introduction to Deal Management

Creating an optimum deal for a prospect or an existing customer is business critical for most financial institutions. Without the aid of an analytical tool, this process is purely based on the intuition of the sales personnel or relationship manager and the information they have in hand.

Deal Management module of ORMBA is a disparate tool that lets you manage the entire life cycle of a deal, arriving at the right price and offers for a prospect or an existing customer. The module contains a powerful simulation tool that lets you play around with the pricing configurations to arrive at optimal pricing. It also includes a highly flexible workflow for the deal approval. The major highlights of ORMBA Deal Management are:

- Equips Sales personnel with a single tool for managing all stages of the Deal lifecycle
- Ensures right price for the deal
- Predicts the impact on revenue
- Prevents over-discounting
- Includes a streamlined approval workflow
- Assures deal profitability based on real data

Thus, equipped with ORMBA Deal Management module, a sales personnel or a Relationship Manager can negotiate each deal with confidence. The Deal Management module of ORMBA covers the entire lifecycle of a deal starting from creation of a prospect customer and ending with apply back of deal to the source system. The major stages of deal management lifecycle are illustrated in the image below:



**Figure 1: Stages of Deal Management Workflow**

To know more about each stage of Deal Management Life Cycle, see section [1.2](#).

There are several types of users involved in the deal creation and approval life cycle. To know more about each user and their functions, see section [1.1](#).

## 1.1 Deal Management User Roles

The main user roles applicable for Deal Management module are:

- Relationship Manager (RM)
- RM Approver
- RM Administrator

These user roles are created in ORMBA Admin UI and are configured by associated different role types. To know more about this, refer to ORMBA Security Guide.

### 1.1.1 Relationship Manager

Relationship Manger role is the most commonly used role and you can create them in the ORMBA Admin UI with the role type 'Relationship Manager'. The main features of Relationship Manager role are:

- Can access Relationship Manager dashboard and Deal Management dashboard
- Can create prospects and deals
- Can delete prospects and deals
- Can reassign deals to other RM users

### 1.1.2 Deal Approver

A Deal Approver user reviews and approves a deal at various stages of its workflow. To create a Deal Approver user, assign the roles of type 'Deal Approver' while creating them in ORMBA Admin UI. The main features of a Deal Approver are:

- Can approve or reject deals assigned to them
- Cannot access Deal Management dashboard or Access Control Definition page

### 1.1.3 RM Administrator

You can create RM Administrator role with the role type 'Relationship Manager' and Admin Privileges 'Yes' selected in ORMBA Admin UI. The main features of an RM Administrator role are:

- Can access Deal Management dashboard and Access Control Definition page
- Has an additional tab named 'Admin' on the Deal Management home page
- Can reassign deals from any RM user to another
- Can unlock deals that an RM Approver has locked for approval
- Can create access control definitions for any RM user




## 1.2 Deal Management Life Cycle

The Deal Management module of ORMBA manages the entire lifecycle of a deal from inception to completion. The main stages in the deal lifecycle are:

1. Prospect and Deal creation
2. Deal approval workflow
3. Deal access control
4. Document reference
5. Deal comparison
6. Deal comparison with competitor pricelist
7. Deal forecasting
8. Deal printing or export
9. Customer acceptance
10. Apply Back to Source

### 1.2.1 Prospect and Deal Creation

You can create a prospect customer hierarchy and then create a deal using the Deal Creation Wizard. To know more about these processes, see section [1.10](#).

Once you create a deal, you can submit it for approval. You can submit a deal for approval by opening it from the Deal Home page, and clicking the Submit  button against the version you want to submit.

### 1.2.2 Deal Approval Workflow

Every deal goes through an approval workflow before it is available for customer acceptance. The approval workflows can contain multiple stages as well as branches. The workflow branches run in parallel and progression through each branch is independent of the rest of the branches. Each stage of approval can have one or more approvers. You can define the product(s) or (division)s or price assignment(s) that each approver can approve.

**Note:** Some approval workflow definitions include roles in place of users, in which case any user with the assigned role would be able to approve or reject the deal. Prior to approval/rejection, the user must lock it under their name, so that the deal is unavailable to other users with the same role. This prevents simultaneous approval/rejection of the deal.





**Figure 2: Deal Approval Workflow**

You can create approval workflows and the corresponding entry criteria using the ORMBA Admin UI. Each workflow and its branches can have an entry criterion that decides the deals for which it is applicable. The entry criterion for a workflow or a branch is a range of Impact %, Discount %, and Profitability %. While you submit a deal for approval, system validates the deal attributes against the workflow entry criteria and is submitted to it only if the criteria matches.

**Note:** If a deal's attributes does not match the entry criteria of any of the available workflow definitions, it is auto-approved. That is, the deal will not go through an approval cycle.

Once submitted for approval, when an approver user logs into ORMBA, the deal appears under the Assigned Deals section of Deal Management home page. At any stage of approval, an approver can take a look at the Workflow details like the number of stages or levels involved in the approval of a deal.

To view the details of the approval workflow in which the deal is currently in, follow the procedure below:

1. Navigate to the Deal Home page and go to either My Deals or Assigned Deals list, depending on whether you are the deal creator or not.
2. Click the View Versions  button against the deal for which you want to view the workflow. This lists all the versions of a deal.
3. Click the View Workflow  button against the version you want to view.
4. The page displays the workflow details like the list of stages, along with owner of each stage, the actions taken by the owner, date and time at which the action was taken, and the remarks they have made while performing the action. Additionally, if a document URL was given during any stage of workflow, you can see it listed.

Model ID	Model Name	Created By
1137	Big Mart - Deal1	RM_NORMAL

Workflow	Role	User	Action	Timestamp	Remarks	Document URL
Submit		RM_NORMAL	Submitted	June 07, 2018 04:16:57 AM	Deal Submit	
Approval		RM_NORMAL	Approved	June 07, 2018 04:16:58 AM	Auto-Approved	
Customer Acceptance		RM_NORMAL	Pending			
Apply Back		RM_NORMAL	Pending			

**Figure 3: Deal Workflow Details**

An approver can reject a deal at any stage. Once rejected, the deal returns to draft status and the deal originator can edit it before submitting again.

### 1.2.3 Deal Access Control

In case of planned absence of a relationship manager user, system allows them to delegate their access rights to another user of same role group for a defined period. RM can give either Full Control or Read Only access rights to the delegated user.

- Read Only access: During the delegation period, the delegated user can view the customer list and deals list of the Relationship Manager.
- Full Control access: During the delegation period, the delegated user can view the customer list and deals list of the RM. They can also perform various deal-related actions like creation, submission, approval, rejection, customer acceptance, etc. on the Relationship Manager's behalf.

**Note:** An RM administration user can create delegation definitions for any relationship manager user in their absence.

While providing Full Control access, you cannot create overlapping access control definitions, as you cannot give full control access to more than one RMs for the same period. However, you can delegate Read Only access to more than one Relationship Managers at a time.

To delegate your access rights to another RM, follow the procedure below:

1. Navigate to the Deal Home page and click on Access Control button. This opens the Access Control page that lists all your access control definitions.

Access Control

+ New Access Control

Start Date

End Date

Access Mode

Status

Search

Reset

Records per page: 
[Previous](#) [Page 1 of 3](#) [Next](#)

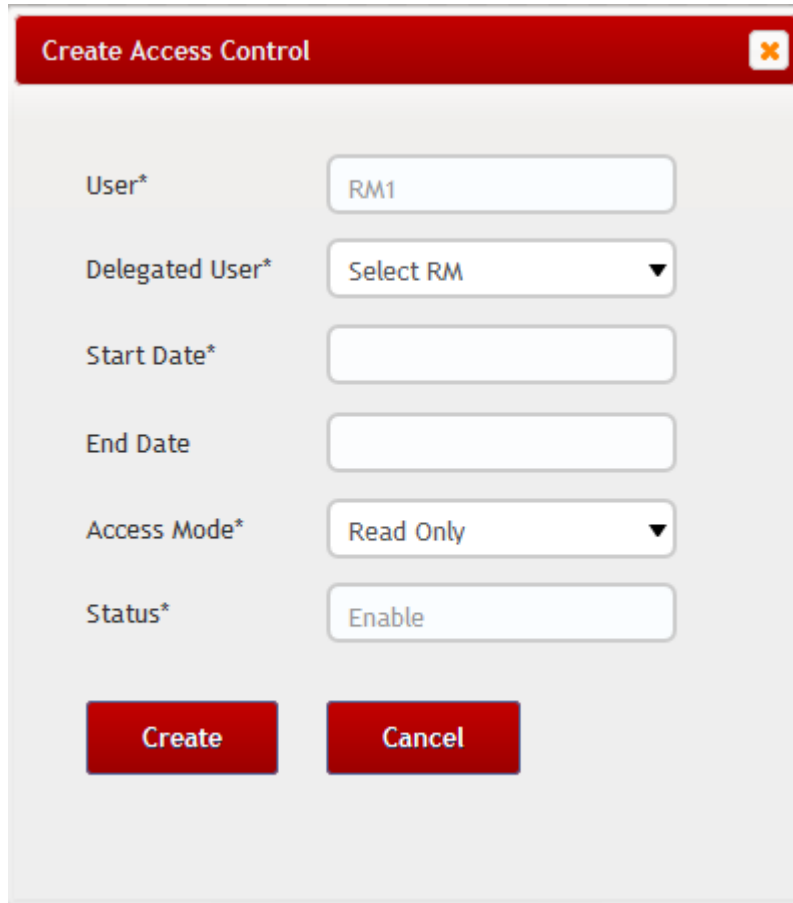
User	Delegated User	Start Date	End Date	Access Mode	Status	
RM1	RM2	08/01/2019	08/30/2019	Read Only	Enable	
RM1	RM2	07/01/2019	07/30/2019	Read Only	Enable	
RM1	RM2	06/01/2019	06/30/2019	Read Only	Enable	
RM1	RM2	04/02/2018	04/30/2018	Full Control	Enable	
RM1	RM2	05/01/2018	05/31/2018	Full Control	Enable	

**Figure 4: Access Control Page**

**Note:** If you are an RM administrator user, you can view access control definitions for all users in the system.

2. Click on Edit Access Control button against a definition to edit its details. Once created, you can edit only the delegation End Date and Status.
3. Click on + New Access Control button to create a new definition. This opens the Create Access Control pop up.

**Note:** If you are an RM administrator user, you can create access control definitions for any RM in the system. On the other hand, if you are a relationship manager, you can create definitions only for yourself.



The screenshot shows a 'Create Access Control' dialog box with the following fields and values:

- User\*: RM1
- Delegated User\*: Select RM
- Start Date\*: (empty)
- End Date: (empty)
- Access Mode\*: Read Only
- Status\*: Enable

Buttons: Create, Cancel

**Figure 5: Create Access Control**

4. In the Create Access Control, enter the following details:
  - Displays the logged in RM's name. If you are an administrator user, this field is editable and you can select the user for whom you are creating the access control definition.
  - Select the user to whom you are delegating the access control in the Delegated User field.
  - Enter the Start Date and End Date for defining the period of delegation.
  - Select either Read Only or Full Control in the Access Mode field.
  - The Status field displays Enable. While editing a definition, you can change the status to Disable, if you required.
  - Click Create to create the access control definition.

**Note:** You can create open dated definitions for Read Only access control definitions.

## 1.2.4 Deal Documentation

At any stage of deal approval and customer acceptance, the approvers can attach reference documents to a deal. You can upload the documents to a repository and provide the URL to the document while submitting, approving, or accepting a deal. Once you mention a document URL in a stage of Deal Approval Workflow, it is available for reference in the Deal Workflow Details section.

To attach a document to a deal while submitting, approving, or accepting a deal, enter the URL to the document in the Document URL field of the popup window.

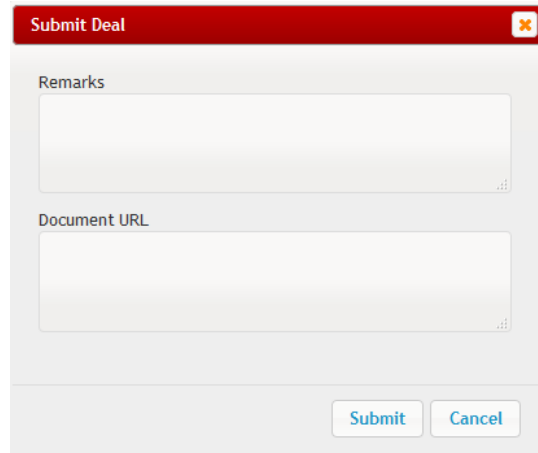


Figure 6: Attach Document to a Deal

## 1.2.5 Deal Comparison

ORMBA Deal Management offers deal comparison in three contexts:

- Compare a deal with another deal
- Compare one version of a deal with another version of the same deal
- Compare a deal with a competitor pricelist

At any stage of deal creation and approval, the approvers or creators can compare the deal pricing details with that of another deal or with another version of the same deal, or with a competitor pricelist. You can compare deals based on three attributes:

- Revenue
- Profitability
- Average Price

Based on the attribute you select, you can see a side-by-side comparison of either the revenue or profitability or average price, against each of the products within the deal. You can also export the results of deal comparison.

Additionally, irrespective of the attribute you select for comparison, the page displays the comparison of profitability of the selected deals as well.

To compare two deals or two versions of a deal, follow the procedure below:

1. Navigate to the Deal Home page and go to either My Deals or Assigned Deals list, depending on whether you are the deal creator or not.
2. Select the deals you want to compare and click Compare. Note: You can compare up to five deals at a time, provided they have the same currency.
3. The Compare Models page lists all the products selected in each of the deals in a table. If a product is not available in a deal, the table displays NA.

	TD2 (Version: 1)	TimesDivision1 (Version: 2)
Profitability	100	100
J0003	1,600,000.00	12,000.00
J0005	NA	8,700.00
J0004	18,000.00	114,000.00



**Figure 7: Compare Models List**

- In the 'Compare based on' drop down, select the attribute based on which you would like to compare the deals. The values available in the list are Revenue, Profitability, and Average Price. Based on the attribute selected, the table displays the comparison of its values. **Note:** By default, the page displays the comparison of revenue from each of the selected deals.
- To export the results of comparison to an excel sheet, click on the Export to Excel Sheet button on the page. An excel sheet with the comparison results opens up and you can save the results for reference.

