

# PeopleSoft Financials and Supply Chain Management 9.2

## PeopleSoft Enterprise Pricer



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# Contents

## Preface

---

|                                                          |    |
|----------------------------------------------------------|----|
| Understanding the PeopleSoft Online Help and PeopleBooks | i  |
| Using and Managing the PeopleSoft Online Help            | iv |
| PeopleSoft FSCM Related Links                            | iv |
| Contact Us                                               | iv |
| Follow Us                                                | v  |

## 1 Getting Started with Enterprise Pricer

---

|                                       |   |
|---------------------------------------|---|
| Enterprise Pricer Overview            | 1 |
| Common Elements Used in Pricer topics | 1 |
| Enterprise Pricer Implementation      | 2 |

## 2 Understanding Enterprise Pricer

---

|                                                      |    |
|------------------------------------------------------|----|
| Price Determination                                  | 1  |
| Period-To-Date Pricing                               | 4  |
| Reprice or Change Orders                             | 5  |
| Period-To-Date Caps                                  | 5  |
| Period-To-Date Adjustment Review                     | 5  |
| Period-To-Date Pricing Dates                         | 5  |
| Period-To-Date Pricing Setup                         | 5  |
| Cost-Plus Pricing                                    | 6  |
| Weight and Volume Pricing                            | 6  |
| Additional Pricing Options                           | 10 |
| Single-Tiered Pricing Rules                          | 10 |
| Multiple-Tiered Pricing Rules                        | 11 |
| Discounted Giveaways and Buy One, Get One Free Rules | 12 |
| Different Product Pricing and Ordering Units         | 13 |
| Advanced Pricing Calculation in a Price Rule         | 13 |

## 3 Implementing Enterprise Pricer

---

|                                                |   |
|------------------------------------------------|---|
| Understanding Enterprise Pricer Implementation | 1 |
|------------------------------------------------|---|

|                                         |    |
|-----------------------------------------|----|
| (Optional) Setting Up Enterprise Pricer | 3  |
| Pages Used to Set Up Enterprise Pricer  | 3  |
| Understanding Transaction Code Options  | 4  |
| All Price-by Key Fields Page            | 6  |
| Price Transaction Code Page             | 6  |
| Establishing Pricing Options            | 14 |
| Pages Used to Establish Pricing Options | 14 |
| Understanding Pricing Options           | 14 |
| Common Elements Used in This Topic      | 17 |
| Price-by Key Field Page                 | 17 |
| Price List Fields Page                  | 20 |
| Pricing Dates Page                      | 20 |
| Pricing Variables Page                  | 22 |

## 4 Using Pricing Data Enterprise Integration Points

---

|                                               |   |
|-----------------------------------------------|---|
| Understanding Pricing EIPs                    | 1 |
| Pricing EIPs                                  | 1 |
| Methods for Sending Pricing Data              | 4 |
| Staging Tables for Loading Pricing Data       | 4 |
| Sending Pricing Data                          | 5 |
| Page Used to Send Pricing Data                | 6 |
| Publish Pricing Data Page                     | 6 |
| Reviewing and Correcting Pricing Data         | 7 |
| Pages Used to Review and Correct Pricing Data | 7 |
| Understanding the Error Correction Process    | 8 |
| Common Elements Used in This Topic            | 9 |
| Loading Data into Enterprise Pricer           | 9 |
| Page Used to Load Pricing Data                | 9 |
| Load Pricing Data Page                        | 9 |

## 5 Creating Price Lists

---

|                                    |   |
|------------------------------------|---|
| Understanding Price Lists          | 1 |
| Setting Up Price Lists             | 3 |
| Pages Used to Set Up Price Lists   | 3 |
| Common Elements Used in This Topic | 3 |
| Price List Page                    | 4 |
| Related Objects Page               | 6 |

## 6 Creating Price Rules

---

|                                    |    |
|------------------------------------|----|
| Understanding Price Rules          | 1  |
| Rounding Rules                     | 1  |
| Pricing Rules                      | 1  |
| Pricing Formula Scenarios          | 4  |
| Setting Up Price Rules             | 30 |
| Pages Used to Set Up Price Rules   | 30 |
| Conditions Page                    | 30 |
| Formulas Page                      | 34 |
| Expression Validator Page          | 47 |
| Sales Order Price Rule Usage Page  | 47 |
| Setting Up Rounding Rules          | 49 |
| Page Used to Set Up Rounding Rules | 49 |
| Price Rounding Rule Page           | 49 |

## 7 Using the Arbitration Plan

---

|                                       |    |
|---------------------------------------|----|
| Understanding Arbitration Plans       | 1  |
| Arbitration Plans in PeopleSoft SCM   | 1  |
| Basic Arbitration Plans               | 1  |
| Complex Arbitration Plans             | 3  |
| Special Price Action Types            | 9  |
| Setting Up an Arbitration Plan        | 10 |
| Page Used to Set Up Arbitration Plans | 10 |
| Arbitration Plan Page                 | 10 |

## 8 Working With the Pricing Simulator

---

|                                         |   |
|-----------------------------------------|---|
| Understanding the Pricing Simulator     | 1 |
| Running the Pricing Simulator           | 3 |
| Pages Used to Run the Pricing Simulator | 4 |
| Common Elements Used in this Topic      | 4 |
| Simulator Page                          | 5 |

## 9 Updating Price Lists

---

|                                  |   |
|----------------------------------|---|
| Understanding Price List Updates | 1 |
| Prerequisites                    | 3 |
| Updating Price Lists             | 4 |
| Page Used to Update Price Lists  | 4 |
| Price List Extract Page          | 4 |
| Updating Price Lists             | 6 |

|                                  |    |
|----------------------------------|----|
| Exporting Price List Data        | 8  |
| Resetting Price List Data        | 9  |
| Customizing Display Options      | 9  |
| Printing Price List Data Changes | 10 |
| Displaying Price List Charts     | 10 |
| Uploading Price List Data        | 12 |

## 10 Enterprise Pricer Reports

---

|                                   |   |
|-----------------------------------|---|
| Enterprise Pricer Reports: A to Z | 1 |
| Price List Reports                | 1 |
| Product nVision Reports           | 2 |

# Preface

## Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

### Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see *Configuring Context-Sensitive Help Using the Hosted Online Help*.

### Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the [Oracle Software Delivery Cloud](#).

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment. The documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

Installable PeopleSoft Online Help now includes PDF versions of each PeopleBook. For more information, see *Understanding Locally Installed PeopleSoft Online Help*.

### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

### Common Help Documentation

Common help documentation contains information that applies to multiple applications. The three main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications
- Using and Managing the PeopleSoft Online Help

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Finally, *Using and Managing the PeopleSoft Online Help* (this guide) introduces you to the setup, features, and usage of the online help system.

## Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

## Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

| Typographical Convention | Description                                                                                                                                                                                                                                                      |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b><u>Key+Key</u></b>    | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For <b><u>Alt+W</u></b> , hold down the <b><u>Alt</u></b> key while you press the <b><u>W</u></b> key. |
| . . . (ellipses)         | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.                                                                                                                                                             |
| { } (curly braces)       | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (   ).                                                                                                                                                               |
| [ ] (square brackets)    | Indicate optional items in PeopleCode syntax.                                                                                                                                                                                                                    |
| & (ampersand)            | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.                                                                              |

| Typographical Convention | Description                                                                                                                                                                                                                        |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ⇒                        | This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character. |

## ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY\_CD\_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY\_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

## Region, Country, and Industry Identifiers

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

An example of a region-specific heading is: "(Latin America) Setting Up Depreciation"

### Region Identifiers

Regions are identified by the region name. The following are examples of region identifiers that may appear in PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

### Country Identifiers

Countries are identified by a three-letter country code. The following are examples of country identifiers that may appear in the PeopleSoft Online Help:

- ARG (Argentina)
- AUS (Australia)
- CAN (Canada)
- NLD (The Netherlands)

## Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following are examples of industry identifiers that may appear in the PeopleSoft Online Help:

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

## Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

## Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

## PeopleSoft FSCM Related Links

[Oracle Help Center](#)

[Hosted Online Help](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

Financial and Supply Chain Management information for Search Framework search engine can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the Application Fundamentals: Understanding Keyword Search within Components topic.

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Spotlight Series](#)

## Contact Us

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Please include the applications update image or PeopleTools release that you're using.

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# 1

## Getting Started with Enterprise Pricer

### Enterprise Pricer Overview

Enterprise Pricer enables real-time dynamic pricing for quotes, orders and RMAs based on company pricing policies. You can define rules that determine what discounts, surcharges, or product adds apply under specific order conditions, such as products ordered, customer, customer region, and so on. The functionality is designed for pricing and marketing managers and includes the capability for development, testing, deployment, and maintenance of price lists, rules, and arbitration plans. Enterprise Pricer consists of these pricing elements that you use to create a pricing structure:

- Price lists.

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

See [Understanding Price Lists](#).

- Price rules.

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

See [Understanding Price Rules](#).

- Arbitration plans.

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

See [Understanding Arbitration Plans](#).

- Pricing simulator.

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

See [Understanding the Pricing Simulator](#).

### Common Elements Used in Pricer topics

| Term                 | Definition                                                                                                                                                                                   |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Business Unit</b> | An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization. |

| Term                                    | Definition                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Effective Date</b>                   | Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing is July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.                                                 |
| <b>EmplID</b> (employee ID)             | Unique identification code for an individual associated with the organization.                                                                                                                                                                                                                                                                                                                         |
| <b>Language</b> or <b>Language Code</b> | The language in which you want the field labels and report headings of reports to print. The field values appear as you enter them.<br><br>Language also refers to the language spoken by an employee, applicant, or non-employee.                                                                                                                                                                     |
| <b>Process Frequency</b>                | Designates the appropriate frequency in the Process Frequency group box:<br><br><i>Once</i> runs the request the next time that the batch process runs. After the batch process runs, the process frequency is automatically set to <i>Don't Run</i> .<br><br><i>Always</i> runs the request every time that the batch process runs. <i>Don't Run</i> ignores the request when the batch process runs. |
| <b>Process Monitor</b>                  | This button accesses the Process List page, where you can view the status of submitted process requests.                                                                                                                                                                                                                                                                                               |
| <b>Report Manager</b>                   | This button accesses the Report List page, where you can view report content, check the status of a report, and see content detail messages (which describe the report and the distribution list).                                                                                                                                                                                                     |
| <b>Run</b>                              | This button accesses the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.                                                                                                                                                                                                                                                 |
| <b>Run Control ID</b>                   | A request identification that represents a set of selection criteria for a report or process.                                                                                                                                                                                                                                                                                                          |
| <b>SetID</b>                            | An identification code that represents a set of control table information or tablesets. A tableset is a group of tables (records) necessary to define an organization's structure and processing options.                                                                                                                                                                                              |
| <b>User ID</b>                          | The system identifier for the individual who generates a transaction.                                                                                                                                                                                                                                                                                                                                  |

## Enterprise Pricer Implementation

Enterprise Pricer does not require table-loading implementation steps. In the planning phase of an implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, and data models. A complete list of these

resources appears in the preface of the *PeopleSoft Application Fundamentals* with information about where to find the most current version of each.

See the product documentation for *PeopleSoft Application Fundamentals*.

# 2

## Understanding Enterprise Pricer

### Price Determination

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

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

1. Find all price rule conditions that match the transaction line.
2. Check whether the transaction line is list price protected.

For example, in a given sales order, if the order line product price is derived from a price list and the **List Price Protected** is set to Yes, then the apply price rules and arbitration plan steps are skipped and the system assigns the list price to the transaction line.

#### Note

If the transaction line is price protected, the system will not calculate a new price for the line.

3. If the transaction line is not price protected, find a price list for the product on the transaction line.

If the transaction line matches the price list business object or the condition of the price rule that is linked to the price list, the price list is considered for the transaction line.

The best (lowest) price for price lists associated with price list fields is selected if **Consider All Prices** is defined for the application.

The base product price is selected for the list price if the system finds no price defined for the product in the price lists. The system first searches for the base product price by IBU in the transaction (sales order) currency. If none is found, the system searches for the product price by IBU in the base Order Management business unit currency. The base product price is always the default.

#### Note

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

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

1. Check to see whether the transaction line is price protected.

If **Price Protected** is set to Yes, then price formulas (adjustments) are not applied to the transaction line. The net price determination step is skipped, and the system sets the list price and the net price to the same value on the transaction line.

2. If **Price Protected** is set to *No*, then retrieve the price rule conditions that match the transaction line attributes and match their associated price formulas from the price rules.
3. Apply the arbitration plan to filter the list of formulas to only those that apply to the transaction line.

The selected formulas are ones that either end in a decision node or end at the leaf level of the decision tree.

4. After the list of price formulas is narrowed to only the formulas that apply to the transaction line, sort the formulas according to the hierarchy outlined by the arbitration plan.