## 1.2.6 Deal Comparison with Competitor Pricelist

You can compare a deal with a competitor pricelist, and to do this you need to upload the competitor pricelist details to DWADM schema. For detailed instructions on how to do upload the competitor pricelist, see ORMB Admin Guide.

To compare a deal with a competitor pricelist, follow the procedure below:

- Navigate to the Deal Home page and go to either My Deals or Assigned Deals list, depending on whether you are the deal creator or not.
- Click the View Versions  button against the deal you want to compare with the competitor's pricelist. This lists all the versions of a deal.
- Click the Compare with Competitor Pricelist  button. This opens the Select Competitor Pricelist popup.

Select	Competitor	Pricelist	Currency
<input type="radio"/>	Competitor2	Pricelist 1 - Competitor2	US Dollars
<input type="radio"/>	ABC Competitor_1	ABC Competitor Pricelist_1	US Dollars

**Figure 8: Select Competitor Pricelist**

- Select the pricelist with which you want to compare the deal pricing details and click Compare.
- The page displays a side-by-side comparison of the deal and the selected competitor pricelist. **Note:** By default, the page displays the revenue comparison of the deals.

Compare Model with Competitor Pricelist		
Products	Hrithik,Roshan - Deal1 (Version: 1)	ABC Competitor_1 (ABC Competitor Pricelist_1)
J0002	\$60,000.00	\$600.00
J0005	\$30,000.00	\$30,000.00



Figure 9: Compare Model with Competitor Pricelist

- In the 'Compare based on' drop down, select the attribute based on which you would like to compare the deal and the competitor pricelist. The values available in the list are Revenue, Commitment, and Average Price. Based on the attribute selected, the table displays the comparison of its values. **Note:** By default, the page displays the comparison of revenue from each of the selected deals.
- To export the results of comparison to an excel sheet, click on the Export to Excel Sheet button on the page. An excel sheet with the comparison results opens up and you can save the results for reference.

### 1.2.7 Deal Forecasting

Deal forecasting feature of ORMBA helps you to forecast the revenue generated from a deal at the end of selected number of years.

To forecast the deal revenue, follow the procedure below:

- Navigate to the Deal Home page and go to either My Deals or Assigned Deals list, depending on whether you are the deal creator or not.
- Click the View Versions  button against the deal you want to print or export. This lists all the versions of a deal.
- Click the Forecast  button to forecast the deal revenue. This opens the Forecast page.

Years:

	Price Variation(%)	Commitment Variation(%)
Deal : Shobha Deal1	<input type="text" value="-10.00"/>	<input type="text" value="10.00"/>
J0003	<input type="text" value="5"/>	<input type="text" value="10"/>
J0002	<input type="text" value="5"/>	<input type="text" value="10"/>

Figure 10: Deal Forecast




- Select the number of years for which you want to forecast.
- Enter the price and commitment variation that you anticipate for the period, at a deal level and at a product level.
- Click Forecast button. The page shows you the results of forecast.



## 1.2.8 Deal Printing or Export

Once you create and save a deal in the system, you can print the details of the deal in a PDF format. Currently, ORMBA offers to print a deal in two formats – Internal and External. The Internal format includes all details of the deal including confidential information like Profitability, Discount, and Revenue Impact, whereas the External format contain only those information that are relevant to the customer.

To print or export the details of a deal into a PDF file, follow the procedure below:

1. Navigate to the Deal Home page and go to either My Deals or Assigned Deals list, depending on whether you are the deal creator or not.
2. Click the View Versions  button against the deal you want to print or export. This lists all the versions of a deal.
3. Click the Print  button to view the deal details. This opens the Deal Details page.
4. Select Internal or External from the drop-down list. If you select External, some details like Proposed Revenue, Profitability, and Discount are hidden.
5. Click Page Options  button at the top right corner of the page, and select Print → Printable PDF option.

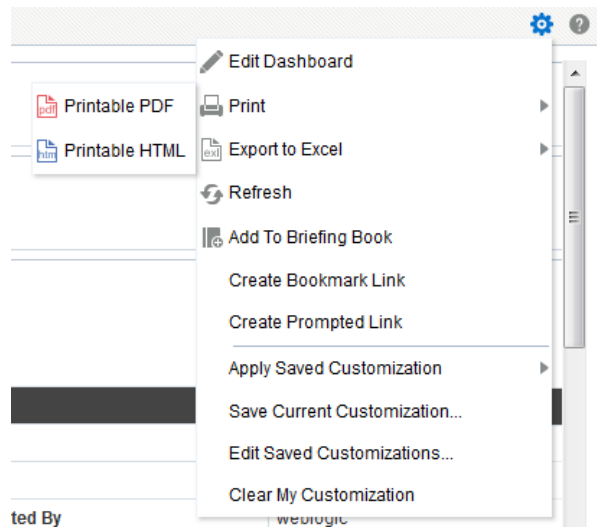


Figure 11: Print Deal Option




6. Save the file and share with the stakeholders.

## 1.2.9 Customer Acceptance

Once the deal goes through the approval workflow successfully, it is available for customer acceptance. You can export the details of the deal to a PDF file and share with the customer. Once the customer accepts the deal, the Relationship Manager promotes the deal on behalf of the customer.

To accept an approved deal on customer behalf, follow the procedure below:

1. Navigate to the Deal Home page and go to either My Deals or Assigned Deals list, depending on whether you are the deal creator or not.

2. Click the View Versions  button against the deal you want to accept on the customer's behalf. This lists all the versions of a deal.
3. Click the Accept  button against the approved version of the deal. If you need to reject the deal, you can click the Decline  button.
4. While trying to accept or decline a deal, a popup appears where you can enter your acceptance or rejection comments. Additionally, you can also provide URL of any documents that you have uploaded to a document repository.

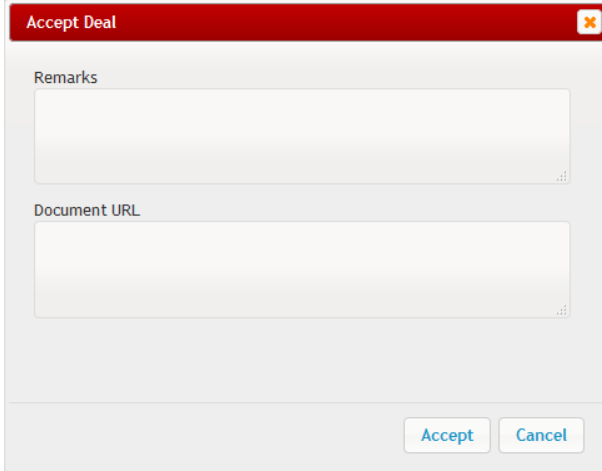



The image shows a dialog box titled "Accept Deal" with a red header bar and a close button in the top right corner. Inside the dialog, there are two text input fields: "Remarks" and "Document URL". At the bottom right of the dialog, there are two buttons: "Accept" and "Cancel".

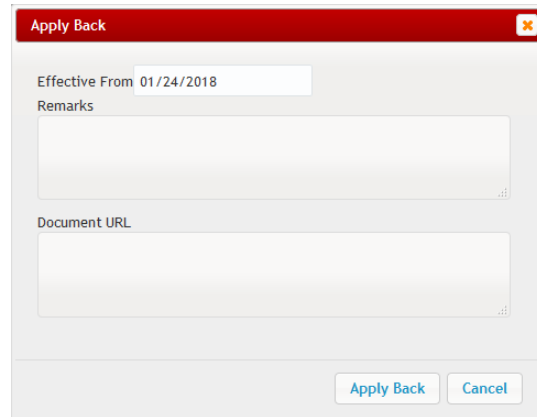
Figure 12: Accept Deal

5. You will now see the Apply Back  button against the deal.

### 1.2.10 Apply Back to Source

Deals accepted by the customer are applied back to the source system (ORMB), where a new customer hierarchy, pricelist(s) and other details are generated. To apply back an accepted deal to source system, follow the procedure below:

1. Navigate to the Deal Home page and go to either My Deals or Assigned Deals list, depending on whether you are the deal creator or not.
2. Click the View Versions  button against the deal you want to apply back to the source system. This lists all the versions of a deal.
3. Click the Apply Back  button against the deal to apply the deal details to source system.
6. While trying to apply back a deal, a popup appears where you can enter your comments and provide URL of any documents that you have uploaded to a document repository. Additionally, you can enter the date from when the deal details should be effective in the source system. You can enter only current or future dates.



**Figure 13: Apply Back**

## 1.3 Deal Management Home page

The Home page of Deal Management module allows you several features, like:

- Option to navigate to List of Prospects and List of Customers
- Create a new deal
- Search for deals using deal creation date, deal id or name, deal status, or client name or status
- View list of deals created by you or assigned to you
- (Optional) Administrator can view a list of all deals in the system
- Generate a printable report of all deals
- Create or view access control definitions

## 1.4 My Prospects

A relationship manager can manage the prospect customers under them using the My Prospects page within Deal Management. From this page, you can do the following actions:

- View the list of prospects
- Create a new prospect
- View the list of deals
- Edit prospect details
- Create a new deal for an existing prospect
- View details of a prospect
- View or edit deal details
- Copy a deal to create a new one
- Delete a prospect
- Delete a prospect's deal

**Note:** Please note that you can perform the above actions for another Relationship Manager if they have delegated Full Control access to you through Access Control Definition. To do this, select their name in the RM field on Deal Management home page.

### 1.4.1 Viewing the List of Prospects

You can view the list of prospects under a Relationship Manager by clicking on the My Prospects button.

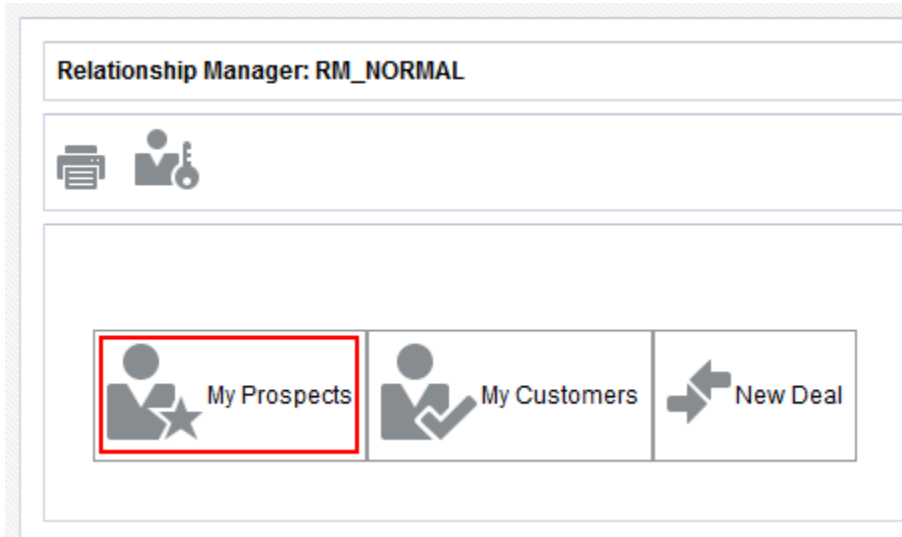


Figure 14: My Prospects link

When you click the My Prospects link, you will see the list of all prospects you created.

**Note:** If you have been delegated access rights of another RM through access control definition, then you can view their prospects also. To do this, select their user name in RM filter field on the page.

Prospects of RM

Prospects
 My Deals

Find

10 ▼ Records per page
[Previous](#) Page 1 of 1 [Next](#)

ID	Name	Segment	Currency	Multi Division	Review Frequency	Created Date	Phone	Status			
3860	TESTRMFinal,TESTRMFinal	Person	USD	No	Annual	05/15/2018 01:44:01 AM		Ongoing			
3822	TestRMtoRM1,TestRMtoRM1	Person	SGD	No	Annual	05/14/2018 07:02:52 AM		Ongoing			
3820	asdsadasd	Broker	USD	Yes	Annual	05/14/2018 06:10:21 AM		New			
3819	25625	Broker	USD	Yes	Annual	05/14/2018 06:03:32 AM		New			
3801	TESTRM2,TESTRM2	Person	USD	No	Annual	05/14/2018 04:33:25 AM		Ongoing			
3800	TESTRM,TESTRM	Person	USD	No	Annual	05/14/2018 04:25:30 AM		Ongoing			
3799	TestRM,TestRM	Person	USD	No	Annual	05/14/2018 04:15:42 AM		New			
3769	TestIssue,TestIssue	Person	USD	No	Annual	05/13/2018 03:27:26 AM		Ongoing			

Figure 15: Prospects List

## 1.4.2 Creating a Prospect

Click on the Prospects link to create a new prospect customer.

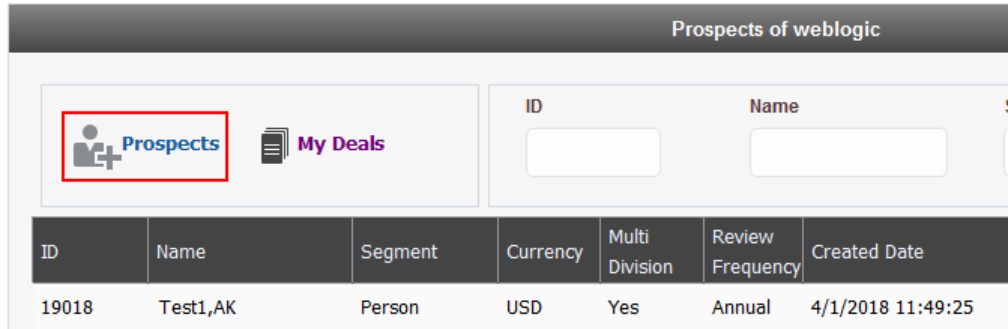


Figure 16: Prospects Link

This takes you to the Create Prospect Page.