#### ① Note

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

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

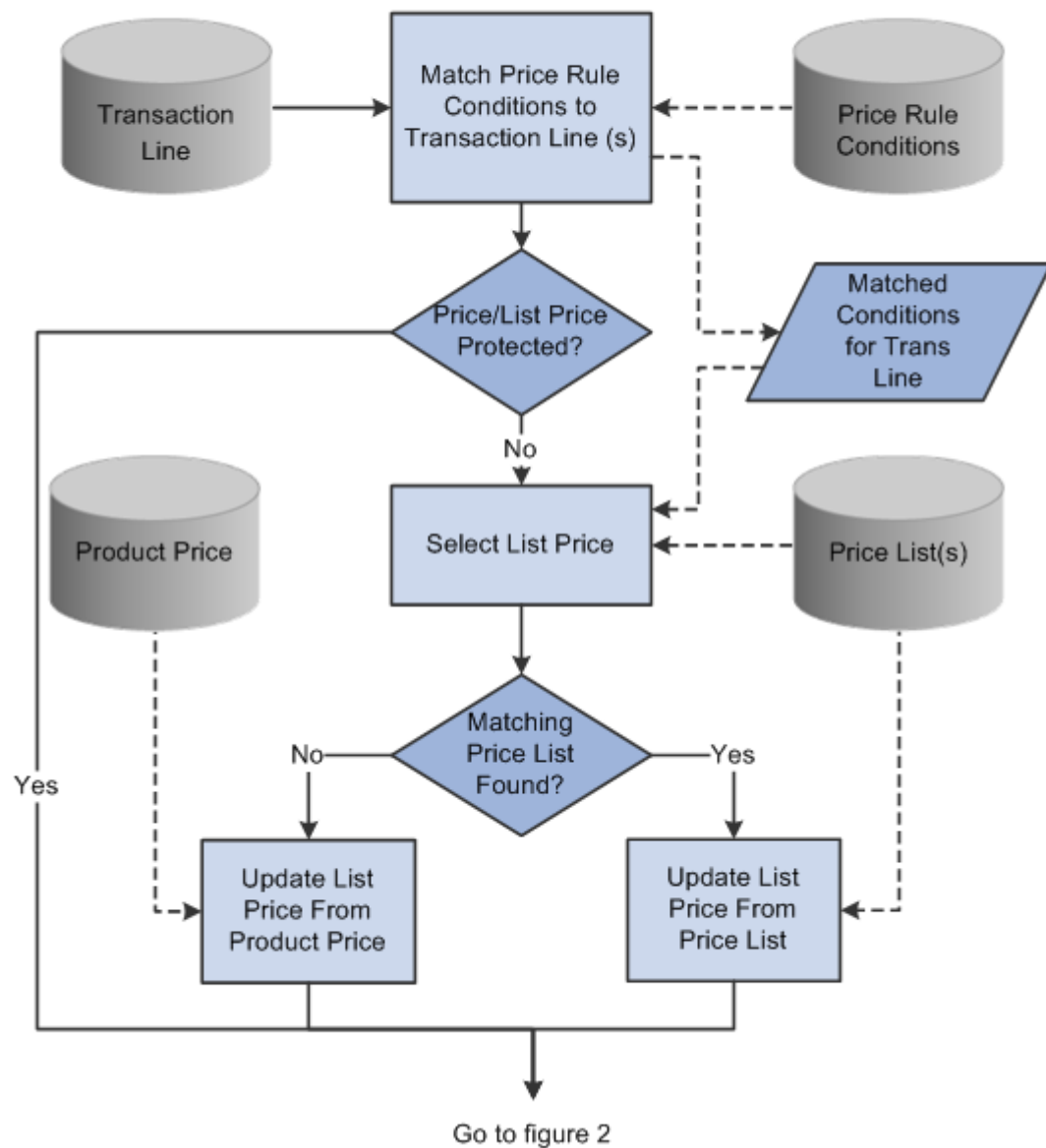
Batch pricing for the sales order or quote works the same way as the online pricing of the sales order or quote. Depending on how you set up online pricing installation options, pricing during order entry will occur in the background or when you save or click the price order button from the Order Entry page or the Shipment Schedules page.

#### ① Note

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

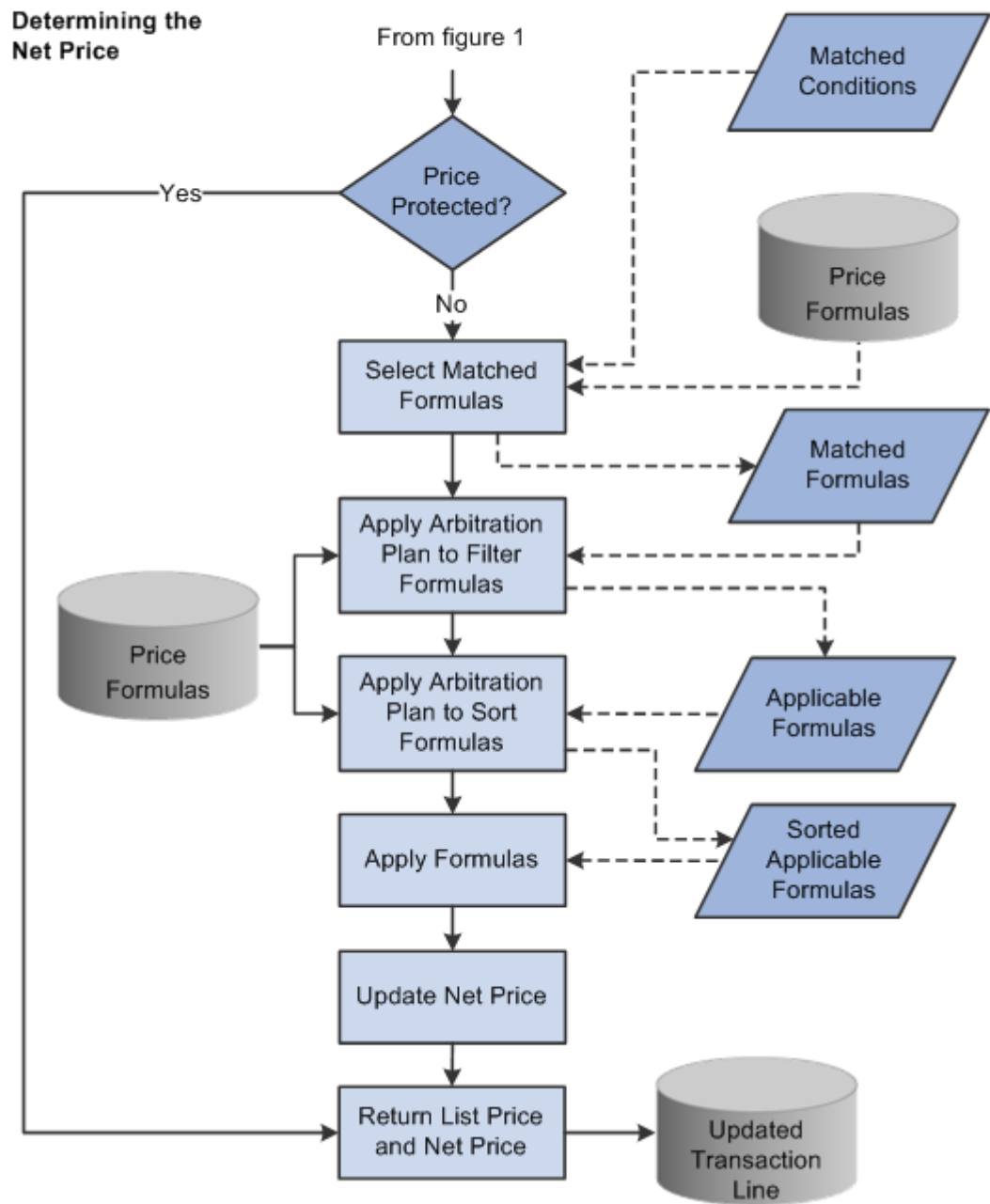
The following diagram provides an overview of the process of determining the list price and net price for each transaction line during the transaction process (1 of 2).

Figure 1

**Determining the List Price**

The following diagram provides an overview of the process of determining the list price and net price for each transaction line during the transaction process (2 of 2):

Figure 2



## Period-To-Date Pricing

This section discusses:

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

- Period-to-date pricing dates.
- Period-to-date pricing setup.

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

## Reprice or Change Orders

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

## Period-To-Date Caps

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

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

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

## Period-To-Date Adjustment Review

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

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

## Period-To-Date Pricing Dates

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

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

## Period-To-Date Pricing Setup

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

1. Define the pricing period using the Sales Calendar page.
2. Select the calendar to use on the Order Management Setup Business Unit page.
3. Select the period-to-date option on the Price Rule - Formulas page.

## Cost-Plus Pricing

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

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

Cost-plus pricing enables you to set up a price rule to indicate the pricing base based on certain conditions. If no price rule is matched to the transaction line, then the list price is used as the base price. If matching price base rules exist, then the arbitration plan of the order is used to filter and sort the matching rule to determine the base. If no match to the arbitration plan exists, then the list price (the default) is used.

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

- Use Highest Base: Compare list price and cost, and use the larger as the pricing base.
- Use Lowest Base: Compare list price and cost, and use the smaller as the pricing base.
- Use Cost as Base: Use cost as the pricing base.
- Use List Price as Base: Use list price as the pricing base.
- Use Alt Product Cost: Use an alternate product cost as the pricing base.

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

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

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

## Weight and Volume Pricing

To encourage customers to order in full truck, pallet, or container, you can monitor and offer order discounts based on the weight or volume of the order when setting up price rules. If pricing by weight or volume, you must also use the delivery management feature to group order lines into deliveries for pricing and shipment.

You can enter a separate weight and volume option (arbitration plan) on the General Information - Sold to Options page on the customer definition. The weight and volume option is used as the default weight and volume arbitration plan in the sold-to section of the Order Entry Form page during order entry. If a weight and volume arbitration plan is not entered on the Order Entry Form page, then a warning message appears, alerting the clerk that weight and volume pricing is used for the PeopleSoft Order Management business unit and to select a weight and volume option for the system to calculate the weight and volume pricing.

You can view the weight and volume pricing adjustments on the Deliveries page of the Order Entry Form in PeopleSoft Order Management. Use the Shipment Price Adjustments page to view the price rule information for weight and volume pricing.

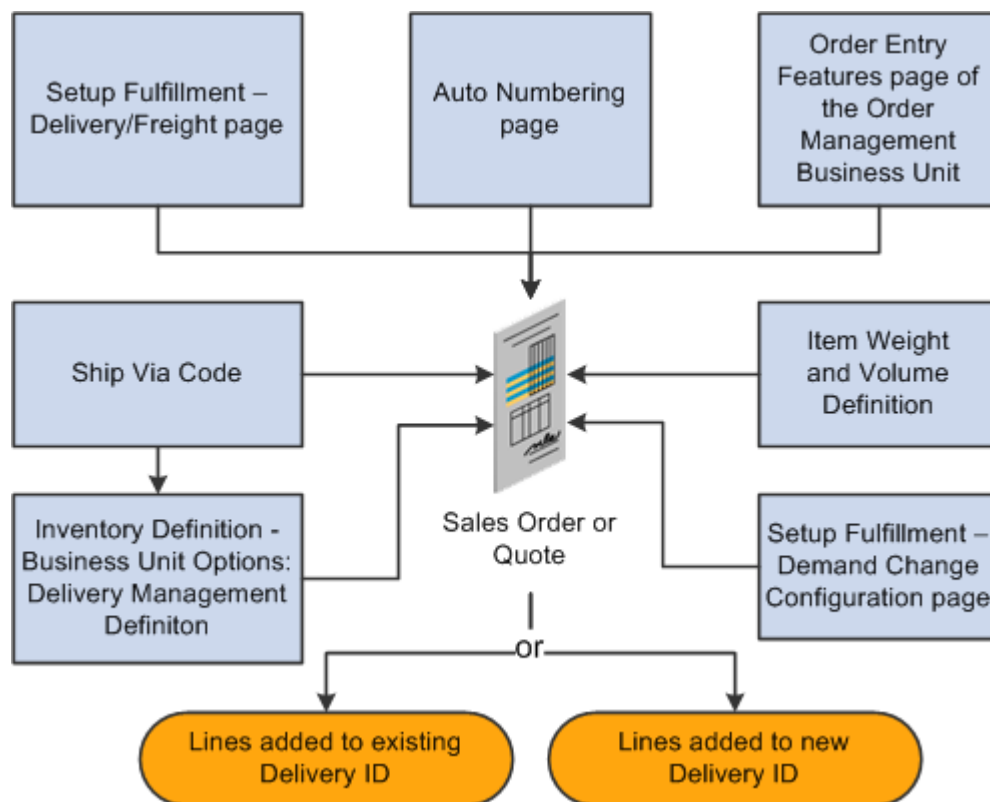
**Note**

Weight and volume pricing is calculated when the order is saved. If weight and volume pricing was calculated manually, then it is recalculated when you save.