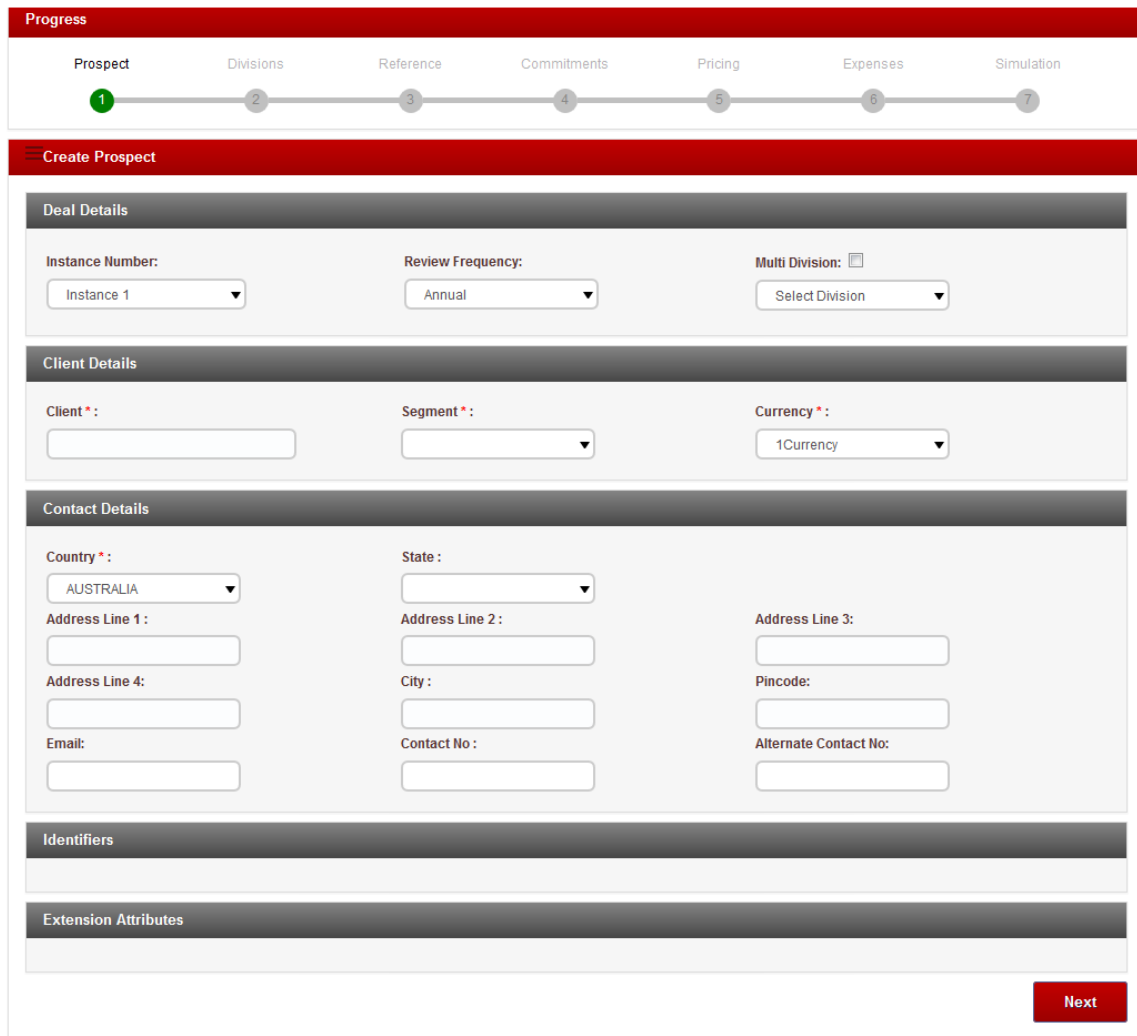


Figure 17: Create Prospect

Enter following attributes of the prospect customer:

- Deal Details
- Client Details
- Contact Details
- Identifiers
- Extension Attributes

The main fields on the page are:

#### Deal Details

Fields	Explanation
Instance Number	Select the source instance in which the prospect is created
Review Frequency	Select how frequently the deal requires review Values available are: <ul style="list-style-type: none"> <li>• Annual</li> <li>• Monthly</li> <li>• Weekly</li> </ul>
Multi Division	Select this checkbox if the prospect has operations in multiple divisions or not
Division	Select a division for the customer
	<b>Note:</b> If you select Multi Division checkbox, you cannot select Division here.

#### Client Details

Fields	Explanation
Client	Enter the Client name
Segment	Select the Customer segment to which the prospect belongs
Currency	Select the currency preferred by the prospect

Rest of the fields on the page are self-explanatory.

**Note:** When you click Next, the prospect is created. The rest of the pages within the wizard are used for collecting additional details required for creating a deal for the prospect and is explained in section [1.10](#).

### 1.4.3 Viewing the List of Deals

Click on the My Deals link to view all deals created by you as well as the deals assigned to you for approval or acceptance.

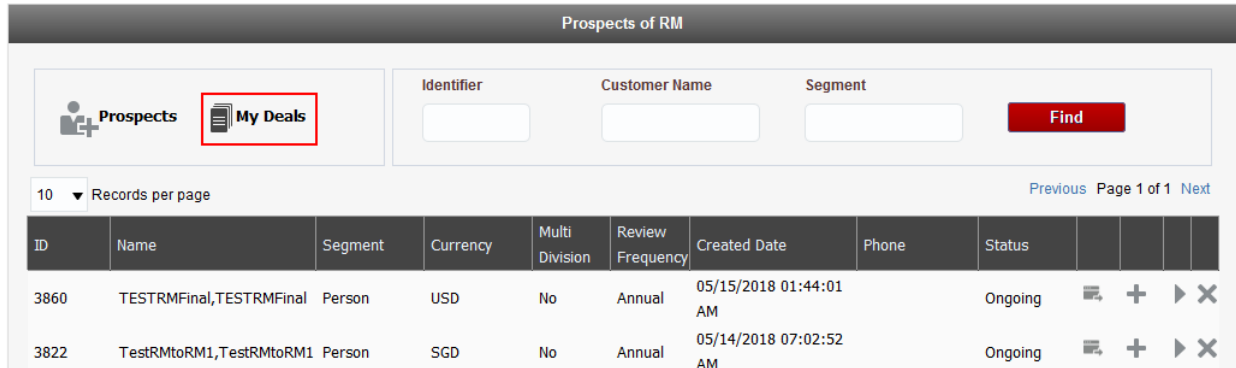


Figure 18: My Deals Link

This takes you to the Deal Management Home page.

### 1.4.4 Editing the Prospect Details

To edit the details of a prospect, click on the Edit Prospect button  against them in the Prospects list.

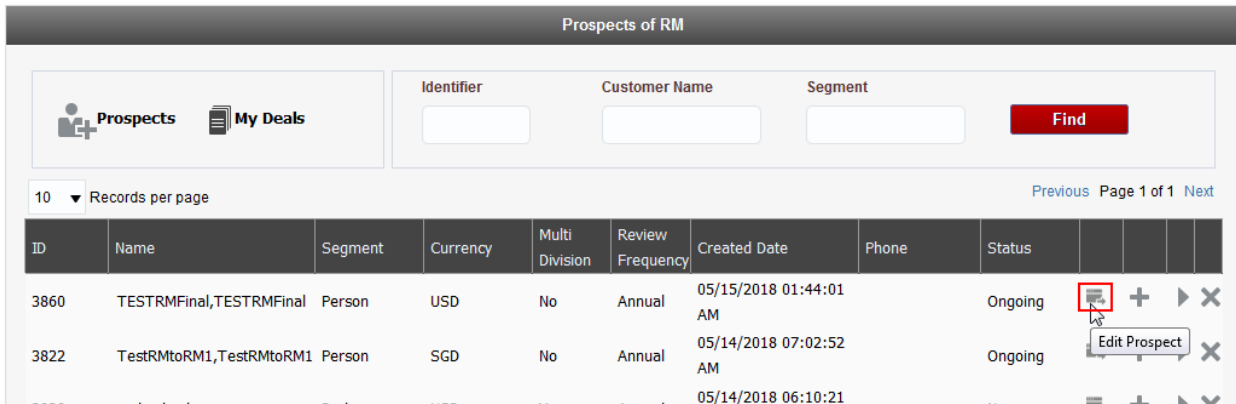


Figure 19: Edit Prospect Button

This takes you to the Prospect Creation page, where you can edit and change all details of the prospect.

### 1.4.5 Creating a New Deal for a Prospect

To create a new deal for a prospect, click on the New Deal button  against them in the Prospects list.

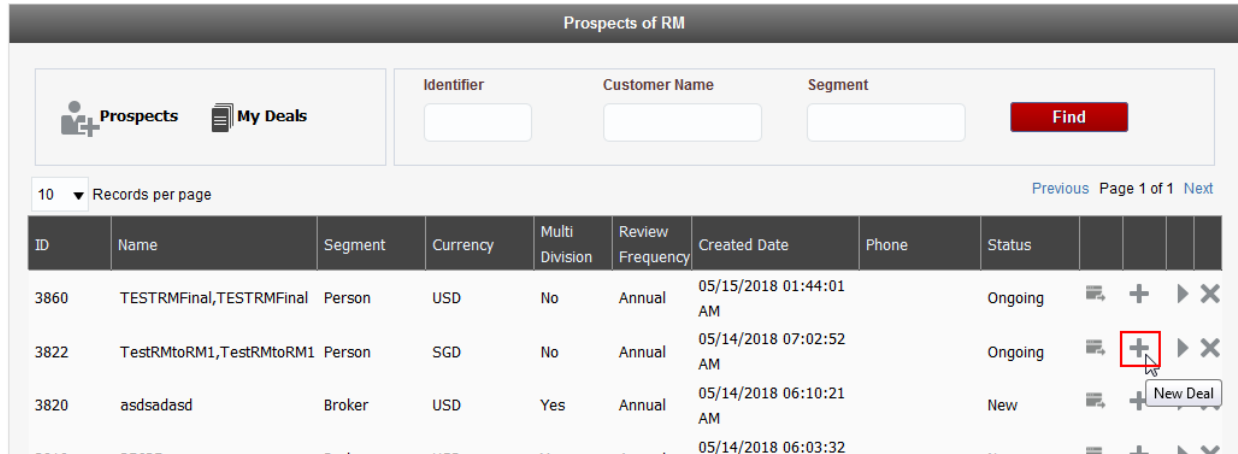


Figure 20: New Deal Button

This takes you to the second step of Deal Creation process.

### 1.4.6 Viewing the Deals of a Prospect

To view the list of deals created for a prospect, click on the Details button against them in the Prospects list.

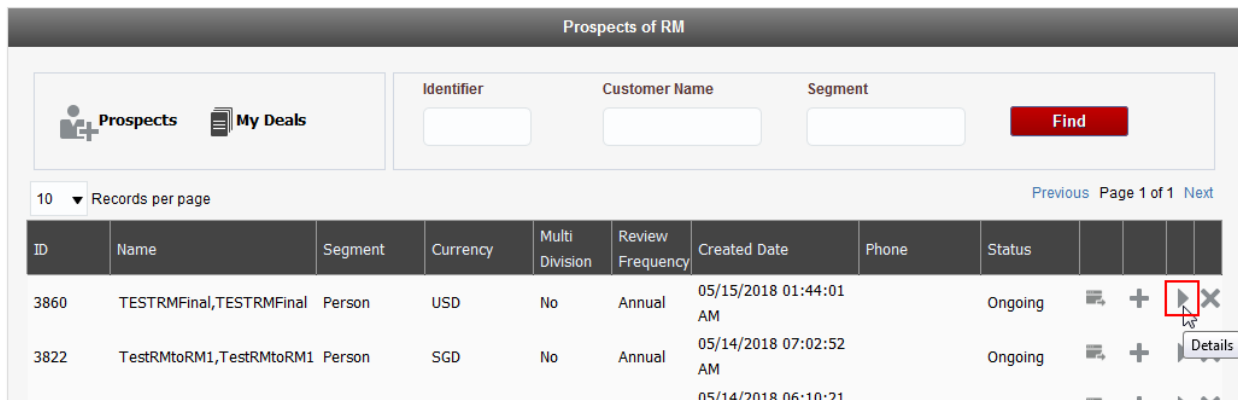


Figure 21: Details Button

The page lists all the deals created for the selected prospect, along with View/Edit, Copy, and Delete options against each deal.

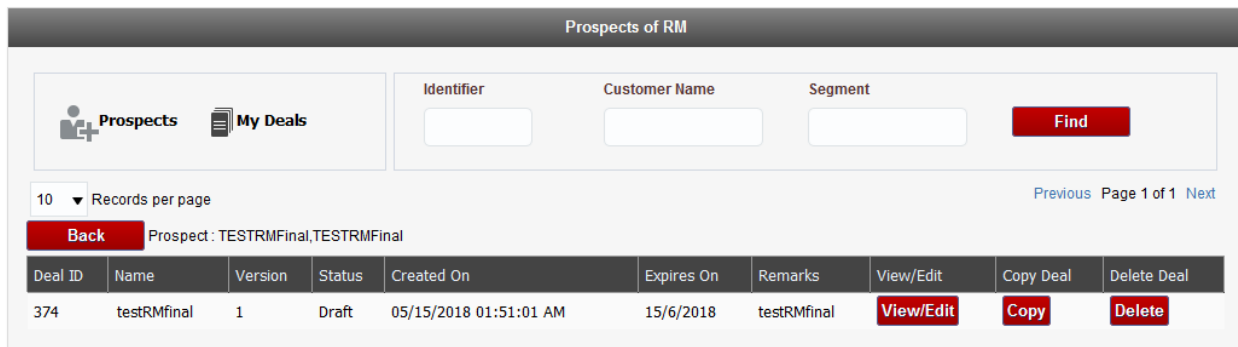


Figure 22: List of Deals



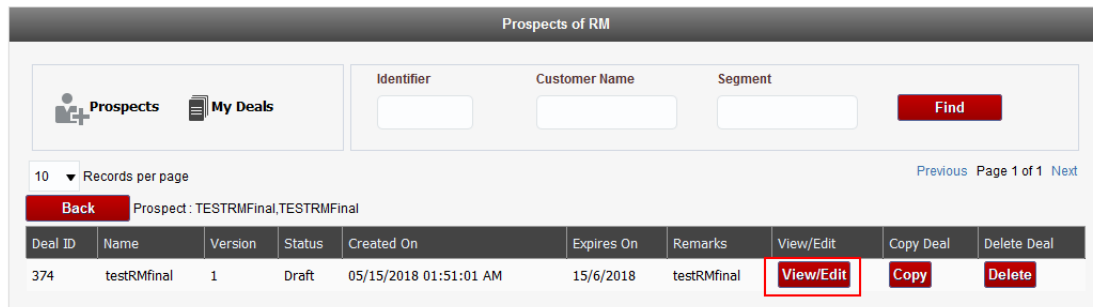
- Click on the View/Edit button to view details of a deal from step 2 (Divisions) of the process.
- Click on the Copy button to copy and create a new deal from the existing deal.
- Click on the Delete button to delete the deal.

## 1.4.7 Viewing or Editing Details of a Prospect's Deal

To view or edit a prospect's deal, follow the procedure below:

**Note:** You can edit only those deals that are in Draft / Rejected / Declined status. Editing is restricted to Simulation page of Deal Creation wizard. You cannot edit any other detail.

1. Navigate to the Deal Management dashboard and click My Prospects button. The My Prospects page lists all prospect customers under the Relationship Manager.
2. Click on the Details button against a prospect to view their deals.
3. Click View/Edit button against a deal to view or edit a deal. This opens the Deal Creation wizard at Divisions page (step 2).



**Figure 23: View or Edit button**

4. Navigate through the pages of Deal Creation wizard to view all details of the deal. However, please note that you can edit only the Simulation page.
5. If required, simulate the pricing details of the deal in the Simulation page (step 7) and click Save to save the deal.
6. Submit the deal to push it through the approval workflow. Once approved, you can apply back the deal details to source system.

**Important:** Editing an approved deal generates a new version of the deal and it has to go through the approval cycle before it can be applied back.

## 1.4.8 Copying a Prospect's Deal

To copy a prospect's deal to create a new deal, follow the procedure below:

1. Navigate to the Deal Management dashboard and click My Prospects button. The My Prospects page lists all prospect customers under the Relationship Manager.
2. Click on the Details button against a prospect to view their deals.
3. Click Copy button against a deal to copy the deal details to create a new deal.

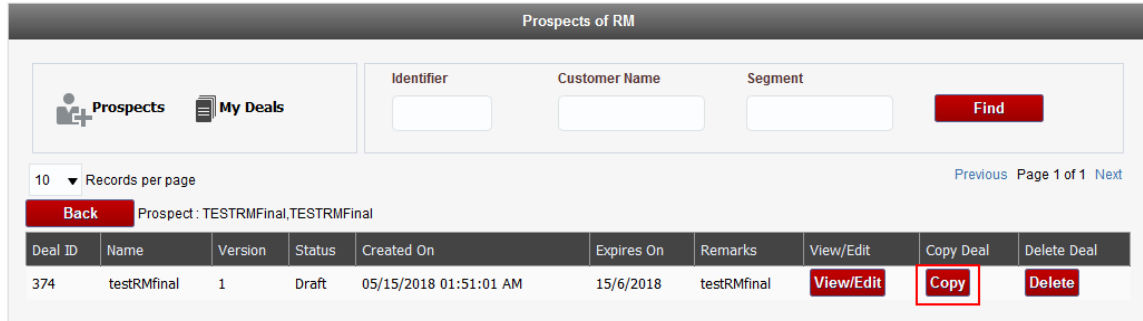


Figure 24: Copy button

This opens the Deal Creation wizard at Divisions page (step 2).

4. Navigate through the pages of Deal Creation wizard and edit the prepopulated details of the deal.
5. Click Save to save the new deal for the same prospect.

### 1.4.9 Deleting a Deal

You can delete a prospect's deal, provided the deal status is not 'Applied Back'. To delete a deal, follow the procedure below:

1. Navigate to the Deal Management dashboard and click My Prospects button. The My Prospects page lists all prospect customers under the Relationship Manager.
2. Click on the Details button against a prospect to view their deals.
3. Click Delete button against a deal to delete it. If the deal is in 'Applied Back' status, you will not be able to delete it.

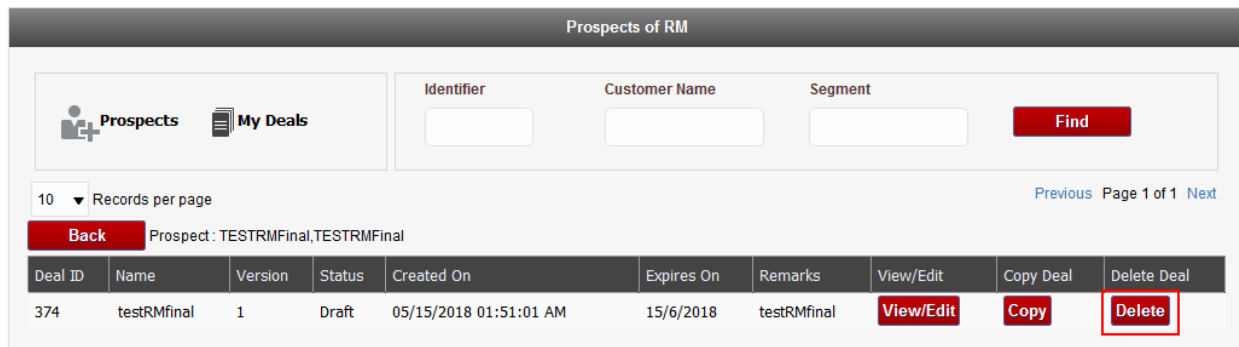


Figure 25: Delete button

### 1.4.10 Deleting a Prospect

You can delete a prospect customer by clicking the My Prospects link on Deal Management dashboard. Against each prospect listed on this page, there is a Delete button to delete the prospect customer. The prospects are deleted promptly, provided there are no deals that are in 'Applied Back' status.

**Important:** Please note that when you delete a prospect, system also deletes all associated deals of the prospect, provided they are not in 'Applied Back' status; in which case the prospect is not deleted.

Prospects of Weblogic

Prospects My Deals

Identifier Customer Name Segment Find

10 Records per page Previous Page 1 of 11 Next

Name	Segment	Currency	Multi Division	Review Frequency	Created Date	Phone	Status				
_01,Vamsi	Person	USD	No	Annual	04/25/2018 11:47:03 AM		New		+	▶	✕
test,Current	Person	USD	No	Annual	04/25/2018 11:16:56 AM		New		+	▶	✕
Trial	Business	USD	No	Monthly	04/20/2018 11:23:38 AM		Ongoing		+	▶	✕
Livingston2,James	Person	USD	No	Annual	04/18/2018 11:41:38 AM		Ongoing		+	▶	✕
Livingston,James	Person	USD	No	Annual	04/18/2018 11:27:37 AM		Ongoing		+	▶	✕
Deal Tester 100	Business	USD	No	Annual	04/16/2018 07:52:07 PM		Ongoing		+	▶	✕
Deal Tester 01	Business	USD	No	Annual	04/16/2018 07:34:07 PM		Ongoing		+	▶	✕
_01,TestPer	Person	USD	No	Annual	04/13/2018 05:18:00 PM		Ongoing		+	▶	✕
varsha11,Varsha	Person	USD	No	Annual	04/13/2018 05:01:44 PM		Ongoing		+	▶	✕

Figure 26: Delete Prospects

## 1.5 My Customers

A relationship manager can view their customers by clicking on the My Customers link on Deal Management dashboard.

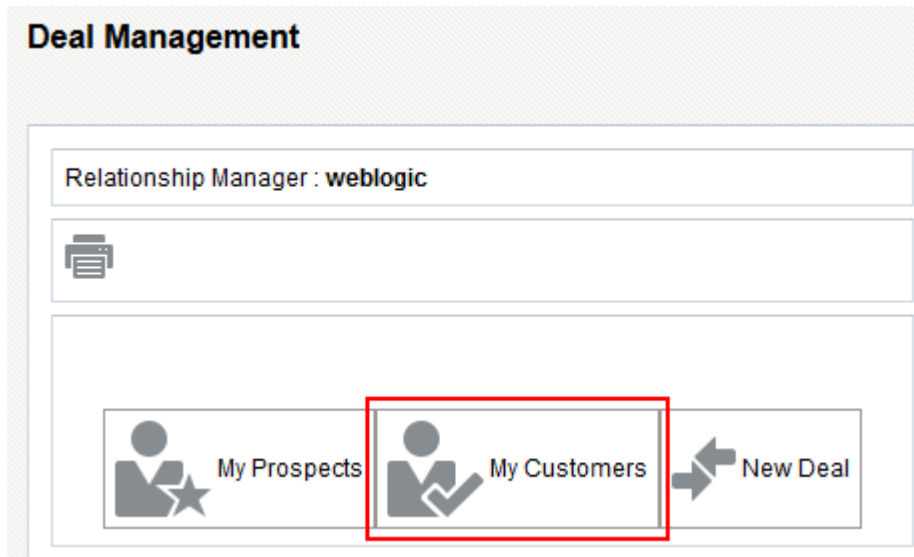
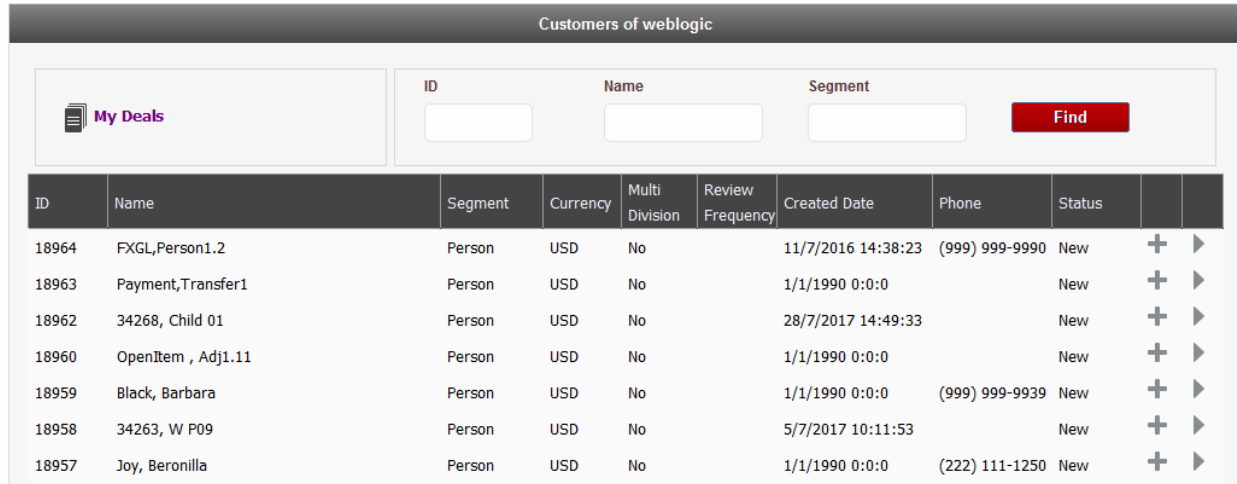


Figure 27: My Customers link

When you click the My Customers link, you will see the list of all customers under the relationship manager listed.

**Note:** If you have been delegated access rights of another RM through access control definition, then you can view their customers and prospects also. To do this, select their user name in RM filter field on the page.




ID	Name	Segment	Currency	Multi Division	Review Frequency	Created Date	Phone	Status		
18964	FXGL,Person1.2	Person	USD	No		11/7/2016 14:38:23	(999) 999-9990	New	+	▶
18963	Payment,Transfer1	Person	USD	No		1/1/1990 0:0:0		New	+	▶
18962	34268, Child 01	Person	USD	No		28/7/2017 14:49:33		New	+	▶
18960	OpenItem , Adj1.11	Person	USD	No		1/1/1990 0:0:0		New	+	▶
18959	Black, Barbara	Person	USD	No		1/1/1990 0:0:0	(999) 999-9939	New	+	▶
18958	34263, W P09	Person	USD	No		5/7/2017 10:11:53		New	+	▶
18957	Joy, Beronilla	Person	USD	No		1/1/1990 0:0:0	(222) 111-1250	New	+	▶

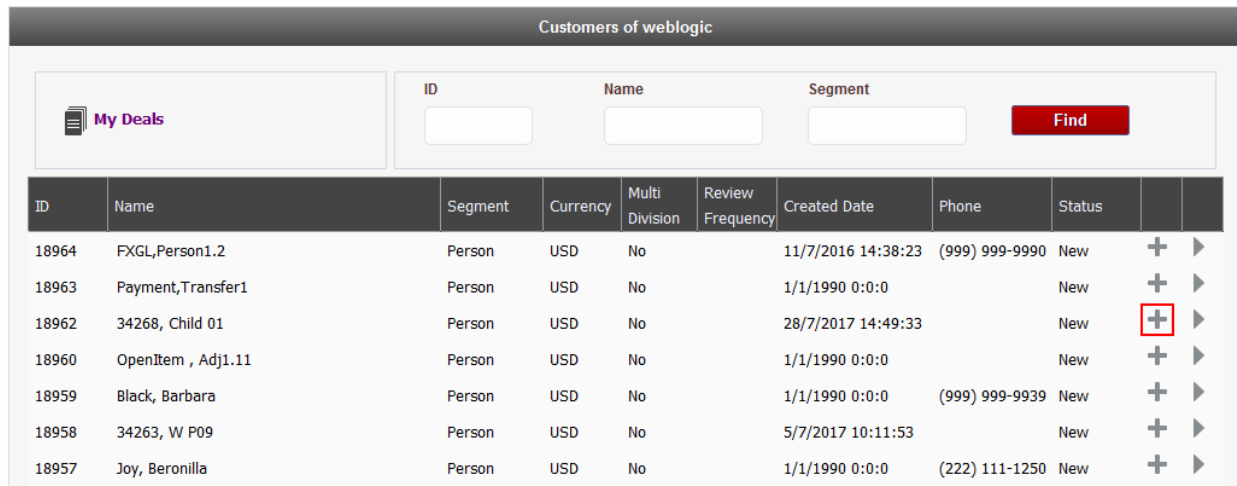
Figure 28: Customers List

From this page, you can perform the following actions:

- Create a new deal for a customer
- View deals of a customer

### 1.5.1 Creating a Deal for a Customer

To create a new deal for a customer, click on the New Deal button  against them in the Customers list.