### Setting Up Delivery Management for Weight and Volume Pricing

Delivery Management enables you to assemble demand lines together into a delivery so that the lines can be priced, freighted, or shipped as a group. Deliveries are managed automatically by the system as order schedule lines are added or modified in order entry. The system matches the attributes of the demand lines to group the lines into deliveries. The delivery definition can be configured by Inventory Business Unit. If possible, the system adds new schedule demand lines to an existing delivery ID. The system can also move modified schedule demand lines to another existing delivery ID. If a new or modified schedule demand line cannot be placed in an existing delivery ID, then the system creates a new delivery ID.

The following diagram displays the setup steps to enable the Delivery Management feature. These steps involve pages in both PeopleSoft Inventory and PeopleSoft Order Management that are used to enable the Delivery Management feature, define the delivery, determine how delivery IDs are numbered, define the dimensions of the delivery vehicle, define the dimensions of the items on a sales order, and determine when delivery IDs are created or changed.

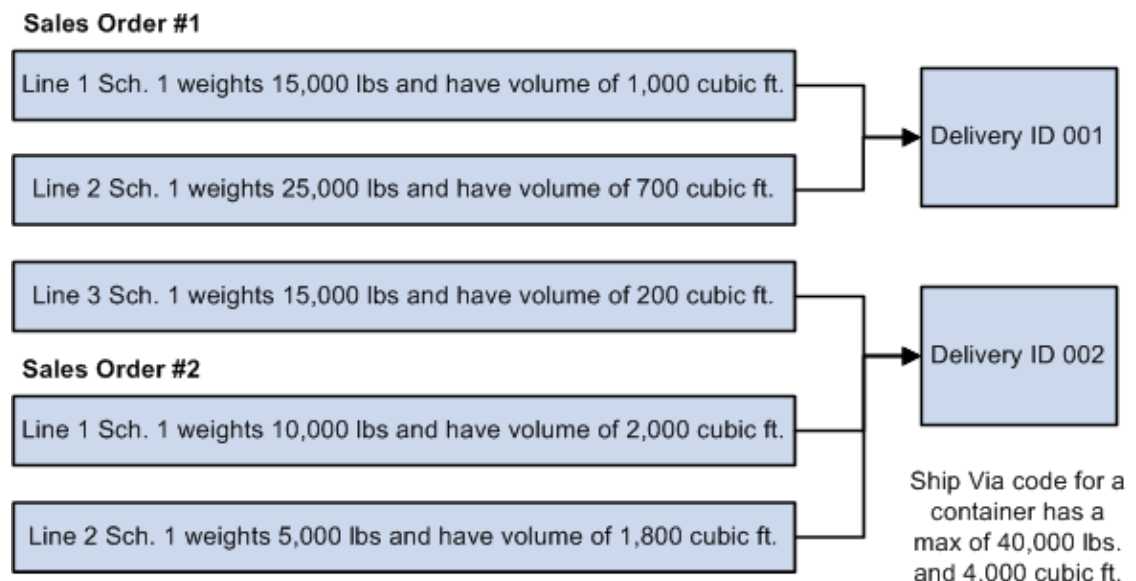


Complete these tasks to enable the Delivery Management feature:

- Use the Setup Fulfillment - Delivery/Freight page to enable delivery management for the Inventory business unit by selecting *Yes* or *Manual* for the **Delivery Option** field. This enables the delivery management feature for the Delivery Management Workbench and the Inventory fulfillment processes.
- Use the Auto Numbering page to define the structure of the delivery ID numbering sequence at the SetID level. You can add multiple sequences with different prefixes to be used in different locations. You can also set the Inventory business unit SetID indirection to use a different SetID auto-numbering for each Inventory business unit.
- Use the Order Entry Features page, within the Order Management business unit definition, to determine when a delivery ID should be applied to a sales order line or quote line. You can choose to create or update deliveries when a user saves a new or changed sales order or quote, or when the user changes a field value on a new or existing order or quote. You can also choose to create or update deliveries when the Order Completion process is run.
- Use the Deliveries Restricted to Order field to determine whether all of the demand lines assigned to a delivery must be from the same sales order. This is available for quotes and sales orders only. The Deliveries Restricted to Order field can be defined within the default hierarchy on the Shipping and Returns page of the Order Management business unit, Order Group Shipping Terms page, customer's General Information - Ship To Options page, and the Buying Agreement Form - Header Terms page. In the default hierarchy, the more specific information overrides the more general information; in this case, the setting for the Deliveries Restricted to Order field that is defined on a buying agreement overrides a value on a customer and the value on the customer overrides the value on the order group. A value on the order group overrides the value at the order management business unit.

- Use the Ship Via Code page to define the dimensions of one or more shipping methods, such as small delivery truck, large truck, or boxcar. The weight and volume constraints defined in the ship via code determine when a delivery ID has reached capacity and a new delivery ID must be created. In order entry, the system will warn the user when a capacity constraint is violated and automatically move new demand to a new delivery.
- Use the Inventory Definition - Business Unit Options Delivery Management Definition page to identify the delivery key fields used to build a delivery ID. When the system groups order schedule demand lines together to create a delivery, certain field values, such as inventory business unit and scheduled shipment date, must be the same in all of the schedule lines. Use this page to define additional fields that must match in each schedule demand line added to one delivery ID. To use the weight and volume pricing feature, you must include the Ship Via code as an additional field.
- Use the Define Business Unit Item - Inventory Weight/Volume page to define the weight and volume of individual item IDs. This information flows to the order schedule line so that the system can calculate the shipping weight and volume for the item quantity included in the line and determine when a delivery ID has reached the maximum weight or maximum volume. These weight and volume fields on the Define Item - General: Dimensions page are used when the same fields are not defined on the Define Business Unit Item - Inventory: Weight/Volume page.
- Use the Setup Fulfillment- Demand Change Configuration page to identify the fulfillment state at which no further demand lines can be automatically added to the delivery ID by the system. In the Add Lines to Deliveries row, select the fulfillment state at which the system should consider the delivery closed for shipment. If any demand line on the delivery has reached the state defined, then the system no longer automatically adds new demand lines to the delivery.

The following diagram illustrates how demand lines are grouped together into deliveries. The shipping weight and volume of the individual schedule lines is compared to the maximum weight and maximum volume of the Ship Via code used to create the delivery.



The preceding diagram also illustrates how sales order schedule demand lines are grouped into delivery IDs. The Ship Via code for a container has a maximum weight of 40,000 pounds and a maximum volume of 4,000 cubic feet. All the schedule demand lines of this sales order are shipping from the same Inventory business unit on the same scheduled shipment date

using the same carrier and the same ship via value. The weight and volume of the individual schedule line is based on the item quantity in this line multiplied by the shipping weight and shipping volume of the individual item (Define Business Unit Item - Inventory: Weight/Volume page). The first two lines are added to one delivery before it reaches the maximum weight of 40,000 pounds. The last three lines are added to a second delivery, which reaches the maximum volume of 4,000 cubic feet. If a sixth line were added to this sales order, a third delivery ID would be created since the first two delivery IDs have reached maximum capacity.

### Related Topics

- PeopleSoft Supply Chain Management Common Information: Setting Up Delivery Management
- PeopleSoft Order Management: Understanding the Sales Order Entry Form

## Additional Pricing Options

This section discusses:

- Single-tiered pricing rules.
- Multiple-tiered pricing rules.
- Discounted giveaways and Buy One, Get One free rules.
- Different product pricing and ordering units.
- Advanced pricing calculation in a price rule.

## Single-Tiered Pricing Rules

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

Consider this example: A price rule and schedule is set up for selling sinks.

Price rule: Sinks Rule 1

Price action type: Discount/surcharge

Rollup flag by: Schedule

Tiered Pricing: Yes

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

Formulas:

| Formula Range ID | Minimum and Maximum Quantities | Discount   |
|------------------|--------------------------------|------------|
| 1                | 1 to 10                        | 5 percent  |
| 2                | 11 to 20                       | 10 percent |
| 3                | 21 to 99                       | 20 percent |

The schedule line lists a quantity purchase of 25 sinks. A 5 percent discount will be applied to the first 10 sinks, a 10 percent discount will be applied to the next 10 sinks, and a 20 percent discount will be applied to the remaining sinks. Three pricing schedules are generated for the same order schedule.

## Multiple-Tiered Pricing Rules

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

For example, using the price rule created in the previous section, now add an additional price rule:

Price rule: Sinks Rule 2

Price action type: Discount/surcharge

Rollup flag by: Schedule

Tiered Pricing: Yes

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

Formulas:

| Formula Range ID | Minimum and Maximum Quantities | Discount  |
|------------------|--------------------------------|-----------|
| 1                | 1 to 15                        | 1 percent |
| 2                | 16 to 30                       | 2 percent |

Based on this tiered rule, a 1 percent discount will be applied to the first 15 sinks, and a 2 percent discount will be applied to the remaining sinks. The quantities and the related adjustments from both price rules are calculated first and then merged by net price.

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

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

This table lists the quantities and related adjustments for price rule Sinks Rule 2.

| Quantity Group | Quantity | Discount  | Formula |
|----------------|----------|-----------|---------|
| E              | 10       | 1 percent | 1       |
| F              | 5        | 1 percent | 1       |
| G              | 5        | 2 percent | 2       |
| H              | 5        | 2 percent | 2       |

Comparing the results from both price rules, Sinks Rule 1 will apply a 5 percent discount to the first 10 sinks, and Sinks Rule 2 will apply a 1 percent discount to the first 10 sinks, which sums to total of 6 percent and results in the same net price. Similarly for the next 5 sinks, Sinks Rule 1 applies a 10 percent discount and Sinks Rule 2 applies a 1 percent discount, for a total of 11

percent discount and the same net price. Grouping the quantity by same net price results in the final pricing schedules shown in this table:

| Pricing Schedule | Quantity | Discount    | Formulas                                                                          | Quantity Group |
|------------------|----------|-------------|-----------------------------------------------------------------------------------|----------------|
| 1                | 10       | –6 percent  | –5 percent Sinks Rule 1, Formula ID 1, and –1 percent Sinks Rule 2, Formula ID 1  | A and E        |
| 2                | 5        | –11 percent | –10 percent Sinks Rule 1, Formula ID 2, and –1 percent Sinks Rule 2, Formula ID 1 | B and F        |
| 3                | 5        | –12 percent | –10 percent Sinks Rule 1, Formula ID 2 and –2 percent Sinks Rule 2, Formula ID 2  | C and G        |
| 4                | 5        | –22 percent | –20 percent Sinks Rule 1, Formula ID 3, and –2 percent Sinks Rule 2, Formula ID 2 | D and H        |

## Discounted Giveaways and Buy One, Get One Free Rules

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

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

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

### Related Topics

- [Understanding Price Rules](#)  
This section discusses:

## Different Product Pricing and Ordering Units

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

## Advanced Pricing Calculation in a Price Rule

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

Enterprise Pricer enables you to:

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

### Using Indexes in Pricing Calculations

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

#### Note

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

The `RT_RATE_TBL` table is used to maintain the price indexing data:

| Field Name    | Description           | Used by Enterprise Pricer                                                                      |
|---------------|-----------------------|------------------------------------------------------------------------------------------------|
| RT_RATE_INDEX | Market Rate Index     | Identify the index. Its category must be Economic Indicator, as defined in table RT_INDEX_TBL. |
| TERM          | Term                  | NA                                                                                             |
| FROM_CUR      | From Currency Code    | Both currency codes FROM and TO must be the same. They match the currency of the transaction.  |
| TO_CUR        | To Currency Code      | Both currency codes FROM and TO must be the same. They match the currency of the transaction.  |
| RT_TYPE       | Rate Type             | NA                                                                                             |
| EFFDT         | Effective Date        | Used to select the effective index value.                                                      |
| RATE_MULT     | Rate Multiplier       | Index value.                                                                                   |
| RATE_DIV      | Rate Divisor          | NA                                                                                             |
| SYCID         | Synchronization ID    | NA                                                                                             |
| LASTUPDDTTM   | Last Update Date/Time | NA                                                                                             |

As an example, suppose these market rates exist:

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

Then, a rate renewal occurs:

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

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

| Formula ID | Adjustment Flag                | Numeric Value | Text Value (Math Expression)                                                           | Market Rate Index | Select Small/Larger |
|------------|--------------------------------|---------------|----------------------------------------------------------------------------------------|-------------------|---------------------|
| 1          | Percentage and Math Expression | 5             | IndexStartAmount * (1 + (IndexEndValue – IndexStartValue) / IndexStartValue + 2 / 100) | CPI               | Smaller             |
| 2          | Percentage and Math Expression | 1.5           | IndexStartAmount * (1 + (IndexEndValue – IndexStartValue) / IndexStartValue + 1 / 100) | GOV               | Smaller             |
| 3          | Percentage and Math Expression | 2             | IndexStartAmount * (IndexEndValue / IndexStartValue)                                   | GOV               | Larger              |

The starting values are:

- IndexStartAmount = 10000.
- StartDate = February 1, 2000.
- EndDate = January 31, 2001.

The first formula is processed in this manner:

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

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

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

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

The second formula is processed in this manner:

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

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

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

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

Processing of the third formula uses index values to perform different types of calculations:

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

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

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

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

**Related Topics**

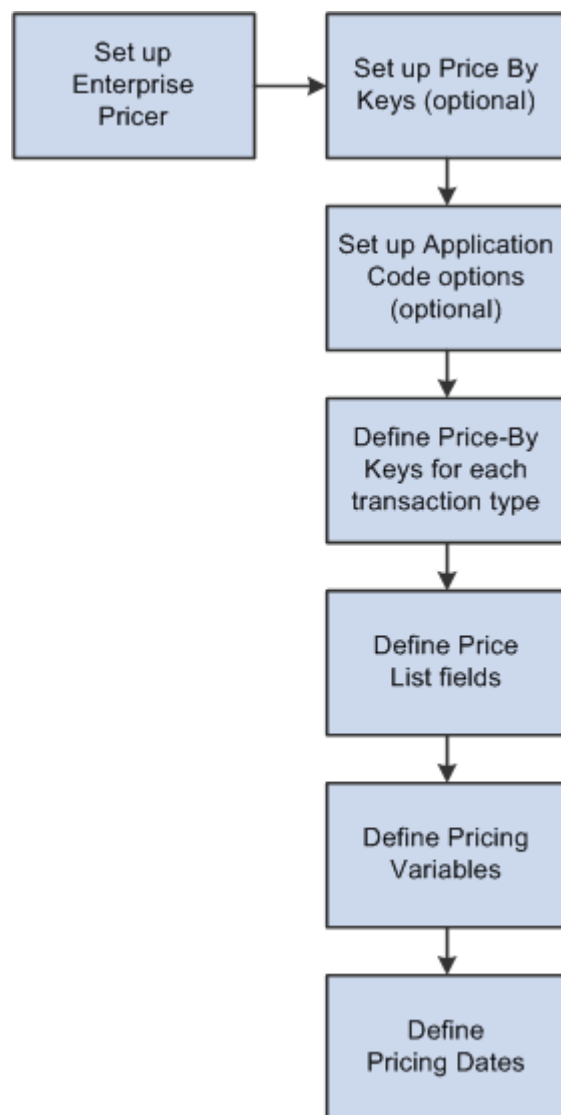
- [Understanding Price Rules](#)  
This section discusses:

# 3

## Implementing Enterprise Pricer

### Understanding Enterprise Pricer Implementation

The following diagram provides an overview of the pricing setup tasks that includes the Enterprise Pricer setup process and defining the price-by keys, price list fields, pricing variables and the pricing dates.



The setup for Enterprise Pricer is separated into two parts: performing setup tasks and establishing pricing options. Setup tasks involve configuring the pricing features available in your pricing implementation. It may also be used by developers and others who intend to

customize the Enterprise Pricer module by adding price-by fields to the list of delivered fields or by adding transactions to be priced. Pricing options are tasks performed to initially configure your system to establish pricing variables, fields you will use to perform your pricing, dates to be used in mathematical equations, and fields to use as Price List business objects.

#### Note

The general Enterprise Pricer user should not have access to the setup pages. These pages are available to the Enterprise Pricer developer to modify the Enterprise Pricer system data and to modify the pricing features available to the users. You can configure the Enterprise Pricer data entry pages and restrict which price-by fields are available to the general Enterprise Pricer user, but this is not required for a standard implementation of Enterprise Pricer. The system data described in these topics are delivered for each pricing transaction implementation.

### Setup Tasks

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

The implementation options are:

1. Set up Price-by Keys: The All Price-by Key Fieldnames page contains the standard list of available fields that are used when defining price rule conditions at the line level.

All delivered price-by keys are available at implementation. Here you can add fields that are considered for price list determination and price rule creation.

2. Set up Transaction Code Options: The options for each transaction are delivered as system data and appear on the online pricing pages.

They also determine how Enterprise Pricer prices each transaction. Changes to these pages are considered a customization and are not supported by PeopleSoft.

#### Warning

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

### Pricing Options

The basic setup options task are:

1. Set up system pricing keys on the All Price-by Fieldnames page.  
This defines the list of record fields that are used by the system.
2. Set up the application on the Price Transaction Code page.

This sets up the options for the application by defining the acceptable transaction codes.

3. Set up the price-by keys for the application using the Transaction Price-By Keys page.

This identifies the price-by keys used by the application when defining price lists and price rules.

#### Note

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

4. Set up the pricing dates for the application on the Pricing Variables page.

This defines the pricing date variables used in the creation of price rules and arbitration plans. The dates are used to create breaks on the formula and select price lists.

5. Set up the pricing variables for the application on the Pricing Dates page.

This defines the pricing variables used for price formulas when creating price rules. The Pricing Variables page is used to establish the variables to use for calculating the net price using mathematical expressions.

## (Optional) Setting Up Enterprise Pricer

This section discusses how to set up Enterprise Pricer.

#### Note

If you are not modifying standard setup data in PeopleSoft Enterprise Pricer, you do not need to complete the tasks discussed in this section. You can continue to the next implementation step. Adding or deleting price-by fields to the standard setup data is considered a customization and is not supported.

## Pages Used to Set Up Enterprise Pricer

| Page Name                                    | Definition Name | Usage                                                                                                                                           |
|----------------------------------------------|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">All Price-by Key Fields Page</a> | EOEP_KEYFLDS    | Set up price-by key fields for all Enterprise Pricer implementations. These values are delivered as system data during installation.            |
| <a href="#">Price Transaction Code Page</a>  | EOEP_APP_CODE   | Set up transaction code options, which set up the data entry pages for each transaction code and relate the transaction to another transaction. |

## Understanding Transaction Code Options

The options for each transaction are delivered as system data and appear in the online pricing pages. They also determine how PeopleSoft Enterprise Pricer is used to price each transaction. You can customize your pricing definition by selecting the appropriate pricing actions for your organization. This table lists the setup options available for each transaction:

| Transaction              | Contract                                                                                                                                                                                                                                | Sales Order, Buying Agreement, Batch                                                                                                                                                                                                                                                                                                                                                                                                    | Weight and Volume                                                        |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|
| Valid Action Types       | <ul style="list-style-type: none"> <li>Discount/Surcharge</li> <li>Price Override</li> <li>Minimum/Maximum Target Discount</li> <li>Min/Max Target Price</li> <li>Min/Max Target Surcharge</li> <li>Related Business Objects</li> </ul> | <ul style="list-style-type: none"> <li>Discount/Surcharge</li> <li>Pricing Base</li> <li>Rollup Only Rule</li> <li>Minimum/Maximum Margin</li> <li>Price Override</li> <li>Product Add</li> <li>Total Order Discount/Surcharge</li> <li>Minimum/Maximum Target Discount</li> <li>Minimum/Maximum Target Price</li> <li>Minimum/Maximum Target Surcharge</li> <li>Price List Only Condition</li> <li>Related Business Objects</li> </ul> | Discount/Surcharge                                                       |
| Valid Adjustment Methods | <ul style="list-style-type: none"> <li>Cascading</li> <li>Summed</li> </ul>                                                                                                                                                             | <ul style="list-style-type: none"> <li>Cascading</li> <li>Summed</li> </ul>                                                                                                                                                                                                                                                                                                                                                             | Summed                                                                   |
| Valid Price Types        | <ul style="list-style-type: none"> <li>Extended Price</li> <li>Quantity</li> </ul>                                                                                                                                                      | <ul style="list-style-type: none"> <li>Extended Price</li> <li>Quantity</li> </ul>                                                                                                                                                                                                                                                                                                                                                      | <ul style="list-style-type: none"> <li>Volume</li> <li>Weight</li> </ul> |

| Transaction              | Contract        | Sales Order, Buying Agreement, Batch                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Weight and Volume                                                                                                                                                                                         |
|--------------------------|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Transaction Code Options | Use Price Index | <ul style="list-style-type: none"> <li>• Use Alter Cost Based Pricing</li> <li>• Use Buying Agreement</li> <li>• Use Cost Based Pricing</li> <li>• Use Exclusive Pricing</li> <li>• Use External Application Class</li> <li>• Use KVI/NDP (known value items/non-discountable products) Products</li> <li>• Use mathematical Expression</li> <li>• Use Maximum Quantity</li> <li>• Use Mutually Exclusive Rule</li> <li>• Use One-Time Only Price Rule</li> <li>• Use Payment Terms on Formula</li> <li>• Use Period-to-Date</li> <li>• Use Quantity in Price List</li> <li>• Use Rule Distribution Accounts</li> <li>• Used Tiered Pricing</li> <li>• Use Trade Promotions</li> </ul> | <ul style="list-style-type: none"> <li>• Use Rule Distribution Accounts</li> <li>• Use Payment Terms on Formula</li> <li>• Use One-Time Only Price Rule</li> <li>• Use Mutually Exclusive Rule</li> </ul> |

### Differences in Pricing Methods Between PeopleSoft CRM and PeopleSoft SCM

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

- PeopleSoft CRM uses the recurring and frequency flags when defining the price list.  
CRM use product notes on the price list. These options are not available in PeopleSoft SCM.
- In PeopleSoft CRM, the order capture transaction code appears by default.  
In PeopleSoft SCM, you can choose the transaction code when you are setting up a price rule, price list, or arbitration plan.
- Discounts in PeopleSoft CRM are only off-invoice.  
PeopleSoft SCM uses off-invoice and bill-back adjustments.

- PeopleSoft CRM does not use payment terms and distribution accounting when pricing transactions.
- PeopleSoft CRM uses the Lookup in Priority Order option and PeopleSoft SCM uses the Consider All Prices Price List Lookup option.

## All Price-by Key Fields Page

Use the All Price-by Key Fields page (EOEP\_KEYFLDS) to set up price-by key fields for all Enterprise Pricer implementations.

These values are delivered as system data during installation.

Navigation:

**Set Up Financials/Supply Chain**, and then **Common Definitions**, and then **Pricing Registration**, and then **All Price-by Key Fieldnames**

**Note**

Adding data here is considered a customization.

| Field or Control  | Description                                                                                                                                                        |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Record</b>     | Select the transaction record name for the price-by key field.<br>When adding a new record, click the <b>Look up Record</b> button to add new values.              |
| <b>Field Name</b> | Select the transaction field name for the price-by key field.<br>If a new Record is added, click the <b>Look up Field Name</b> button to add corresponding fields. |

## Price Transaction Code Page

Use the Price Transaction Code page (EOEP\_APP\_CODE) to set up transaction code options, which set up the data entry pages for each transaction code and relate the transaction to another transaction.

Navigation:

**Set Up Financials/Supply Chain**, and then **Common Definitions**, and then **Pricing Registration**, and then **Price Transaction Code**

This example illustrates the fields and controls on the Price Transaction Code page (1 of 2). You can find definitions for the fields and controls later on this page.

## Price Transaction Code

| Transactions to be Priced |              |                      |
|---------------------------|--------------|----------------------|
| Transaction               | *Description | Parent               |
| SO                        | Sales Order  | <input type="text"/> |

Price Rule Usage Processor

| Valid Action Types             |                      |                                  | Personalize                      | Find | View All |  |  | First | 1-10 of 12 | Last |
|--------------------------------|----------------------|----------------------------------|----------------------------------|------|----------|--|--|-------|------------|------|
| Action Type                    |                      |                                  |                                  |      |          |  |  |       |            |      |
| Discount/Surcharge             | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Pricing Base                   | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Rollup Only Rule               | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Min/Max Margin                 | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Price Override                 | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Product Add                    | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Total Order Discount/Surcharge | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Min/Max Target Price           | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Min/Max Target Discount        | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Min/Max Target Surcharge       | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |

This example illustrates the fields and controls on the Price Transaction Code page (2 of 2). You can find definitions for the fields and controls later on this page.