ID	Name	Segment	Currency	Multi Division	Review Frequency	Created Date	Phone	Status		
18964	FXGL,Person1.2	Person	USD	No		11/7/2016 14:38:23	(999) 999-9990	New	+	▶
18963	Payment,Transfer1	Person	USD	No		1/1/1990 0:0:0		New	+	▶
18962	34268, Child 01	Person	USD	No		28/7/2017 14:49:33		New	+	▶
18960	OpenItem , Adj1.11	Person	USD	No		1/1/1990 0:0:0		New	+	▶
18959	Black, Barbara	Person	USD	No		1/1/1990 0:0:0	(999) 999-9939	New	+	▶
18958	34263, W P09	Person	USD	No		5/7/2017 10:11:53		New	+	▶
18957	Joy, Beronilla	Person	USD	No		1/1/1990 0:0:0	(222) 111-1250	New	+	▶

Figure 29: Create Deal Button

This takes you to the second step of the Deal Creation process.

### 1.5.2 Viewing Deals of a Customer

To view deals of a customer, click on the View Deals button  against them in the Customers list.

ID	Name	Segment	Currency	Multi Division	Review Frequency	Created Date	Phone	Status		
18964	FXGL,Person1.2	Person	USD	No		11/7/2016 14:38:23	(999) 999-9990	New	+	▶
18963	Payment,Transfer1	Person	USD	No		1/1/1990 0:0:0		New	+	▶
18962	34268, Child 01	Person	USD	No		28/7/2017 14:49:33		New	+	▶
18960	OpenItem , Adj1.11	Person	USD	No		1/1/1990 0:0:0		New	+	▶
18959	Black, Barbara	Person	USD	No		1/1/1990 0:0:0	(999) 999-9939	New	+	▶
18958	34263, W P09	Person	USD	No		5/7/2017 10:11:53		New	+	▶
18957	Joy, Beronilla	Person	USD	No		1/1/1990 0:0:0	(222) 111-1250	New	+	▶

Figure 30: View Deals Button

This shows you a list of deals created for the customer, along with options to View or Edit the deals.

## 1.6 New Deal

A relationship manager can create a prospect and a deal in one go by clicking on the New Deal button on Deal Management dashboard.

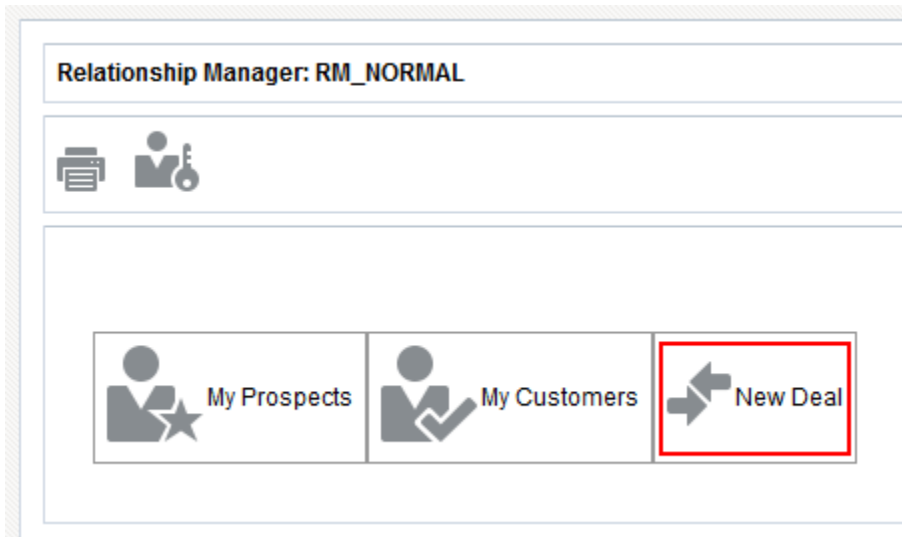


Figure 31: New Deal button

When you click on the New Deal button, the first step (Prospect) of Deal Creation wizard appears. You can follow the wizard to create a prospect and a deal.

**Note:** If you have been delegated access rights of another RM through access control definition, then you can create a prospect and deal for them also. To do this, select their user name in RM filter field on the page.

## 1.7 Created Deals

The Home page of Deal Management dashboard includes the Created Deals list that includes all deals created by the Relationship Manager during the selected period.

Deals Created Between 06/01/2018 and 06/30/2018									
Created Deals Assigned Deals									
	Deal ID	Deal Name	Client	Client Status	Currency	Created On	Expires On	Deal Status	
<input type="checkbox"/>	1184	Big Mart - Deal2	Big Mart	Prospect	USD	06/07/2018 3:57:05 AM	07/06/2018	Draft	
<input type="checkbox"/>	1137	Big Mart - Deal1	Big Mart	Prospect	USD	06/07/2018 3:49:08 AM	07/06/2018	Approved	
<input type="checkbox"/>	1099	Mega Mart - Deal2	Mega Mart	Prospect	USD	06/07/2018 3:27:47 AM	06/06/2018	Expired	
<input type="checkbox"/>	1051	Mega Mart - Deal1	Mega Mart	Prospect	USD	06/07/2018 3:10:09 AM	07/06/2018	Draft	

Compare Reassign

Figure 32: Created Deals List

**Note:** If you have been delegated access rights of another RM through access control definition, then you can view their deals also. To do this, select their user name in RM filter field on the page.

From this list, you can perform the following actions:

- View various versions of a Deal
- Compare two Deals
- Reassign a Deal to another RM (This option is available only for administrator users.)

**Note:** Please note that you can perform the above actions for another Relationship Manager's deals if they have delegated access to you through Access Control Definition. To do this, select their name in the RM field on Deal Management home page.

### 1.7.1 Viewing Versions of a Deal

To view various versions of a deal, go to Deal Management dashboard and click View Versions button against the deal.

Deals Created Between 06/01/2018 and 06/30/2018									
Created Deals Assigned Deals									
	Deal ID	Deal Name	Client	Client Status	Currency	Created On	Expires On	Deal Status	
<input type="checkbox"/>	1184	Big Mart - Deal2	Big Mart	Prospect	USD	06/07/2018 3:57:05 AM	07/06/2018	Draft	
<input type="checkbox"/>	1137	Big Mart - Deal1	Big Mart	Prospect	USD	06/07/2018 3:49:08 AM	07/06/2018	Approved	
<input type="checkbox"/>	1099	Mega Mart - Deal2	Mega Mart	Prospect	USD	06/07/2018 3:27:47 AM	06/06/2018	Expired	
<input type="checkbox"/>	1051	Mega Mart - Deal1	Mega Mart	Prospect	USD	06/07/2018 3:10:09 AM	07/06/2018	Draft	

Compare Reassign

Figure 33: View Versions Button

All available versions of the selected deal are listed in the page. From this page, you can perform following actions:

- View details of the deal
- Print / Export details of the deal
- Compare the deal with a competitor pricelist
- Forecast the revenue from the deal
- View the approval workflow for the deal
- Submit the deal for approval
- Accept or decline the deal
- Copy the deal details to create a new one
- Compare two versions of the same deal

### 1.7.2 Comparing Two Deals

To compare two or more deals, follow the procedure below:

1. Navigate to the Deal Management dashboard and Created Deals list.
2. Select two or more deals that you want to compare.
3. Click the Compare button.

Deals Created Between 06/01/2018 and 06/30/2018									
Created Deals   Assigned Deals									
	Deal ID	Deal Name	Client	Client Status	Currency	Created On	Expires On	Deal Status	
<input checked="" type="checkbox"/>	1184	Big Mart - Deal2	Big Mart	Prospect	USD	06/07/2018 3:57:05 AM	07/06/2018	Draft	
<input type="checkbox"/>	1137	Big Mart - Deal1	Big Mart	Prospect	USD	06/07/2018 3:49:08 AM	07/06/2018	Approved	
<input checked="" type="checkbox"/>	1099	Mega Mart - Deal2	Mega Mart	Prospect	USD	06/07/2018 3:27:47 AM	06/06/2018	Expired	
<input type="checkbox"/>	1051	Mega Mart - Deal1	Mega Mart	Prospect	USD	06/07/2018 3:10:09 AM	07/06/2018	Draft	

Compare Reassign

Figure 34: Compare Deals Button

4. The page displays a side-by-side comparison of selected deals.

Compare Models			
	Products	AK,Test1234 (Version: 1)	AK,Test123 (Version: 1)
	ACH Credit	\$202.00	\$2,020.00
	ACH Debit	\$75.75	\$757.50

Figure 35: Compare Deals Results

## 1.8 Assigned Deals

The Home page of Deal Management dashboard includes an Assigned Deals list that includes all deals that are assigned to the Relationship Manager for approval or acceptance, during the selected period. The list is similar to the Created Deals and you can view the deal details and compare various deals.

**Note:** If you have been delegated access rights of another RM through access control definition, then you can view their assigned deals also. To do this, select their user name in RM filter field on the page.

## 1.9 Admin

The Home page of Deal Management dashboard includes an Admin tab that is exclusively for RM Administrator users. This tab is not available for other users of the dashboard. The Admin tab allows administrator users to:

- View all deals that are pending in Deal Approval Workflow
- Reassign deals that are in following status: Pending Approval, Pending Customer Acceptance, Pending Apply Back
- Release lock from locked deals

### 1.9.1 Reassigning Deals

Unplanned absence or unavailability of an approver results in a deal pending for a long time in the approval workflow. In such cases, an administrator user can reassign the deal from one user to another to avoid further delay in approval.

To reassign a deal from one user to another, the administrator can follow the procedure below:

1. Log on to ORMBA as an RM administrator user and navigate to the Deal Management dashboard.
2. In the Deal Management Home page, click Admin tab. You can see a list of all deals that are pending approvals/ customer acceptance / apply back.
3. Click Reassign button against a deal to reassign it from one RM user to another.

### 1.9.2 Releasing Lock from Deals

When an approval workflow definition includes a role for an approval level (rather than a user), the deal appears in the Assigned Deals tab of all users with the specified role and an approver needs to first lock the deal for their approval and then proceed with the actual approval.

If the approver, after locking a deal for approval, goes on unplanned absence or unavailability, the deal is stuck in the approval level, as it is unavailable to other approvers for approval. In such cases, an administrator user can unlock the deal from the approver and make it available to rest of the users of same role.

To release the approval lock from one approver and make the deal available to other approver users, follow the procedure below:

1. Log on to ORMBA as an administrator user and navigate to the Deal Management dashboard.



2. In the Deal Management Home page, click Admin tab. You can see a list of all deals that are pending approvals/ customer acceptance / apply back.
3. Click Release Lock button against a deal to make it available for other approvers.

## 1.10 Deal Creation Wizard

The deal creation wizard helps you create a prospect and a deal in one go. To access the Deal Creation Wizard, navigate to the Deal Management dashboard and click on the New Deal button.

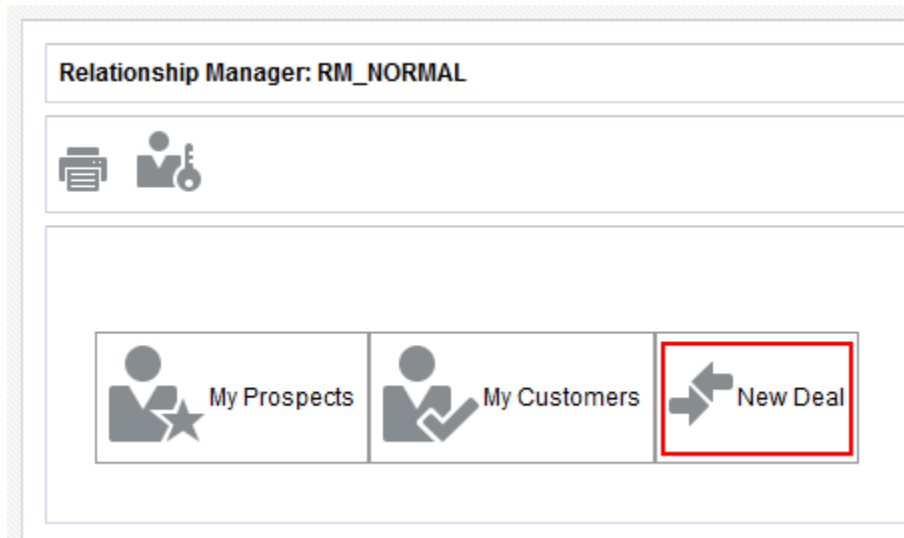


Figure 36: New Deal button

Deal Creation Wizard includes seven steps, each of which are detailed in the following sections:

1. Create Prospect
2. Select Division(s)
3. (Optional) Reference Customer
4. Enter Commitments
5. Select Pricelist
6. Define Expenses or Costs
7. Simulate Pricing and Save

### 1.10.1 Create Prospect

The first step of Deal Creation Wizard includes collecting information for creating a prospect customer. The main details being collected are grouped under following sections:

- Deal Details: This section collects information like source system instance, deal review frequency, and division (if the prospect has operations in only one division). You can also indicate if the prospect has operations in multiple divisions.
- Client Details: This section collects information like the Name of the client, the customer segment to which they belong, and their corporate currency.

- **Contact Details:** This section collects information like the Country, State, Address lines, Email ID, and Contact numbers.
- **Identifiers:** This section collects customer specific identifiers like Social Security Number, if it is required and configured using ORMBA Admin UI.
- **Extension Attributes:** This section collects extension attributes of the prospect, if it is configured using ORMBA Admin UI.

Once the required details are entered, click Next to move to the next step of Deal Creation Wizard.