| Valid Adjustment Methods |                      |                                  | Personalize                      | Find | View All |  |  | First | 1-2 of 2 | Last |
|--------------------------|----------------------|----------------------------------|----------------------------------|------|----------|--|--|-------|----------|------|
| Adjustment Method        |                      |                                  |                                  |      |          |  |  |       |          |      |
| Cascading                | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |          |      |
| Summed                   | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |          |      |

| Valid Price Types |                      |                                  | Personalize                      | Find | View All |  |  | First | 1-2 of 2 | Last |
|-------------------|----------------------|----------------------------------|----------------------------------|------|----------|--|--|-------|----------|------|
| Price Type        |                      |                                  |                                  |      |          |  |  |       |          |      |
| Extended Price    | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |          |      |
| Quantity          | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |          |      |

| Transaction Code Options       |                      |                                  | Personalize                      | Find | View All |  |  | First | 1-10 of 17 | Last |
|--------------------------------|----------------------|----------------------------------|----------------------------------|------|----------|--|--|-------|------------|------|
| Options                        |                      |                                  |                                  |      |          |  |  |       |            |      |
| Use Rule Distribution Accounts | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Use Payment Terms on Formula   | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Use Period-to-date             | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Use Trade Promotion            | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Use Exclusive Pricing          | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Use One-Time Only Price Rule   | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Use Cost Based Pricing         | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Use Tiered Pricing             | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Use Mutually Exclusive Rule    | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |
| Use Maximum Quantity           | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |      |          |  |  |       |            |      |

| Field or Control   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Transaction</b> | <p>Available transaction codes are:</p> <ul style="list-style-type: none"> <li>• <b>BA</b> — Buying Agreements. In Order Management, the Buying Agreement can leverage the power of Enterprise Pricer by referencing a Price Rule as the basis for Pricing for the duration of the Buying Agreement.</li> <li>• <b>CA</b> — Contract Billing: Order Management integrates with the Contracts module to provide advanced pricing capabilities for revenue and billing by product. The <i>CA</i> transaction code is used to identify product prices for billing.</li> <li>• <b>LP</b> — Weight and Volume Pricing calculated online: When calculating freight and associated charges during transaction entry, Enterprise Pricer Price Rules can be leveraged for calculating freight charges based on various fields on the business objects and documents where freight needs to be charged.</li> <li>• <b>LPBT</b> — Weight and Volume Pricing calculated in a batch process: When calculating freight and associated charges during batch processing (i.e. Order Completion), Enterprise Pricer Price Rules can be leveraged for calculating freight charges based on various fields on the business objects and documents where freight needs to be charged. It is suggested the same transaction pricing options for Online be used for batch processing.</li> <li>• <b>OMPB</b> — Order Management Customer Price Book: The Price Book options should match those of the Sales Order so that when you generate a Price Book for a customer, the same sort of options are displayed/printed for the Customer-specific Pricing options.</li> <li>• <b>RMA</b> — Returned Material Authorization Pricing: This setup allows you to determine how orders returned for replacement and credit are to be calculated using Price Rules and Formulas. You may have a different set of criteria for pricing returned material than you would for Sales Orders/Quotes.</li> <li>• <b>RP</b> — Contract Revenue Pricing: Product prices setup using the <i>RP</i> transaction code are used in the Contracts module for revenue recognition.</li> <li>• <b>SO</b>: Sales Order and Quotes: This setup allows you to determine how orders and Quotes will leverage Enterprise Pricer options and how Orders and Quotes will be priced when doing online data entry.</li> <li>• <b>SOBT</b>: Sales Order and Quote Batch Processing: This setup allows you to</li> </ul> |

| Field or Control                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                   | determine how Orders and Quotes will leverage Enterprise Pricer options and how Orders and Quotes will be priced when doing processing batch (i.e.: Order Completion, Reprice Orders). It is suggested the same transaction pricing options for online be used for batch processing.                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Parent</b>                     | <p>If you want to use the options from another transaction, select that transaction as the parent. For example, Buying Agreement uses the same options as Sales Order. Therefore, you would select Sales Order as the parent of Buying Agreement, and no options would be set up under Buying Agreement.</p> <p><b>Note:</b> Returned material authorization (RMA), buying agreement, and batch pricing are delivered with the sales order transaction that is defined as the parent.</p>                                                                                                                                                                                                                                |
| <b>Pricing Data Used</b>          | <p>Select a value that indicates if the price rule should be inherited by child transactions. Values are:</p> <p><i>System Default:</i> Child application uses pricing data of parent application. This is the default option.</p> <p><i>Parent Application:</i> A child application uses the pricing data of the parent application; however, a child application is allowed to flag price rules set up for the parent application so that they cannot be used in the child application.</p> <p><b>Note:</b> An RMA will be set up as a child application of a sales order. Set the <b>Pricing Data Used</b> flag to <i>Parent Application</i> so that it will selectively use price rules set up for sales orders.</p> |
| <b>Price Rule Usage Processor</b> | <p>Enter the name of the application class that returns and displays price rule usage for the transaction. The application class implements interface EOEP_API:RuleUsageChecker to return the price rule usage data during the pricing calculation and to display the price rule data on the Price Rule page. For example, SCM_OM_PRICER:EOEP_API:SORuleUsageChecker is used for sales order.</p> <p>This value is required if the transaction uses these types of price rules: one-time only, maximum quantity, period-to-date.</p>                                                                                                                                                                                     |

| Field or Control          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Valid Action Types</b> | <p>Select valid price action types for the transaction and limit the available options during price rule and arbitration plan entry. The values that you select are available for the price rule price action type. Values are:</p> <p><i>Discount/Surcharge:</i> Applies a discount or surcharge to the line.</p> <p><i>Min/Max Margin:</i> When the price rule has a match, the order is put on hold, as in the case of PeopleSoft Order Management. A schedule is on hold if it hits any Min/Max Margin price rules. The hold is removed automatically when repricing occurs if the order schedule no longer matches any of the Min/Max Margin price rules.</p> <p><i>Min/Max Target Discount:</i> Compares the total discount adjustment and, if it is outside the specified amount, applies a target discount.</p> <p><i>Min/Max Target Price:</i> Compares the price adjustment and, if it is outside the specified range, applies a target price.</p> <p><i>Min/Max Target Surcharge:</i> Compares the total surcharge adjustment and, if it is outside the specified range, applies a target surcharge.</p> <p><i>Price List Only Condition:</i> Attaches price lists to a transaction. The formula does not specify price breaks.</p> <p><b>Note:</b> You can use the price list-related objects if you do not require a complex price rule condition.</p> <p><i>Price Override:</i> Applies a new price.</p> <p><i>Pricing Base:</i> Selects the base or the starting point for pricing calculation. The pricing base action type does not have associated formulas, but it has a flag that indicates the base used if the transaction line matches this price rule.</p> <p><i>Product Add:</i> In previous releases, this was a giveaway action type. Now, you can indicate the discount, surcharge, or price in addition to the quantity of the giveaway. The list price of the giveaway product is used to calculate the net price. For online sales orders in PeopleSoft Order Management, the product adds (or giveaways) appear on a separate page or grid so that you can choose the ones to add to the order. For batch orders, the product adds are added to the order automatically.</p> <p><i>Rollup Only Rule:</i> Rolls up the quantity or amount. Only conditions are used for this type of rule (no breaks are needed). This type of price rule is used by other price rules, such as Discount/Surcharge price rules, to select price formulas.</p> <p><i>Total Order Discount/Surcharge:</i> Applies a discount or surcharge to the entire order.</p> |

| Field or Control                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Valid Adjustment Methods</b> | <p>Select how the system applies the adjustment for the <i>Discount/Surcharge</i> price action type from these values:</p> <p><i>Cascading</i>: Applied as they are found. A second discount is applied to the previously discounted price, a third discount is applied to a price that already was discounted twice, and so on. For example, if the system encounters two discounts, 10 percent and 20 percent off the list price of 100.00 USD, then the system applies the discounts in this manner: 10 percent off of 100.00 USD and 20 percent off of 90.00 USD. Thus, the unit price for the order schedule line is 72.00 USD.</p> <p><i>Summed</i>: When the system finds multiple discounts, it adds them together and applies the discounts once. Thus, for the summed example, the system would apply discounts in this manner: the 10 percent and 20 percent discounts for 30 percent off of 100.00 USD, which results in a unit price for the order schedule line of 70.00 USD.</p> <p><b>Note:</b> Summed adjustments are applied after all Cascading adjustments are applied.</p> |
| <b>Valid Price Types</b>        | <p>Select the price types whose values you want to price by. Choose from: <i>Extended Price</i>, <i>Quantity</i>, <i>Weight</i>, and <i>Volume</i>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

| Field or Control                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Transaction Code Options</b> | <p>Select the features that the transaction supports. These options will control the pricing data setup pages and the pricing process. Possible values are:</p> <p><i>No Price List Auto Conversion:</i> Select this option to disallow price list in base currency from being used if no price list in transaction currency is found. If this option is not selected, price list in base currency will be converted to transaction currency and used if no matching price list in transaction currency is found.</p> <p><i>Use Alt Cost Based Pricing</i> (use alternate cost based pricing): Select to indicate whether or not the specified transaction uses the Alter Cost Based Pricing feature. Enabling this option results in the <b>Applicable to Alternate Cost Base</b> option appearing on the Conditions page when you define a price rule.</p> <p><i>Alternate cost</i> and <i>product cost</i> are different. For example, in Order Management, the alternate cost is product cost with an alternate cost adjustment factor applied.</p> <p><i>Use Buying Agreement:</i> Select to indicate whether or not the specified transaction uses the Buying Agreement feature. When this option is selected, the transaction can set up price rules that are applied to the buying agreement price, and the <b>Applicable to Buying Agreement</b> option appears on the Conditions page when you define a price rule.</p> <p><i>Use Cost Based Pricing:</i> Select to indicate whether or not the specified transaction uses the Cost Based Pricing feature. Enabling this option results in the <b>Applicable to Cost Base</b> option appearing on the Conditions page when you define a price rule.</p> <p><i>Use Exclusive Pricing:</i> Select to indicate whether or not the specified transaction uses the Mutually Exclusive pricing feature. With multiple exclusive price rules, if one or more of these rules is matched, then only one of them is applied and all other rules, whether they are mutually exclusive or regular rules, are ignored.</p> <p><i>Use External Application Class:</i> Select to indicate whether or not the specified transaction enables user-defined application classes to calculate the net price.</p> <p><i>Use KVI/NDP Products:</i> (use known value items/nondiscountable products): Select to indicate whether or not the specified transaction supports KVI/NDP products. For KVI products, Enterprise Pricer does not apply any adjustment to the price of the product. For NDP products, Enterprise Pricer does not apply discounts to the product price that would result in a net price that is less than the starting price</p> |

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                  | <p>(for example, list price or cost plus the first surcharge). In addition, you can select to exclude them from the price rule rollout for price formula matching.</p> <p><i>Use mathematical Expression:</i> Select to indicate whether or not the specified transaction enables Enterprise Pricer to create adjustments using user-defined mathematical expressions on the Price Formula page. You must set up pricing variables so that the system knows what variables are used in the pricing calculation.</p> <p><i>Use Maximum Quantity:</i> Select to indicate whether or not the specified transaction supports the ability to define price rules that are used until the applied quantity specified is reached.</p> <p><i>Use Mutually Exclusive Rule:</i> Select to indicate whether or not the specified transaction supports the ability to define price rules that are mutually exclusive. With multiple exclusive prices rules, if one or more of these rules is matched, only one of them is applied and all other rules, whether they are mutually exclusive or regular rules, are ignored.</p> <p><i>Use One-Time Only Price Rule:</i> Select to indicate whether or not the specified transaction supports the ability to define limited use price rules. On the Price Formula page, you can indicate that the rule is valid only for one time per rule or one time per customer. This option is valid only for Discount/Surcharge, Price Override, Giveaway/Product Adds, and Total Order Discount/Surcharge price rules.</p> <p><i>Use Payment Terms on Formula:</i> Select to indicate whether or not the specified transaction supports the ability to define price rules that select the payment for each adjustment that has the longest day or month increment from the list of values on the Payment Terms page in PeopleSoft Billing. If the order or schedule has more than one price rule with a payment term that qualifies for the order, then the system selects the most favorable terms for the customer.</p> <p><i>Use Period-to-date:</i> Select to indicate whether or not the specified transaction uses the Period-to-date Pricing feature. Enabling this option will result in the system using period-to-date pricing to calculate price adjustments based on transactions across a predefined time frame, rather than individual transactions.</p> <p><i>Use Price Index:</i> Select to indicate whether or not the specified transaction uses an index, such as the Consumer Price Index (CPI), from an external source for price calculations. The</p> |

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                  | <p>price index feature uses the pricing variables and mathematical expression.</p> <p><i>Use Quantity in Price List:</i> Select to indicate whether or not the specified transaction is allowed to use quantity breaks within the price list.</p> <p><i>Use Rule Distribution Accounts:</i> Select to indicate whether or not the specified transaction is allowed to view and create accounting distribution details for the adjustments in the price rule.</p> <p><i>Use Tiered Pricing:</i> Select to indicate whether or not the specified transaction supports the tiered pricing feature. With tiered pricing price rules, you can set up price rules that apply different adjustments to different ranges in the same transaction line.</p> <p><b>Note:</b> This option is supported only for price types of Quantity and Price.</p> <p><i>Use Trade Promotions:</i> Select to indicate that the transaction supports the Trade Promotion feature.</p> |

## Establishing Pricing Options

This section discusses how to establish pricing options.

### Pages Used to Establish Pricing Options

| Page Name                               | Definition Name   | Usage                                                                                                                                    |
|-----------------------------------------|-------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Price-by Key Field Page</a> | EOEP_APPKEY_FIELD | Select the price-by fields that are used to price the transaction.                                                                       |
| <a href="#">Price List Fields Page</a>  | EOEP_APPLIST_FLDS | Select valid price-list-related business objects that are used when creating price lists and when defining the price list lookup method. |
| <a href="#">Pricing Dates Page</a>      | EOEP_DATE_VAR     | Set up dates used for pricing process.                                                                                                   |
| <a href="#">Pricing Variables Page</a>  | EOEP_PRICE_VAR    | Set up variables that are used in price rule formulas when defining mathematical expressions.                                            |

## Understanding Pricing Options

Enterprise Pricer pricing options are defined by pricing managers and other users who control and manage the pricing setup for the organization. Pricing options will be created and updated at implementation and possibly occasionally as the pricing requirements change. The things defined here are used to support those who will define the arbitration plans and price rules for

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

### Pricing Variables

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

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

This table describes the pricing variables that are supported for both Contracts and Order Management:

| Contract                                                                                                                       | Sales Order                                                                                                                                                                                                                                                                                                                                                                          | Weight and Volume Pricing                                                                  |
|--------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Index End Value</li> <li>• Index Start Amount</li> <li>• Index Start Value</li> </ul> | <ul style="list-style-type: none"> <li>• Alternate Product Cost</li> <li>• Base Price</li> <li>• List Price</li> <li>• Current Net Price</li> <li>• Order Extended Base Price</li> <li>• Order Extended Product Cost</li> <li>• Order Extended List Price</li> <li>• Order Extended Net Price</li> <li>• Product Cost</li> <li>• Rollup Amount</li> <li>• Rollup Quantity</li> </ul> | <ul style="list-style-type: none"> <li>• Rollup Volume</li> <li>• Rollup Weight</li> </ul> |

### Mathematical Expressions

This table lists the only operators and functions that are supported by Enterprise Pricer for use in creating customized mathematical expressions:

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

In this example, variables are set up for list price (LIST\_PRICE), product cost (PROD\_COST), rollup quantity (ROLLUP\_QTY, sum of the quantity of the schedules that match the price rule), and current net price (NET\_PRICE). This table lists and describes examples of valid mathematical expressions:

| Mathematical Expression                                                       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1000                                                                          | Replace price with 1000.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| LIST_PRICE * 0.95                                                             | Apply a five percent discount to the list price. This expression is also valid but not as efficient: LIST_PRICE * (100 - 5) / 100.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| NET_PRICE - 10                                                                | Reduce the current net price (amount) by 10.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| TRUNCATE(ROLLUP_QTY / 3, 0)                                                   | For a product add, calculate the quantity as buy 3 and get 1.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| ROUND(PROD_COST * 1.30 * (1 - TRUNCATE(ROLLUP_QTY - 900) / 100, 0) * 0.05, 2) | <p>This formula defines a break between 1000 and 1500 units. The net price is calculated as:</p> <ul style="list-style-type: none"> <li>• Add 30 percent markup to the product cost and use that result as the base for the discount.</li> <li>• Give a 5 percent discount if the quantity is 1000 through 1099 and a 10 percent discount if the quantity is 1100 through 1199.</li> <li>• Round the result to 2 decimal points.</li> </ul> <p>This kind of expression can reduce the need to create multiple formulas. However, you should set the formula break so that the calculation is valid. For example, if this example is applied to quantities greater than 2900, then the result can become negative.</p> <p><b>Note:</b> Enterprise Pricer does not allow a negative net price. If the calculation results in a negative, it is set to 0.</p> |

### Pricing Dates

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

| Contract       | Sales Order, Weight, and Volume Pricing                                                                                                                                                               |
|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Effective Date | <ul style="list-style-type: none"> <li>• Requested Arrival Date</li> <li>• Effective Date</li> <li>• Order Date</li> <li>• Price Date</li> <li>• Schedule Ship Date</li> <li>• System Date</li> </ul> |

#### Note

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

## Common Elements Used in This Topic

| Field or Control                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Transaction to be Priced</b> | <p>Determines the appropriate list of price-by keys to use to price transactions. Values are:</p> <p><i>BA</i> (buying agreement): Used to price buying agreement transactions in PeopleSoft Order Management.</p> <p><i>CA</i> (contract): Used to price contract transactions in PeopleSoft Contracts.</p> <p><i>OC</i> (order capture): Used to price transactions in PeopleSoft Order Capture.</p> <p><b>Note:</b> This transaction does not appear in PeopleSoft Supply Chain Management.</p> <p><i>SO</i> (sales order): Used to price online sales order and quote transactions in PeopleSoft Order Management.</p> <p><i>SOBT</i> (sales order batch): Used to price batch sales orders and quote transactions in PeopleSoft Order Management.</p> <p><i>LP</i> (weight and volume pricing): Used for weight and volume pricing on the sales order and quote in PeopleSoft Order Management.</p> <p><i>LPBT</i> (weight and volume batch): Used for batch weight and volume pricing on the sales order and quote in PeopleSoft Order Management.</p> <p><i>RMA</i> (customer returns): Used to price customer returns in PeopleSoft Order Management.</p> |

## Price-by Key Field Page

Use the Price-by Key Field page (EOEP\_APPKEY\_FIELD) to select the price-by fields that are used to price the transaction.

Navigation:

**Set Up Financials/Supply Chain**, and then **Common Definitions**, and then **Pricing Registration**, and then **Transaction Price-by Keys**, and then **Price By Key Field**

This example illustrates the fields and controls on the Price-by Key Field page (1 of 2). You can find definitions for the fields and controls later on this page.

Price-by Key Field

Price List Fields

Transactions to be Priced

| Transaction | Description |
|-------------|-------------|
| SO          | Sales Order |

Price-by Key Fields

Personalize | Find | View All |

First 1-20 of 96 Last

| Record          | Field Name        | Description                | Prompt Table    |  |
|-----------------|-------------------|----------------------------|-----------------|--|
| EOEP_DERIVED_WK | CUSTOMER_GROUP    | Customer Group             | CUSTGP_PRC_VW   |  |
| EOEP_DERIVED_WK | IMMEDIATE_PAYMENT | Immediate Payment Required | PRC_IMMPAY_VW   |  |
| EOEP_DERIVED_WK | PRODUCT_GROUP     | Product Group              | PRODGP_PRC_VW   |  |
| EOEP_DERIVED_WK | REGION_CD         | Region Code                | REGNCD_PRC_VW   |  |
| ORD_HDR_PRC_VW  | ADDRESS_SEQ_NUM   | Address Sequence Number    | CUST_ADDRBLL_VW |  |
| ORD_HDR_PRC_VW  | ADDRESS_SEQ_SOLD  | Primary Address - Sold To  | CUST_PRC_SLD_VW |  |
| ORD_HDR_PRC_VW  | BILL_TYPE_ID      | Bill Type Identifier       | PRC_BI_TYPE_VW  |  |
| ORD_HDR_PRC_VW  | BROKER_ID         | Broker ID                  |                 |  |
| ORD_HDR_PRC_VW  | BUSINESS_UNIT     | Business Unit              | SP_BU_OM_NONVW  |  |
| ORD_HDR_PRC_VW  | CORPORATE_CUST_ID | Corporate Customer         | CUST_CC_A1S_VW  |  |
| ORD_HDR_PRC_VW  | CR_CARD_TYPE      | Credit Card Type           | ORDENT_CCTYP_VW |  |
| ORD_HDR_PRC_VW  | CUSTOMER_TYPE     | Customer Type              | PRC_CUSTYPE_VW  |  |
| ORD_HDR_PRC_VW  | CUST_CHANNEL      | Customer Channel           | ORDENT_CHAN_VW  |  |
| ORD_HDR_PRC_VW  | CUST_FIELD_C10_A  | Customer Char 10 A         |                 |  |
| ORD_HDR_PRC_VW  | CUST_FIELD_C10_B  | Customer Char 10 B         |                 |  |

This example illustrates the fields and controls on the Price-by Key Field page (2 of 2). You can find definitions for the fields and controls later on this page.

▼ Select Price-by Key Fields      Personalize | Find | View 100 | [Print] | [Refresh]      First 1-20 of 264 Last

| Select                              | Record          | Field Name        | Description                |
|-------------------------------------|-----------------|-------------------|----------------------------|
| <input type="checkbox"/>            | CA_CONTR_HDR    | BUSINESS_UNIT     | Business Unit              |
| <input type="checkbox"/>            | CA_CONTR_HDR    | CONTRACT_NUM      | Contract                   |
| <input type="checkbox"/>            | CA_CONTR_HDR    | CONTRACT_TYPE     | Contract Type              |
| <input type="checkbox"/>            | CA_CONTR_HDR    | REGION_CD         | Region Code                |
| <input type="checkbox"/>            | CA_CONTR_HDR    | SOLD_TO_CUST_ID   | Sold To Customer           |
| <input type="checkbox"/>            | CA_DETAIL       | ADDR_SEQ_NUM_SHIP | Address Sequence Number    |
| <input type="checkbox"/>            | CA_DETAIL       | PRODUCT_GROUP     | Product Group              |
| <input type="checkbox"/>            | CA_DETAIL       | PRODUCT_ID        | Product ID                 |
| <input type="checkbox"/>            | CA_DETAIL       | RNW_CYCLE_NBR     | Renewal Plan Cycle         |
| <input type="checkbox"/>            | CA_DETAIL       | RNW_PKG_ID        | Renewal Plan               |
| <input type="checkbox"/>            | CA_DETAIL       | SHIP_TO_CUST_ID   | Ship To Customer           |
| <input checked="" type="checkbox"/> | EOEP_DERIVED_WK | CUSTOMER_GROUP    | Customer Group             |
| <input checked="" type="checkbox"/> | EOEP_DERIVED_WK | IMMEDIATE_PAYMENT | Immediate Payment Required |
| <input checked="" type="checkbox"/> | EOEP_DERIVED_WK | PRODUCT_GROUP     | Product Group              |
| <input checked="" type="checkbox"/> | EOEP_DERIVED_WK | REGION_CD         | Region Code                |

Build Price-by Key Fields

**Field or Control****Description****Price-by Key Fields**

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

**Build Price-by Key Fields**

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

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

**Select Price-by Key Fields**

Select additional price-by fields.

**Note:** The number of pricing keys that you can define is not limited; however, system performance slows when the number of keys increases. In addition, you might need to change the application code to pass the value to the Enterprise Pricer. For example, if you add a new field for sales orders, you must add code to the sales order to pass the value of the new field when calling Enterprise Pricer. You must perform this customization for both online and batch pricing. The RMA transaction uses the same pricing keys as the Sales Order transaction. Therefore, there is no need to set up pricing keys specific to the RMA transaction.

## Price List Fields Page

Use the Price List Fields page (EOEP\_APPLIST\_FLDS) to select valid price-list-related business objects that are used when creating price lists and when defining the price list lookup method.

Navigation:

**Set Up Financials/Supply Chain**, and then **Common Definitions**, and then **Pricing Registration**, and then **Transaction Price-by Keys**, and then **Price List Fields**

| Field or Control         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Price List Lookup</b> | <p>Select how you want the system to perform price list lookup. Values are:</p> <p><i>Consider all prices:</i> The system considers all matching price lists based on the related business objects and price rules that you have attached to the price lists. It then selects the lowest price for the product.</p> <p><i>Lookup in priority order:</i> The system establishes the order for the price list lookup based on the values in the <b>Price-by Key Fieldnames Priority</b> section. Use this method to establish a hierarchical method for selecting the list price for the transaction. If <i>Lookup in priority order</i> is used, the price list with the higher priority will be used. If there are multiple price lists with same priority, the one with the lowest price will be used.</p> <p><b>Note:</b> If the price list and related objects do not require the definition of a complex price condition, you may use the price list related objects.</p> |
| <b>Key Field Code</b>    | <p>Select price-by keys to define the valid related business objects for a price list. These values are available as related business objects on the Price List Related Object page. They are a subset of the Price-by Key Fields for the transaction.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Priority</b>          | <p>Establish a hierarchical order to price list lookups by entering a numeric value. This field is available only if you select the <i>Lookup in priority order</i> option in the <b>Price List Lookup</b> field.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

## Pricing Dates Page

Use the Pricing Dates page (EOEP\_DATE\_VAR) to set up dates used for pricing process.