**Important:** Please note that clicking Next on this page (step1) automatically creates the prospect in the system, and some details like the Division (in case of single division) cannot be edited henceforth.

## 1.10.2 Customer Hierarchy

The second step of Deal Creation Wizard allows you to:

- (Optional) Select applicable divisions
- Create Prospect Hierarchy
- Select Product(s)





If you have already selected the division in step 1, the wizard displays the selected division in step 2 by default. On the other hand, if you have indicated the prospect to be operating in multiple divisions in step 1 of Deal Creation Wizard, you can select the divisions in this step.

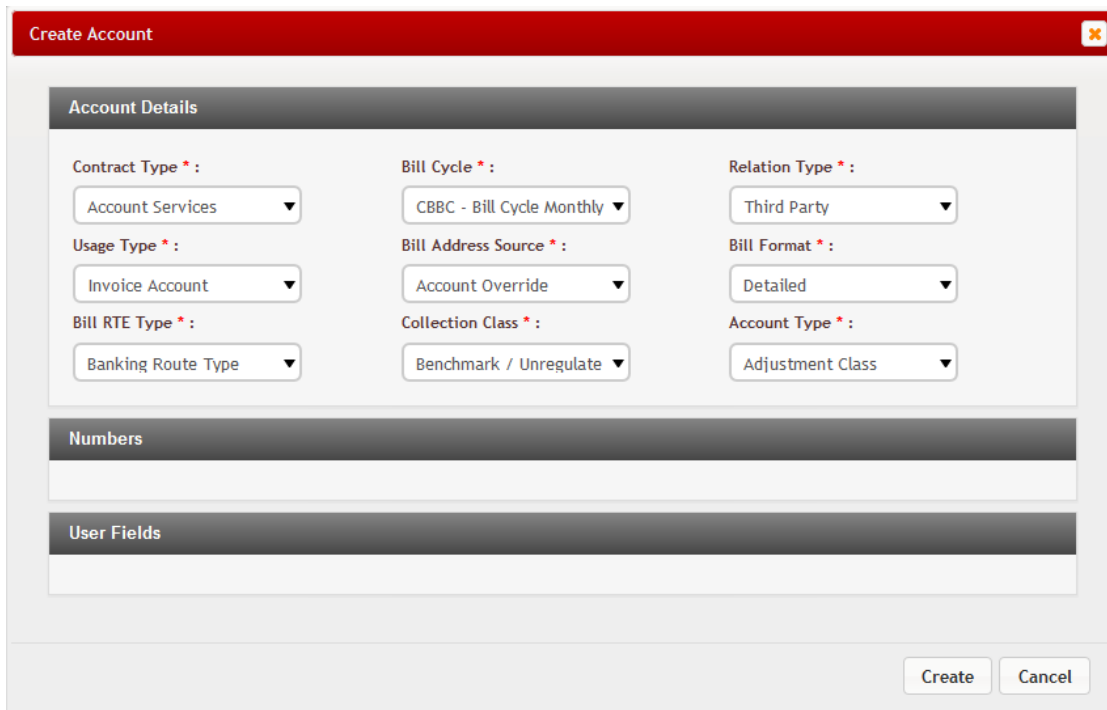
The screenshot displays the 'Divisions' step of the Deal Creation Wizard. At the top, a red 'Progress' bar shows three steps: 'Prospect' (1), 'Divisions' (2), and 'Reference' (3). Below this is a 'Choose Divisions' section with a search bar and a 'Search' button. The main area is titled 'Customer Hierarchy' and lists several divisions with checkboxes, edit icons, and plus signs:

- IBN [CAD] ✎ +
- Illinois [United States Dollars] ✎ +
- Accrual Division 1 [1Currency] ✎ +
- Invoice Construct - D1 [United States Dollars] ✎ +
- Banking Functionality Division 5 [FT GL 1D] ✎ +
- Banking division 03 [United States Dollars] ✎ +
- SC1-Settlement Construct [United States Dollars] ✎ +
- CBB - Division 02 [United States Dollars] ✎ +

**Figure 37: Divisions Page**

This page creates a hierarchy for the prospect. To create the customer hierarchy and associate products to each account within the hierarchy, follow the procedure below:

4. Open the second page of Deal Creation Wizard. This shows the Client name under the Customer Hierarchy section.
5. Click Rename  button against the Client Name to give a new name to the parent customer of the hierarchy.
6. Click on the Client Name to expand the hierarchy to show all applicable divisions in the system.
7. Select the required division and click Rename  button against the division to give a new name to the child customer being created at the division level.
8. Click Create Account  button against a division to create an account  under the selected division. This opens the Create Account pop up where you can configure the account details.



**Create Account**

**Account Details**


Contract Type * :	Bill Cycle * :	Relation Type * :
Account Services	CBBC - Bill Cycle Monthly	Third Party
Usage Type * :	Bill Address Source * :	Bill Format * :
Invoice Account	Account Override	Detailed
Bill RTE Type * :	Collection Class * :	Account Type * :
Banking Route Type	Benchmark / Unregulate	Adjustment Class

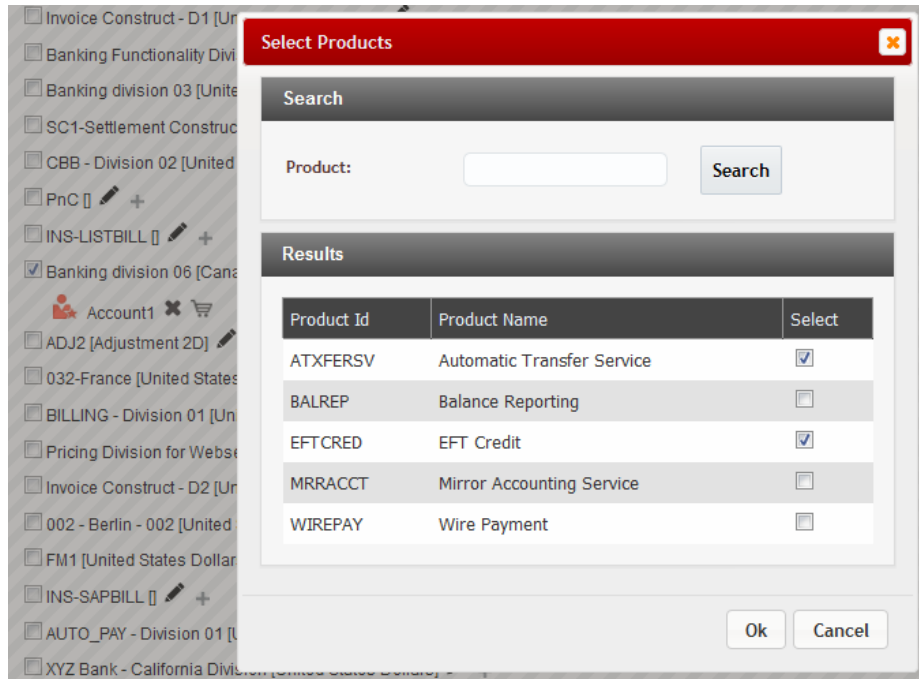
**Numbers**

**User Fields**

Create Cancel

**Figure 38: Create Account Pop Up**

9. Configure the account attributes in the pop up and click Create. This adds a new account to the Customer Hierarchy.
10. Click Select Products  button against an account to associate one or more products to the account. This opens the Select Products window wherein you can search and select one or more products.



**Figure 39: Select Products Pop Up**

11. Click Delete **X** button to remove an account from the customer hierarchy.
12. Repeat steps 6 and 7 to select all applicable divisions, create accounts under each division, and to associate products against each account.
13. Once you have finished creating the desired hierarchy for the prospect, and selected products for each account, click Next.

### 1.10.3 Choose a Reference

The third step of Deal Creation Wizard lets you select a reference customer or model for creating a new deal. When you select a reference customer or model, its commitment and usage is pre-populated in the deal.

System identifies the reference customer or model based on the Division, Segment and Currency chosen for the Deal in the first step of Deal Creation Wizard.

This is an optional step and you can skip this step by selecting the 'Skip this step' check box at the bottom of the page.

**Progress**

Prospect   Divisions   **Reference**   Commitments   Pricing   Expenses   Simulation

1   2   3   4   5   6   7

**Choose a Reference**

Customer

**Matching Customers**

Identifier	Name	Division	Segment	Currency	Email	Select	Period
1509418655	Smith, John	California	Person	United States Dollars		<input type="radio"/>	<input type="text"/>
4546772926	Manual,Accrual_Seema_4	Illinois	Person	United States Dollars		<input type="radio"/>	<input type="text"/>
3091198377	Manual_Accrual,Seema	Illinois	Person	United States Dollars		<input type="radio"/>	<input type="text"/>
6857937359	Seema,AW_Manual_Accrual	Illinois	Person	United States Dollars		<input type="radio"/>	<input type="text"/>
9087253133	Seema,Accrual_AWF1	Illinois	Person	United States Dollars		<input type="radio"/>	<input type="text"/>
0011894756	Seema,Accrual_AWP_Manual_BL_CD	Illinois	Person	United States Dollars		<input type="radio"/>	<input type="text"/>
3497721491	Seema,Accrual_BL_BD_N_Retest1	Accrual Division 1	Person	United States Dollars		<input type="radio"/>	<input type="text"/>
4151061125	Seema,Accrual_Batch_Test_Reversal	Illinois	Person	United States Dollars		<input type="radio"/>	<input type="text"/>
6805487447	Seema,Accrual_CD_BL_BC_N	Accrual Division 1	Person	United States Dollars		<input type="radio"/>	<input type="text"/>
9580894346	Seema,Accrual_PI_BC_N	Illinois	Person	United States Dollars		<input type="radio"/>	<input type="text"/>

Skip this step

Prev   Next

**Figure 40: Select Reference Customer**

To select a reference customer, follow the procedure below:

1. Open the third page of Deal Creation Wizard.
2. Select a Reference Customer from the available list.
3. Alternatively, you can select a reference model. To do this, select Model from the drop down list. This lists the matching models in the system.

**Choose a Reference**

Customer

Customer

Model

Identifier   Name

**Figure 41: Select Reference Model**

4. Enter the reference period in number months.
5. Click Next.

### 1.10.4 Enter Commitments

The fourth step of Deal Creation Wizard allows you to enter commitments against the usage factors of the products you have selected in step 2. You can enter both commitment value and period in months.

If you have selected a reference customer or reference model in step 3, then the commitment value and period appear prepopulated.

If you are creating a deal for an existing customer, then system prepopulates their average monthly usage for the previous year on this page.

To enter commitment values and period, select each product. This expands the node to display its SQIs. Against each SQI, enter the commitment value and period in months.


If you have selected multiple divisions in step 2, select each division from the drop down list and select its corresponding accounts. If there are multiple accounts under a division, select each account from the drop down list and enter commitments for each product selected for the account.

**Note:** If required, you can use the Charge Code field to search and find a product.

Once you have entered commitment values and periods against each SQI, against each product, under each account, click Next to proceed further with deal creation.

## 1.10.5 Attach Pricing


The fifth step of Deal Creation Wizard lets you attach pricelists to a customer, or a division, or an account, or a product.

To attach pricelist to a customer, division (child customer), or an account, click on the Choose Pricelist button  against it.



**Figure 42: Choose Pricelist Button**

The pricelist attached to a child customer overrides that at a parent customer, whereas the one attached at an account level overrides that at child and parent customer levels.

However, if you would like to attach pricelist at a product level, click on the Choose Pricelist for each Product button  against the account. This opens a pop-up where in you can select pricelist for each product. The pricelist selected against a product overrides the ones selected at account level, child customer level, and parent customer level. Repeat this for each of the accounts you have selected.

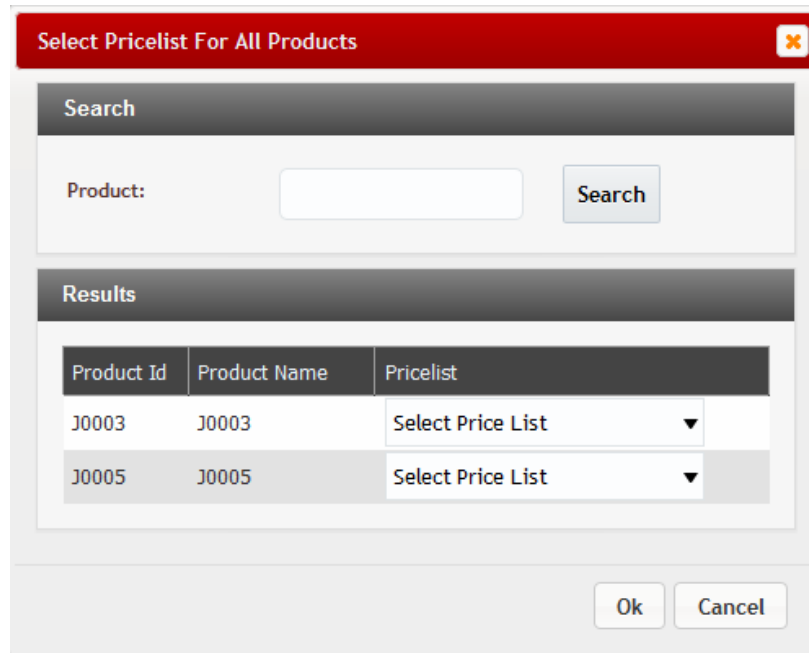


Figure 43: Select Pricelist For All Products

### 1.10.6 Add Expenses

The sixth step of Deal Creation Wizard allows you to add expenses to a deal. Various expenses are grouped together and configured using ORMB Admin UI as a Cost Group, which is available for selection in this page. Against each cost group, there are many costs associated, of which some costs are deal-specific, or some against a price item or a price variation. When you select a cost group, the cost definitions associated to it are available in the grid below.

You can also use the Customer and Accounts filters to refine the cost definitions listed in the grid. When you select a customer or an account, only those cost definitions that are specific to that customer or account are available for selection.