Navigation:

**Set Up Financials/Supply Chain**, and then **Common Definitions**, and then **Pricing Registration**, and then **Pricing Dates**

| Field or Control   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Date Name</b>   | <p>Enter a date variable name. The name must:</p> <ul style="list-style-type: none"> <li>• Begin with an alpha character (for example, A through Z).</li> <li>• Consist of only alphanumeric characters (for example, A through Z, 0 through 9) and " _ ".</li> <li>• (Optional) Begin with &amp;.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Date Type</b>   | <p>Select the date type. Values are:</p> <p><i>Requested Arrival Date:</i> The date that the customer wants the order to arrive on site. This option is used only by PeopleSoft Supply Chain Management installations.</p> <p><i>Effective Date:</i> The date the transaction takes place, for example, the order date in OM.</p> <p><i>Order Date:</i> The date that the order header is created. The system uses the current date as the default date on a sales order header, but you can enter another date.</p> <p><i>Price Date:</i> The date specified on the arbitration plan. For example, on the price formula, you can specify Price Date &lt;= January 1, 2005. If the arbitration plan used specifies Price Date = Scheduled Ship Date. When the price formula is evaluated, Scheduled Ship Date &lt;= January 1, 2005 is evaluated.</p> <p><i>Schedule Ship Date:</i> The date the order line is scheduled to ship. The system calculates this date from the requested arrival date, using the transit lead time and exception ship dates. You can, however, enter another date. This option is used only by PeopleSoft Supply Chain Management installations.</p> <p><i>System Date:</i> The current server date, that is, the system variable %Date.</p> <p><i>User Date:</i> A customer-defined date.</p> <p><b>Note:</b> This PeopleSoft application does not automatically support a defined User Date. Implementation requires that the transaction pass the value for each user date when Enterprise Pricer is called. For example, if you add a user date for sales order, then you also must add code in sales order to pass the values. For sales orders, an API has been created for you to easily implement required logic. See example implementation class SCM_OM_API:Sample:SamplePricerInputLine for more information. The same API is used to pass customer-defined pricing variables.</p> |
| <b>Description</b> | <p>Provide a description for the pricing date. Used when selecting the pricing dates.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Record</b>      | <p>Select the record from which you wish to pull the date value. Applies only when the pricing variable selected is <i>User Date</i>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

| Field or Control  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Field Name</b> | Select the field from which you want to pull the date value. Applies only when the pricing variable selected is <i>User Date</i> .<br><br><b>Note:</b> Enterprise Pricer does not use <b>Record</b> and <b>Field Name</b> to automatically retrieve the value for the user date. These fields are only for the convenience of the implementation of user dates. For example, you can use the values in these fields to automatically retrieve the value for the user date and pass them to the Enterprise Pricer. |

## Pricing Variables Page

Use the Pricing Variables page (EOEP\_PRICE\_VAR) to set up variables that are used in price rule formulas when defining mathematical expressions.

Navigation:

**Set Up Financials/Supply Chain**, and then **Common Definitions**, and then **Pricing Registration**, and then **Create Pricing Variables**

| Field or Control             | Description                                                                 |
|------------------------------|-----------------------------------------------------------------------------|
| <b>Pricing Variable Name</b> | Enter a variable name. The format of the name is the same as pricing dates. |

| Field or Control      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Pricing Variable Type | <p>Select a variable type. All of the variable types, except <i>User Variable</i>, are Pricer variables whose values are known to Enterprise Pricer, either because the values are computed by the Enterprise Pricer (for example, the current net price) or because they are explicitly passed from the transaction (for example, the product cost by sales order). The variable types are:</p> <p><i>Alternate Product Cost:</i> The alternate product cost of the transaction line. If not provided, value of Product Cost is used.</p> <p><i>Base Price:</i> The base price used in the pricing calculation. Select from list price, product cost or alternative product cost, buying agreement price.</p> <p><i>Index Start Value:</i> Price index start value. It is automatically retrieved by Enterprise Pricer based on the index start date specified by the transaction.</p> <p><i>Index End Value:</i> Price index end value. It is automatically retrieved by Enterprise Pricer based on the index end date specified by the transaction.</p> <p><i>Index Start Amount:</i> The start amount to apply the index adjustment. The amount is passed from transaction (for example, Contracts). If it is not provided, then the value of Base Price is used.</p> <p><i>Net Price:</i> The current calculated net price (running net price).</p> <p><i>List Price:</i> The list price of the transaction line.</p> <p><i>Product Cost:</i> The product cost of the transaction line.</p> <p><i>Buying Agreement Price:</i> The buying agreement price is used in the pricing calculation.</p> <p><i>Rollup Quantity:</i> The rolled-up quantity of the transaction lines that match the price rule. This value is used to select the price formula breaks.</p> <p><i>Rollup Amount:</i> The rolled-up amount of the transaction lines that match the price rule. This value is used to select the price formula breaks.</p> <p><i>Rollup Weight:</i> The rolled-up weight of the transaction lines that match the price rule. This value is used to select the price formula breaks.</p> <p><i>Rollup Volume:</i> The rolled-up volume of the transaction lines that match the price rule. This value is used to select the price formula breaks.</p> <p><b>Note:</b> <i>Index Start Amount</i>, <i>Index Start Value</i>, and <i>Index End Value</i> are currently only used by Contracts.</p> <p><i>Trans Extended Base Price:</i> Sum of the extended base price for the entire transaction.</p> <p><i>Trans Extended List Price:</i> Sum of the extended list price for the entire transaction.</p> |

| Field or Control  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | <i>Trans Extended Net Price:</i> Sum of the extended net price for the entire transaction.<br><i>Trans Extended Product Cost:</i> Sum of the extended product cost for the entire transaction.<br><i>User Variable:</i> Customer-defined variable.<br><b>Note:</b> Not all variables are available in all situations.                                                                                                                                                                                                                        |
| <b>Record</b>     | Select the record from which you want to pull the variable value. Applicable only when the pricing variable selected is User Variable.                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Field Name</b> | Select the numeric field from which you want to pull the variable value. Applicable only when the pricing variable selected is <i>User Variable</i> .<br><b>Note:</b> Enterprise Pricer does not use <b>Record</b> and <b>Field Name</b> to automatically retrieve the value for the user variable. These fields are only for the convenience of the implementation of user variables. For example, you can use the values in these fields to automatically retrieve the value for the user variable and pass them to the Enterprise Pricer. |

# 4

## Using Pricing Data Enterprise Integration Points

### Understanding Pricing EIPs

This section discusses:

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

### Pricing EIPs

PeopleSoft Supply Chain Management applications are delivered with many enterprise integration points (EIPs) for sending and receiving pricing data to and from a third-party system. These EIPs are service operations within PeopleSoft Integration Broker.

The service operations in PeopleSoft Integration Broker are delivered with a default status of *Inactive*. You must activate each service operation before attempting to send or receive data from a third-party source or another PeopleSoft application, such as PeopleSoft Customer Relationship Management (CRM).

To set up your integration, use the information in the following table and refer setup instructions in the PeopleSoft Supply Chain Management Integrations documentation.

See PeopleSoft Supply Chain Management Integration: Setting Up Service Operations.

| Service Operation                                                 | Direction and Type   | Handlers       | Chunking Available? | Integrates With |
|-------------------------------------------------------------------|----------------------|----------------|---------------------|-----------------|
| ARBITRATION_PL<br>AN_FULLSYNC                                     | Inbound/<br>Outbound | ProcessMessage | No                  | Third party     |
| ARBITRATION_PL<br>AN_SYNC                                         | Asynchronous         |                |                     |                 |
| This EIP includes all of the data in the Arbitration Plan tables. |                      |                |                     |                 |

| Service Operation                                                                                                                                                                                                                                                                                                                                                                                                                                           | Direction and Type                   | Handlers       | Chunking Available? | Integrates With |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|----------------|---------------------|-----------------|
| (PRICE_LIST_DET<br>AIL_FULLSYNC,<br>PRICE_LIST_DET<br>AIL_SYNC)                                                                                                                                                                                                                                                                                                                                                                                             | Inbound/<br>Outbound<br>Asynchronous | ProcessMessage | No                  | Third party     |
| <p>This EIP includes only the detail table of price lists. It is provided so that you can separate the header and detail in different messages. For example, when there are many detail records, you might want to separate the header and detail into separate messages to achieve better performance.</p> <p><b>Note:</b> The Price List Header EIP must already exist in the system. It is recommended that you run the Price List Header EIP first.</p> |                                      |                |                     |                 |
| (PRICE_LIST_FUL<br>LSYNC,<br>PRICE_LIST_SYNC)                                                                                                                                                                                                                                                                                                                                                                                                               | Inbound/<br>Outbound<br>Asynchronous | ProcessMessage | No                  | Third party     |
| <p>This EIP includes all the tables for price lists. It is suitable when the number of detail records for a price list is not enough to reduce performance.</p>                                                                                                                                                                                                                                                                                             |                                      |                |                     |                 |

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

See the product documentation for *PeopleTools: Integration Broker*

**Related Topics**

- PeopleSoft Supply Chain Management Integration: Setting Up Service Operations

## Methods for Sending Pricing Data

You can send pricing data in these ways:

- Online in real time. This method is associated with online pages.  
When data from the online pages is saved, the changed data is sent to the external systems. This result occurs only for active EIPs.
- Using batch publish. Use the Pricing Data Publish page to select the pricing data to send to external systems.

To use this method, you must set up Batch Publish Rules (samples rules are provided).

**Note**

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

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

**Related Topics**

- PeopleSoft Supply Chain Management Integration: PeopleSoft SCM Inbound EIPs

## Staging Tables for Loading Pricing Data

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

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

| EIP Staging Table | Enterprise Pricer Application Table | Description                  |
|-------------------|-------------------------------------|------------------------------|
| EOEP_ARBPLN_EC    | EOEP_ARB_PLAN                       | Price Arbitration Plan       |
| EOEP_ARBSEQ_EC    | EOEP_ARB_SEQ                        | Price Arbitration Attributes |
| EOEP_RULE_EC      | EOEP_RULE                           | Price Rule                   |
| EOEP_COND_EC      | EOEP_CONDITION                      | Price Condition              |
| EOEP_CONJ_EC      | EOEP_COND_CONJ                      | Price Condition Conjunction  |
| EOEP_FORM_EC      | EOEP_FORMULA                        | Price Formula                |
| EOEP_RDST_EC      | EOEP_RULE_DST                       | Price Rule Distribution      |
| EOEP_DRANGE_EC    | EOEP_DATE_RANGE                     | Pricing Date Range Record    |
| EOEP_FRANGE_EC    | EOEP_FORM_RANGE                     | Pricing Formula Range Record |

| EIP Staging Table | Enterprise Pricer Application Table | Description                  |
|-------------------|-------------------------------------|------------------------------|
| EOEP_KVCNT_EC     | EOEP_KEYVAL_CNT                     | Pricing Key Value Count      |
| EOEP_RKVAL_EC     | EOEP_RULEKEYVAL                     | Pricing Rule Key Values      |
| EOEP_PLHDR_EC     | EOEP_PRCLST_HDR                     | Price List Header            |
| EOEP_PLIST_EC     | EOEP_PRICE_LIST                     | Price List Detail            |
| EOEP_RLLNK_EC     | EOEP_RULLST_LNKK                    | Price List - Price Rule Link |

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

#### Note

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

The Load Pricing Data process performs validations such as these:

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

#### Note

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

In case of real-time EIPs (EIPs that are sent from the online pricing pages), the Load Pricing Data process runs automatically. If pricing is received as flat files from external systems, use the Flat Files Utility to load data into the target system. Data is stored in the staging tables, and then the Load Pricing Data process is run to load the data into the application tables.

## Sending Pricing Data

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

# Page Used to Send Pricing Data

| Page Name                                 | Definition Name    | Usage                                               |
|-------------------------------------------|--------------------|-----------------------------------------------------|
| <a href="#">Publish Pricing Data Page</a> | EOEP_PRICE_EXTRACT | Submit the background process to send pricing data. |

## Publish Pricing Data Page

Use the Publish Pricing Data page (EOEP\_PRICE\_EXTRACT) to submit the background process to send pricing data.

Navigation:

**Pricing Configuration**, and then **Pricing Data Exchange**, and then **Publish Pricing Data**

This example illustrates the fields and controls on the Publish Pricing Data page. You can find definitions for the fields and controls later on this page.