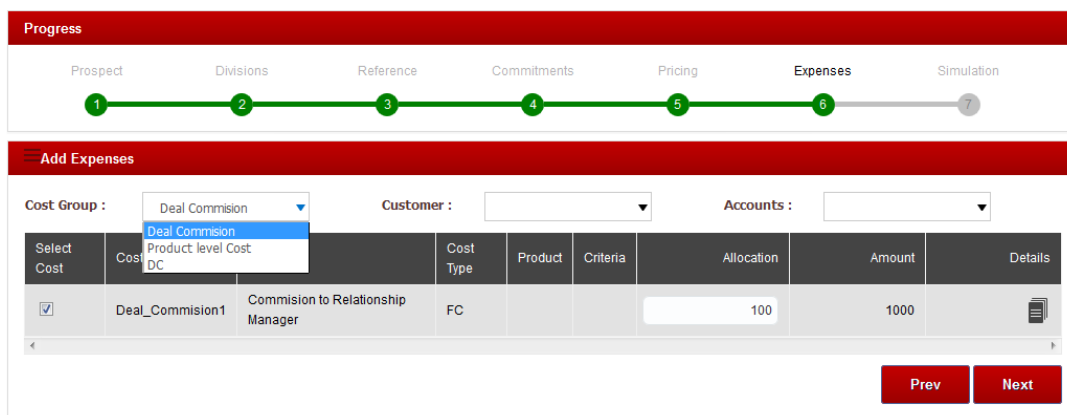


Figure 44: Select Cost Group

**Note:** By default, all cost definitions appear selected. You need to un-select those definitions that are not applicable for the deal.

Select the costs / expenses that you want to apply on the deal. Against each cost, specify the percentage allocation for the deal. This attribute allows you to customize the expense value for a deal.

Cost Group : Deal Commision Customer : Accounts :

Select Cost	Cost Code	Cost	Cost Type	Product	Criteria	Allocation	Amount	Details
<input checked="" type="checkbox"/>	Deal_Commission1	Commision to Relationship Manager	FC			100	1000	

Figure 45: Percentage Allocation of Expense Amount

**Note:** To view more details of a cost definition like the type and computation model, click on the Details button.

After you have selected the costs to be associated with the deal, click Next.

### 1.10.7 Deal Simulation

The last step of Deal Creation Wizard involves simulating the deal to optimize the pricing. The page lists the customer hierarchy you have created up to the product level along with the revenue, cost, and profitability.

**Progress**

Prospect (1) — Divisions (2) — Reference (3) — Commitments (4) — Pricing (5) — Expenses (6) — Simulation (7)

---

**Create Deal**

**Deal Simulation**

Product Search

Customer Hierarchy	Usage Unit	Usage	Avg. Price	Original			Projected			Revenue Impact (%)	Details
				Rev.	Cost	Discount (%)	Profitability (%)	Rev.	Cost		
Parker, Peter				29,550.00	250.00	0	99				
California (USD)				1,575.00		0	100				
Account opening Fees				50.00		0	100			0	
Transaction Fees				1,525.00		0	100			0	
Illinois (USD)				27,975.00	250.00	0	99				
J0003				27,960.00		0	100			0	
J0005				15.00	250.00	0	>100			0	
Deal Commision				0.00	1000.00	0	0			0	
Commision to Relationship Manager				0.00	1000.00	0	0			0	

Prev Reset Discount Margin Mass Change Simulate Save

Figure 46: Deal Simulation Step

Click on a product to view the price variations within it, and against each price assignment line, click on the Details button to initiate simulation.



Tier level Operations

^ Price Recommendations

Division	Segment	Minimum Price	Average Price	Maximum Price
930-California Branch	Person	10	10	10
	Person	10	10	10
930-California Branch		10	10	10

**CHARGES**

Tier Type	Rate Type	Pricing Metric	Total Usage	Unit Cost	Standard Price
Step ▼	Unit Rate ▼	Transaction Volume ▼	2,000		

Pricing Criteria
Source Assignments

Redefine Tier

	Lower Limit	Upper Limit	Usage	Price	Amount
+	0	100	100	8	800.00
+	0	100	100	8	800.00
+	100	10,000	900	5	4,500.00
+	100	10,000	900	5	4,500.00
+	10,000	9,999,999,999	0	5	0.00
+	10,000	9,999,999,999	0	5	0.00

Ok
Cancel

**Figure 47: Tier Level Operations**

The Tier Level Operations pop-up opens and it includes the price recommendations, charges, and pricing criteria for the selected price assignment.

The Price Recommendation table lists the minimum, maximum, and average price applied for each of the combinations of division and customer segment. This would help you arrive at an optimum pricing for the pricing combination.

The Charges section includes the pricing methodology applied along with the Pricing Criteria. Pricing Methodology includes the Tier Type (Flat / Step / Threshold), Rate Type (Absolute Amount / Unit Rate / Percentage / Basis Points / Annual Interest Rate), Pricing Metric (Transaction Volume, Value, etc.), Total Usage, Unit Cost, and Standard Price. The Pricing Criteria displays the pricing rule applied for the price assignment.

On this page, you can perform the following simulation operations:

- Change Tier Type

- Change Rate Type
- Change Pricing Metric
- Change Total Usage
- Redefine Tier (in case of Step or Threshold pricing)
- Split into Two or Four (in case of Step or Threshold pricing)
- Merge with Above or Below (in case of Step or Threshold pricing)

Once you perform the required simulation operation, click Ok to return to the Deal Creation Wizard. You can repeat this step to each of the product and the price assignments within it. Once you have performed all the required operations, click Simulate to view the results of the simulation operation. To know more about Simulation Operations, see section [1.11](#).

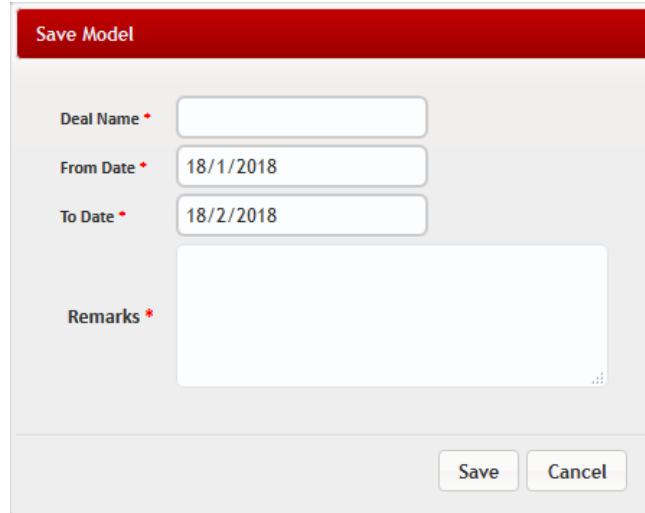
Deal Simulation													
Product		Search											
Customer Hierarchy	Usage Unit	Usage	Avg. Price	Original				Projected				Revenue	Details
				Rev.	Cost	Discount (%)	Profitability (%)	Rev.	Cost	Discount (%)	Profitability (%)	Impact (%)	
Parker, Peter				29,550.00	250.00	0	99	30,016.00	250.00	0	99	2	
California (USD)				1,575.00		0	100	1,575.00		0	100	0	
Account opening Fees				50.00		0	100	50.00		0	100	0	
Transaction Fees				1,525.00		0	100	1,525.00		0	100	0	
Illinois (USD)				27,975.00	250.00	0	99	28,441.00	250.00	0	99	2	
30003				27,960.00		0	100	28,426.00		0	100	2	
30005				15.00	250.00	0	>100	15.00	250.00	0	>100	0	
Deal Commission				0.00	1000.00	0	0	0.00	1000.00	0	0	0	
Commission to Relationship Manager				0.00	1000.00	0	0	0.00	1000.00	0	0	0	

**Figure 48: Simulation Results**

The Projected and Revenue Impact sections of the Deal Creation Wizard are populated with values after simulation. You can keep simulating the pricing, until you achieve the desired Revenue Impact or Profitability.

**Note:** You can also perform additional simulation operations like applying a discount (%) or margin (%), or performing a mass change. To know more about these operations, see sections [1.11.2](#), [1.11.3](#), and [1.11.4](#) respectively. If you want to reset the pricing to that prior to simulation, click Reset button.

Click Save to save the deal. You need to enter details like Deal Name and the validity period. The validity period defines the period of time beyond which the deal expires.



The 'Save Model' dialog box features a red header bar with the title 'Save Model'. Below the header, there are four input fields: 'Deal Name \*' (empty), 'From Date \*' (18/1/2018), 'To Date \*' (18/2/2018), and 'Remarks \*' (empty text area). At the bottom right, there are two buttons: 'Save' and 'Cancel'.


Figure 49: Save Model

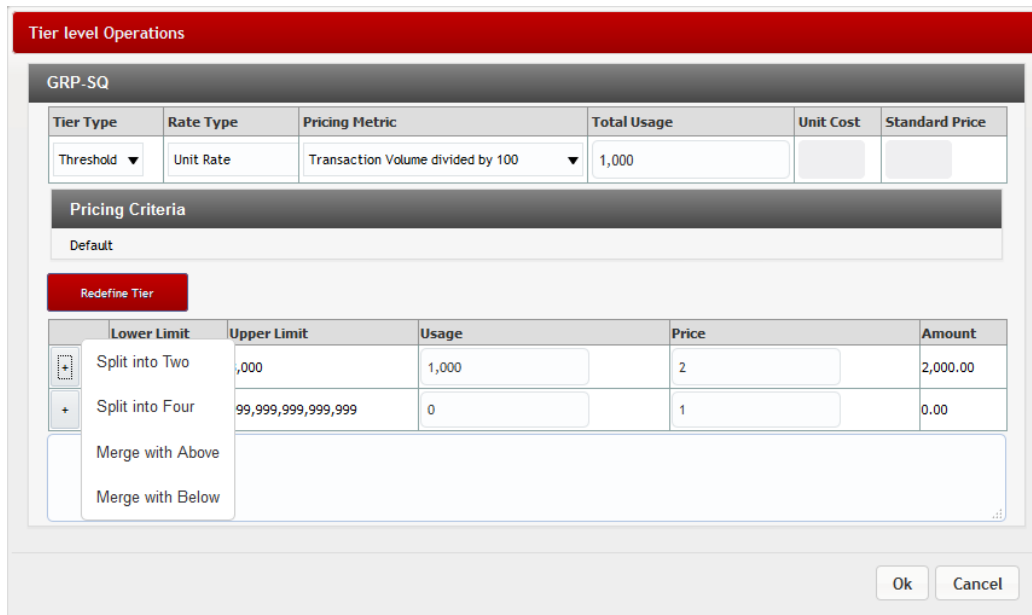
Once you click Save, specify whether you would like to view the deal. You click either Yes to view the deal, or No to return to the Deal Home page.

## 1.11 Deal Simulation Operations

While trying to create a deal, you can perform several deal simulation operations to predict the desired revenue impact or profitability. The main operations are listed below.

### 1.11.1 Simulating the Pricing Rule

While creating a deal, the last step involves simulating the pricing rules to achieve the desired profitability. To do this, you need to click the Details  button against each price assignment. This opens the Tier Level Operations pop-up window, wherein you can perform the simulation operations.



The 'Tier level Operations' dialog box has a red header bar with the title 'Tier level Operations'. Below the header, there is a section for 'GRP-SQ' containing a table with columns: Tier Type, Rate Type, Pricing Metric, Total Usage, Unit Cost, and Standard Price. The 'Tier Type' is set to 'Threshold', 'Rate Type' is 'Unit Rate', 'Pricing Metric' is 'Transaction Volume divided by 100', and 'Total Usage' is '1,000'. Below this table is a 'Pricing Criteria' section with a dropdown set to 'Default'. A red 'Redefine Tier' button is located below the pricing criteria. At the bottom, there is another table with columns: Lower Limit, Upper Limit, Usage, Price, and Amount. The table contains two rows: 'Split into Two' (Lower Limit: ,000, Upper Limit: ,000, Usage: 1,000, Price: 2, Amount: 2,000.00) and 'Split into Four' (Lower Limit: ,000, Upper Limit: 99,999,999,999, Usage: 0, Price: 1, Amount: 0.00). Below the table are two options: 'Merge with Above' and 'Merge with Below'. At the bottom right, there are 'Ok' and 'Cancel' buttons.

### Figure 50: Tier Level Operations

You can perform the following simulation operations against a price assignment:

- **Change Tier Type:** The tier types available are Flat, Step, and Threshold. You can change the tier type to change the computation model.
- **Change Rate Type:** The rate types available are Absolute Amount, Unit Rate, Percentage, Basis Points, and Annual Interest Rate.
- **Change Pricing Metric:**
- **Change Total Usage:** By default, the usage field displays the monthly average commitment value given in step 4 of Deal Creation Wizard. You can edit the usage
- **Change Price:** You can change price of a tier to a new value.
- **Split into Two or Four** (in case of Step or Threshold pricing): You can split a tier into two or four and the tier limits changes accordingly. The Usage is plotted correctly to the newly created tiers. Please note that you cannot perform split tier operations multiple times to the same tier.
- **Merge with Above or Below** (in case of Step or Threshold pricing): You can merge a tier with the one above it or below it. When merged, the corresponding usage values are also cumulated.
- **Redefine Tier** (in case of Step or Threshold pricing): This option lets you create a new tier definition from scratch. Clicking this button clears all tiers, including the price and usage values.

### 1.11.2 Simulating Discount

While creating a deal, you can simulate the scenario where a discount percentage is applied to each of the products, or at a deal level. To do this, click the Discount button at the Deal Simulation step (Step 8) of Deal Creation Wizard.

Product	Discount %
P0011	<input type="text"/>
P0013	<input type="text"/>

Figure 51: Apply Discount

You can simulate by applying discount at two levels:

- Discount in price or usage for each product in the deal
- Total discount in price or usage for the entire deal

After mentioning the discount percentage against each product, or the total discount percentage at the deal level, click Simulate. The page refreshes to show the simulation results. Click Save to save the changes to the model.

### 1.11.3 Simulating Margin

While creating a deal, you can simulate the scenario where a margin percentage is applied to each of the products, or at a deal level. To do this, click the Margin button at the Deal Simulation step (Step 8) of Deal Creation Wizard.

Product	Margin %
P0011	<input type="text"/>
P0013	<input type="text"/>

Total Margin	<input type="text" value="2"/>
--------------	--------------------------------

**Figure 52: Apply Margin**

You can simulate by applying margin at two levels:

- Margin in price or usage for each product in the deal
- Total margin in price or usage for the entire deal

After mentioning the margin percentage against each product, or the total margin percentage at the deal level, click Simulate. The page refreshes to show the simulation results. Click Save to save the changes to the model.

### 1.11.4 Simulating Mass Change

While creating a deal, you can simulate the scenario where a mass change is applied to each of the products, or to the deal. To do this, click the Mass Change button at the Deal Simulation step (Step 8) of Deal Creation Wizard.

Mass Change

Change by Price

Product Level
   
 Deal Level

Product	Change %
Account opening Fees	
J0005	
J0003	

Change %

Simulate Cancel

**Figure 53: Mass Change**

You can simulate by applying mass change at two levels:

- Mass change in price or usage for each product in the deal
- Mass change in price or usage for the entire deal

After mentioning the mass change percentage against each product, or the mass change percentage at the deal level, click Simulate. The page refreshes to show the simulation results. Click Save to save the changes to the model.

## 1.12 Deal Management Reports

The Deal Management module of ORMBA offers several reports for its users. The following sections details the various alerts, metrics and reports that are available for a user to view and in certain cases, export.

### 1.12.1 Alerts

Deal Management module offers three different types of alerts to its users. The following sections explain the alerts details.

#### 1.12.1.1 Deal Alerts

The Deal Alerts are available within the Deal Management dashboard. On the top right corner of the Deal Management home page, a relationship manager can view the alerts related to their deals. The RM can click on the alert to navigate directly to the deal in question.

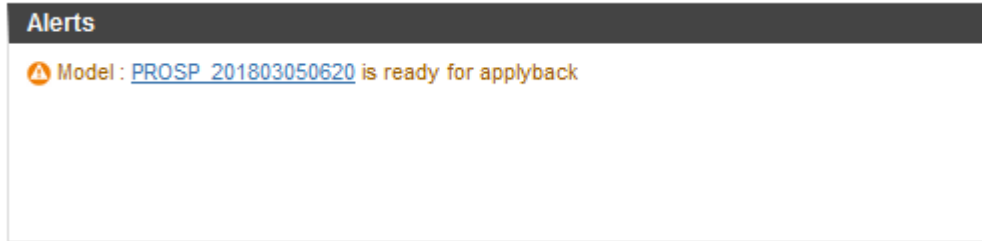


Figure 54: Deal Alerts

The alerts in this section inform the RM regarding the pending actions or status changes of the deals created or modified by them.

### 1.12.1.2 Relationship Manager's Alerts

The Relationship Manager's Alerts are available within the Relationship Manager dashboard. On the Summary page of the RM dashboard, you can find an Alerts box that includes alerts related to deals, like:

- Deals pending client acceptance
- Deals pending approval
- Deals approaching expiry

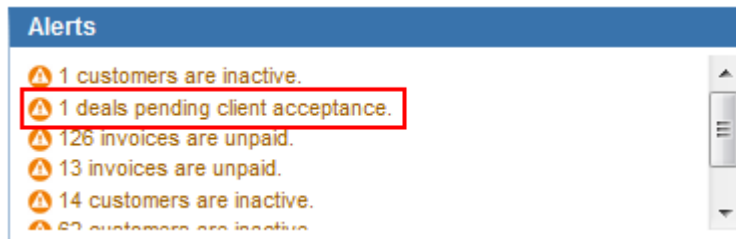


Figure 55: Relationship Manager's Alerts

### 1.12.1.3 Commitment Alerts

The Customer page within the Relationship Manager dashboard has an alert box that includes information about how much a customer has fulfilled their commitments.

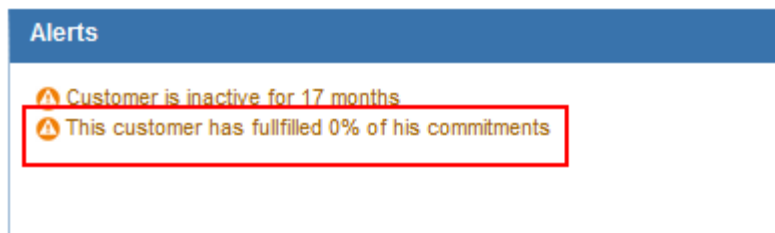


Figure 56: Commitment Alerts

The percentage variation of the customer's revenue from their committed values during deal creation is included in the alert message.

## 1.12.2 List of Created Deals

The Home page of Deal Management dashboard includes the Created Deals list that includes a list of all deals created by the Relationship Manager, irrespective of whether you have submitted them for approval or not, during the selected period.

Deals Created Between 06/01/2018 and 06/30/2018									
Created Deals									
Deal ID	Deal Name	Client	Client Status	Currency	Created On	Expires On	Deal Status		
<input type="checkbox"/>	1184	Big Mart - Deal2	Big Mart	Prospect	USD	06/07/2018 3:57:05 AM	07/06/2018	Draft	
<input type="checkbox"/>	1137	Big Mart - Deal1	Big Mart	Prospect	USD	06/07/2018 3:49:08 AM	07/06/2018	Approved	
<input type="checkbox"/>	1099	Mega Mart - Deal2	Mega Mart	Prospect	USD	06/07/2018 3:27:47 AM	06/06/2018	Expired	
<input type="checkbox"/>	1051	Mega Mart - Deal1	Mega Mart	Prospect	USD	06/07/2018 3:10:09 AM	07/06/2018	Draft	

Compare Reassign

Figure 57: Created Deals List

From this list, you can perform the following actions:

- View various versions of a Deal
- Compare two or more Deals
- Reassign one or more deals to another RM
- View and Edit Deal Details
- Print Deal Details
- Compare the Deal with a Competitor Pricelist
- Forecast revenue from the Deal
- View workflow details of the Deal
- Copy the Deal details to create a new Deal
- Submit the Deal for approval (if not yet submitted)
- Approve/Reject or Accept/Decline a Deal (based on the current status of the deal)

## 1.12.3 List of Assigned Deals

The Home page of Deal Management dashboard includes Assigned Deals tab that lists all deals that are assigned to the Relationship Manager for approval or acceptance, during the selected period.

Deals Created Between 06/01/2018 and 06/30/2018									
Assigned Deals									
Deal ID	Deal Name	Client	Client Status	Currency	Created On	Expires On	Deal Status		
<input type="checkbox"/>	1137	Big Mart - Deal1	Big Mart	Prospect	USD	06/07/2018 3:49:08 AM	07/06/2018	Approved	

Compare Reassign

Figure 58: Assigned Deals List



This list is similar to the Created Deals and you can perform the following actions:

- View Deal Details
- Print Deal Details
- Compare the Deal with a Competitor Pricelist
- Compare one or more Deals
- Reassign one or more Deals to another RM
- Forecast revenue from the Deal
- View workflow details of the Deal
- Copy the Deal details to create a new Deal
- Approve/Reject or Accept/Decline a Deal (based on the current status of the deal)

### 1.12.4 Administrator's List of Deals

The Home page of Deal Management dashboard contains the Admin tab that lists all deals in the system that are in approval queue. This list allows the Administrator user to reassign a deal to another user for workflow approval.



Created Deals	Assigned Deals	Admin							
Deal ID	Deal Name	Client	Client Status	Created On	Expires On	Deal Status	Remarks		
<input type="checkbox"/>	2387	PROSP_201803050620	PROSP_201803050620	Prospect	03/05/2018 6:27:06 PM	04/05/2018	Approved	PROSP_201803050620	

Figure 59: Admin List

The Administrator user can click the Reassign button  to assign the deal from one user to another for the current stage of approval.

### 1.12.5 Deal Management Printable Report

The Home page of Deal Management includes the facility to generate a printable report of the deals you have created. The report displays all your deals grouped by the month on which they were created. You can click on the Print link at the bottom of the report to export the details into either a Printable PDF or Printable HTML file.

**Printable Report**

Year 2018 Month April

Deal ID	Deal Name	Client	Client Type	Division	Deal Status	Created Date	Expiry Date	Approved/Rejected Date	Client Accepted/Declined Date	Ageing (Days)	Remarks
4288	test3	test3	Prospect	Multi Division	Expired	4/2/2018 12:22:58 PM	5/2/2018 12:00:00 AM				3333
4398	test11	test11	Prospect	Multi Division	Declined	4/10/2018 4:04:48 PM	5/10/2018 12:00:00 AM		4/26/2018 3:06:31 PM		11
4537	New Deal Apr 19	New Deal Apr 19 3	Prospect	California	In Workflow	4/19/2018 3:06:08 PM	5/19/2018 12:00:00 AM				v1
4561	rajappan	rajappan	Prospect	California	Approved	4/19/2018 3:59:24 PM	5/19/2018 12:00:00 AM	4/30/2018 1:47:57 PM			1
4579	Pune AZ	Pune	Prospect	California	Approved	4/19/2018 6:10:56 PM	5/19/2018 12:00:00 AM	5/2/2018 2:38:52 PM			jhu
4609	201804221643	201804221643	Prospect	California	Approved	4/22/2018 4:53:15 PM	5/22/2018 12:00:00 AM	5/2/2018 2:30:55 PM			201804221643
4620	201804221655	201804221655	Prospect	California	Applied Back	4/22/2018 4:57:27 PM	5/22/2018 12:00:00 AM				V10
4633	test11	test11	Prospect	Multi Division	Draft	4/26/2018 3:51:49 PM	5/26/2018 12:00:00 AM				7 ds
4724	Pune11	pune11,pune11	Prospect	California	Approved	4/30/2018 12:17:20 PM	5/30/2018 12:00:00 AM	4/30/2018 12:24:17 PM			Pune

Year 2018 Month March

Deal ID	Deal Name	Client	Client Type	Division	Deal Status	Created Date	Expiry Date	Approved/Rejected Date	Client Accepted/Declined Date	Ageing (Days)	Remarks
4218	PPRTest	.xx	Prospect	California	In Workflow	3/30/2018 12:02:52 PM	4/30/2018 12:00:00 AM				pr
4245	Test	p,p	Prospect	California	Expired	3/30/2018 1:27:38 PM	4/30/2018 12:00:00 AM				d
4253	201803300131	201803300131	Prospect	California	Expired	3/30/2018 1:32:14 PM	4/30/2018 12:00:00 AM				201803300131

Year 2018 Month May

Deal ID	Deal Name	Client	Client Type	Division	Deal Status	Created Date	Expiry Date	Approved/Rejected Date	Client Accepted/Declined Date	Ageing (Days)	Remarks
4781	dddd	d,d	Prospect	California	Draft	5/2/2018 3:30:51 PM	6/2/2018 12:00:00 AM			1	ddd

Print

**Figure 60: Deal Management Printable Report**

If a deal is in workflow, you can click on the Deal Status field and navigate to the deal’s workflow report.

### 1.12.6 Deal Approval Workflow Report


The Deal Management module contains a comprehensive report of the approval workflow in which a deal is going through, which includes the number of stages and the approver users of each stage. Once the deal advances through the approval workflow, the report logs details like, the approver / rejecter and the actual date and time of status change.

Model ID	Model Name	Created By
2387	PROSP_201803050620	RM1

Workflow	Owner	Action	Timestamp	Remarks	Document URL
Submit	RM1	Submitted	March 05, 2018 06:33:08 PM	PLEASE APPROVE	
Branch 1 Approval	APP1	Approved	March 05, 2018 06:33:34 PM	aprvd	
Branch 1 Approval	APP2	Approved	March 05, 2018 06:43:47 PM	aprvd	
Customer Acceptance	RM1	Accepted	March 05, 2018 06:48:31 PM	acpted	
Apply Back	RM1	Pending			


**Figure 61: Deal Approval Workflow Report**

The Deal Approval Workflow report is available to all approvers of the workflow, along with the Deal Creator. If the approvers or creator provides URL to approval documents, the same will also be available for reference in the report.

To view the Deal Approval Workflow report, navigate to the Created Deals/Assigned Deals list and select the deal. Against the deal, click the View Workflow  report.

### 1.12.7 Deal Printable Report

The Deal Management module includes a detailed printable report of the deal. This report is available in two formats: Internal and External. The Internal report includes all details of the report including projected revenue, profitability, along with the offered price, whereas the External report shows only the products, price and commitments.

To print a deal report, navigate to the Created Deals/ Assigned Deals list and select the deal. Against the deal, click the Print  button.

The details available in the External report are:

- Demographic details like Customer Name, Segment, Division and Currency
- Deal creation details like the deal name and whether it is for an existing customer or a prospect customer; along with the deal creator's name and creation date and time, and the current status of the deal
- List of Products, with their usage factor, pricing rule, price, and commitments
- Summary of total number of products and the number of products committed

The details available in the Internal report are:

- Demographic details like Customer Name, Segment, Division and Currency
- Deal creation details like the deal name and whether it is for an existing customer or a prospect customer; along with the deal creator's name and creation date and time, and the current status of the deal
- List of Products, with their usage factor, pricing rule, associated costs, usage, current and proposed price, current and proposed revenue, current and proposed profitability, current and proposed discount
- Summary of total revenue – current and proposed, their difference, and the percentage impact on revenue
- Total number of products and the number of products committed, along with total profitability and discount percentage

### 1.12.8 Deal Metrics

The Relationship Manager dashboard includes several key deal-related metrics. The main metrics available are:

- **#Deals Created:** Number of deals created by the Relationship Manager in the selected month and year
- **#Deals Won:** Total Number of deals created by the Relationship Manager that have been accepted by the Customer in the selected month and year

- **#Deals Open:** Number of deals created by the Relationship Manager that are pending approval in the selected month and year

### 1.12.9 Actuals vs Committed Report

The Customer page of Relationship Manager Dashboard includes a report that lets the Relationship Manager track the actual performance of the customer against their commitments.

The report shows the list of products used by the Customer during the selected month and year, along with a side-by-side comparison of their committed and actual values for Revenue, Usage, and Profitability. The RM can also view the actual and committed price against each product.

**Figure 62: Actuals Vs Committed Report**