### Publish Pricing Data

Run Control ID PR Report Manager Process Monitor Run

Process Options

\*Process Name

Arbitration Plan

Price Rule

Price List

| Field or Control                                   | Description                                                                                                                                                                                                                                                                                                          |
|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Process Name</b>                                | Select the name that you want to use to group EIPs that you want to publish together. All EIPs with this name are processed together. Set up process names using the Batch Publish Rules page: Batch Programs tab. To process the EIPs together, enter the same process name for each EIP on the Batch Programs tab. |
| <b>Updated After Date</b>                          | Select the data that you want published by the last update date.                                                                                                                                                                                                                                                     |
| <b>Arbitration Plan, Price Plan and Price List</b> | Select at least one value to send the EIPs. You can enter additional values as needed.                                                                                                                                                                                                                               |

## Reviewing and Correcting Pricing Data

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

### Pages Used to Review and Correct Pricing Data

| Page Name                         | Definition Name    | Usage                                                                      |
|-----------------------------------|--------------------|----------------------------------------------------------------------------|
| Arbitration Plan Inquiry Page     | EOEP_ARB_PLAN_INQ  | Search for arbitration plan data in the staging tables.                    |
| Price Arbitration Attributes Page | EOEP_ARB_SEQ_INQ   | Search for arbitration plan attribute data in the staging table.           |
| Arbitration Plan Detail Page      | EOEP_ARBPLN_EC_UPD | View and correct an error in the arbitration plan.                         |
| Attribute Detail Page             | EOEP_ARBSEQ_EC_UPD | View and correct errors in the arbitration plan attributes.                |
| Price Rule Inquiry Page           | EOEP_RULE_INQ      | Search for price rule data in the staging tables.                          |
| Price Rule Detail Page            | EOEP_RULE_EC_UPD   | View and correct an error in the price rule.                               |
| Price Conditions Page             | EOEP_COND_INQ      | View price condition data.                                                 |
| Price Condition Detail Page       | EOEP_COND_EC_UPD   | View and correct an error in the price condition.                          |
| Price Condition Conjunctions Page | EOEP_CONJ_INQ      | View condition conjunction data for the price rule.                        |
| Condition Conjunction Detail Page | EOEP_CONJ_EC_UPD   | View and correct an error in the condition conjunction for the price rule. |
| Price Formulas Page               | EOEP_FORM_INQ      | View price formula data for the price rule.                                |
| Price Formula Detail Page         | EOEP_FORM_EC_UPD   | View and correct an error in the price formula for the price rule.         |
| Price Rule Distributions Page     | EOEP_RDST_INQ      | View price rule distribution data for the price rule.                      |

| Page Name                           | Definition Name                          | Usage                                                                                                                                                                                                                              |
|-------------------------------------|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Price Rule Distribution Detail Page | EOEP_RDST_EC_UPD                         | View and correct an error in the price rule distribution for the price rule.                                                                                                                                                       |
| Price Date Ranges Page              | EOEP_DRANGE_INQ                          | View price date ranges.                                                                                                                                                                                                            |
| Price Rule Date Ranges Page         | EOEP_DRANGE_EC_UPD                       | View price rule date ranges.                                                                                                                                                                                                       |
| Price Formula Ranges Page           | EOEP_FRANGE_INQ                          | View price formula ranges.                                                                                                                                                                                                         |
| Price Rule Formula Ranges Page      | EOEP_FRANGE_EC_UPD                       | View price rule formula ranges.                                                                                                                                                                                                    |
| Price List Inquiry Page             | EOEP_PRCLST_H_INQ                        | Search for price list data in the staging tables.                                                                                                                                                                                  |
| <a href="#">Price List Page</a>     | EOEP_PLHDR_EC_UPD                        | View and correct an error in the price list header.                                                                                                                                                                                |
| Price List Detail Inquiry Page      | EOEP_PRCLST_D_INQ,<br>EOEP_PRCLST_DH_INQ | Search and view price list details.<br><br>For price list details that do not have corresponding headers, for example, data from Price List Detail only messages, click the <b>Search Price List Details Without Headers</b> link. |
| Price List Detail Page              | EOEP_PLIST_EC_UPD                        | View and correct an error in the price list detail.                                                                                                                                                                                |
| Price List - Price Rule Links Page  | EOEP_RLLNK_INQ                           | Search and view price rules for the price list.                                                                                                                                                                                    |
| Price Rule Link Detail Page         | EOEP_RLLNK_EC_UPD                        | View and correct an error in the price rule for the price list.                                                                                                                                                                    |

## Understanding the Error Correction Process

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

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

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

## Common Elements Used in This Topic

| Field or Control                                                                  | Description                                                                                                                                                                        |
|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Full Sync</b>                                                                  | Select Y (yes) to select full sync EIPs or N (no) to <i>not</i> select full sync EIPs.                                                                                             |
| <b>Status</b>                                                                     | Select to narrow the search criteria.                                                                                                                                              |
| <b>Search</b>                                                                     | Click this button to search after entering search criteria.                                                                                                                        |
| <b>Clear</b>                                                                      | Click this button to clear the search results.                                                                                                                                     |
|  | Click the Update button to view and update the errors.                                                                                                                             |
| <b>Delete</b>                                                                     | Click this button to delete the selected row from the staging tables. All related data (child data) is also deleted. You receive a warning message before the delete is processed. |
| <b>Select this row</b>                                                            | Select this option to select a row. Then, click the links at the bottom of the page to navigate to the details about the data.                                                     |

## Loading Data into Enterprise Pricer

This section discusses how to load pricing data.

### Page Used to Load Pricing Data

| Page Name                              | Definition Name | Usage                                                                  |
|----------------------------------------|-----------------|------------------------------------------------------------------------|
| <a href="#">Load Pricing Data Page</a> | EOEP_PRICE_LOAD | Load pricing data from the staging tables into the application tables. |

### Load Pricing Data Page

Use the Load Pricing Data page (EOEP\_PRICE\_LOAD) to load pricing data from the staging tables into the application tables.

Navigation:

**Pricing Configuration**, and then **Pricing Data Exchange**, and then **Load Pricing Data**

This example illustrates the fields and controls on the Load Pricing Data page. You can find definitions for the fields and controls later on this page.

Load Pricing Data

Run Control ID PR Report Manager

Process Monitor

Run

Process Options

\*Pricing Data to Load

Price List

☒ Perform Data Validation

☐ Load Full Sync Data

| Field or Control        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Pricing Data to Load    | Select <i>Arbitration Plan</i> , <i>Price List</i> , or <i>Price Rule</i> to load the pricing data individually. You can also select <i>All</i> to load all the pricing data.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Perform Data Validation | Select this option to validate the data during the loading process.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Load Full Sync Data     | <p>Select this option if you want to process data from full sync EIPs. Data received after the last full sync EIP is not processed, and data received before the full sync EIP is discarded. If this option is not selected, then only incremental sync data received before any full sync EIP is processed.</p> <p>For example, EIPs are received in this order: Price Rule incremental sync and Price Rule full sync, and Price Rule incremental sync. If the <b>Load Full Sync Data</b> option is not selected, the first Price Rule incremental sync EIP is processed. If the option is selected, the Price Rule full sync EIP is processed. Because the first Price Rule incremental sync was received before the full sync EIP, it is discarded. Also, because the last Price Rule incremental sync EIP is received after the full sync EIP, it is not selected for process. After the Price Rule full sync EIP is processed, the last Price Rule incremental sync EIP is processed from this page.</p> <p><b>Note:</b> Oracle recommends that you process EIPs as soon as you receive them.</p> |

| Field or Control              | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Full Sync Error Option</b> | <p>This option is available only if the <b>Load Full Sync Data</b> option is selected.</p> <p>If the process encounters errors with the data, select either:</p> <ul style="list-style-type: none"><li>• <b>No Data Will Be Loaded.</b><br/>All of the data is left in the staging tables. Existing data in the application tables will not change.</li><li>• <b>Valid Rows Will Be Loaded.</b><br/>If selected, the application table is replaced with valid data from the full sync EIP. Any invalid full sync data is left in the staging table with the full sync flag deselected so that you can correct them and load them later as incremental sync data.</li></ul> |

# 5

## Creating Price Lists

### Understanding Price Lists

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

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

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

- Lookup in priority order.

The system performs a search to match the related business objects in the defined priority order and then selects the list price with the highest priority.

#### Note

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

- Consider all prices.

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

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

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

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

**Note**

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

### Quantity Breaks within Price List

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

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

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

**Note**

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

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

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

**Note**

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

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

10. Set the list price to 2.00 and click the Add a New Row button.

11. Click Save.

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

## Setting Up Price Lists

This section lists common elements and discusses how to set up price lists.

### Pages Used to Set Up Price Lists

| Page Name                            | Definition Name    | Usage                                                                                                                                                       |
|--------------------------------------|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Price List Search Page               | EOEP_PLST_SRCH_PG  | Use to search price lists by related business objects.                                                                                                      |
| <a href="#">Price List Page</a>      | EOEP_PRICE_LIST    | Set up price lists in multiple currencies and create start and end dates for each product's price.                                                          |
| Product Notes Page                   | EOEP_PRC_LIST_NOTE | View notes that are associated with the product.<br>This option is only used in PeopleSoft CRM.                                                             |
| <a href="#">Related Objects Page</a> | EOEP_PRCLST_ATTCH  | Associate a price list with related business objects, such as a customer, customer group, or region, and to associate price rules directly to a price list. |

#### Related Topics

- [Enterprise Pricer Reports: A to Z](#)  
This section discusses:

### Common Elements Used in This Topic

| Field or Control | Description                                                                                                                                                                                                                                |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Status</b>    | Values are:<br><i>Active:</i> Product prices on this list automatically supersede the product list price in transactions involving any related business objects.<br><i>Inactive:</i> This list is ignored when calculating product prices. |
| <b>Product</b>   | Use to search for a product ID, enter a new product ID, and view the product IDs that are in a price list.                                                                                                                                 |

# Price List Page

Use the Price List page (EOEP\_PRICE\_LIST) to set up price lists in multiple currencies and create start and end dates for each product's price.

Navigation:

**Pricing Configuration**, and then **Create Pricing Information**, and then **Price List Maintenance**

This example illustrates the fields and controls on the Price List page. You can find definitions for the fields and controls later on this page.

Price List

Related Objects

Price List

|               |               |       |
|---------------|---------------|-------|
| Price List ID | Currency Code | SetID |
| HIGH-END      | USD           | SHARE |

\*Description

High End Items

\*Status

Active

Search

Product ID

begins with

Description

contains

Search

Clear

Add Product

New Product ID

Add

&Pricing Information

Personalize

Find

View All

First

1 of 1

Last

Pricing Information

Additional Information

| Product ID | *UOM | Start Date | End Date | Low Quantity | High Quantity  | *Status | List Price |   |   |
|------------|------|------------|----------|--------------|----------------|---------|------------|---|---|
|            |      | 01/24/2013 |          | 0.0000       | 9999999999.999 | Active  | 0.0000     | + | - |

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Currency Code    | <p>Use to establish the same price list with the same price list ID in multiple currencies. The price list is considered if the transaction is entered in the same currency as that of the price list.</p> <p>If <i>No Price List Auto Conversion</i> option is selected, it allows the usage of the price list in base currency if no matching price list is found in the transaction currency. The price list in the base currency will be converted to the transaction currency and used as the price list.</p> |

**Search**

| Field or Control   | Description                                                                                                                                                                                                                                      |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Search</b>      | Click to select the price list detail based on the search criteria and view additional price list information. The price list detail appears in the Pricing Information tab. Click the <b>Clear Search</b> button to remove the search criteria. |
| <b>Description</b> | Search for products by using elements of the product description or product ID.                                                                                                                                                                  |

**Add Product**

| Field or Control      | Description                                                                                                               |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------|
| <b>New Product ID</b> | Use to add a product ID to price list. Add additional information for the product in the <b>Pricing Information</b> grid. |
| <b>Add</b>            | Click after you enter the product ID. This adds the product to the price list.                                            |

**Pricing Information Tab**

Select the Pricing Information tab.

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

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                        |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Frequency</b> | Use to select a recurring frequency in PeopleSoft CRM Order Capture. If you select this option, the amount that is in the List Price field represents a recurring charge. If not, the list price represents a onetime charge.<br>Options include: <i>Annually, Daily, Monthly, Quarterly, and Weekly.</i><br><b>Note:</b> This option is not used in PeopleSoft SCM installations. |

#### Additional Information Tab

Select the Additional Information tab.

| Field or Control      | Description                                                                                                                                                                                                                                                                                                           |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Recurring Note</b> | Click this button to enter and view notes relating to recurring charges for the product. These notes are informational only and separate from the standard product notes that are defined in the product definition component.<br><b>Note:</b> This option is only available in PeopleSoft CRM installations.         |
| <b>Protected</b>      | If you select the check box, the system does not apply adjustments to the base list price. The price-protected flag on the transaction is activated.<br><b>Note:</b> If a product with the same price is on two different price lists and one is price protected, the price-protected one is used in the transaction. |

## Related Objects Page

Use the Related Objects page (EOEP\_PRCLST\_ATTCH) to associate a price list with related business objects, such as a customer, customer group, or region, and to associate price rules directly to a price list.

Navigation:

Click the **Related Objects** tab on the Price List page.

This example illustrates the fields and controls on the Related Objects page. You can find definitions for the fields and controls later on this page.

Price List

Related Objects

Price List

| Price List ID | Currency Code | SetID |
|---------------|---------------|-------|
| HIGH-END      | USD           | SHARE |

Description High End Items      Status Active

Related Business Objects

Find | View All      First 1 of 1 Last

Transaction Sales Order

Also Used by Transaction:

☒ Buying Agreement

☒ Customer Returns

☒ Price Book

☒ Sales Order Batch

Related Objects

Personalize | Find |      First 1 of 1 Last

| Field Name | Identifier | Search | Match these Values |
|------------|------------|--------|--------------------|
|            |            |        |                    |

Related Price Rule

Personalize | Find |      First 1-2 of 2 Last

| Rule  | Description |
|-------|-------------|
| PL-09 | PL-09       |
| PL-14 | PL-14       |

| Field or Control         | Description                                                                                                                                                                                                                                                                  |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Transaction              | You select a transaction to define the related objects to associate with the price list. The transaction determines the list of available values to select in the <b>Related Objects</b> group box. You can associate a price list to more than one transaction code.        |
| Also Used by Transaction | The <b>Also Used by Transaction</b> allows user the ability to specify whether the related object is applicable to child applications. For example, when sales order is selected as transaction, you will have the option to indicate whether it is applicable to RMAs also. |
| Field Name               | Select a value to tie a business object to the price list. The values are defined when you establish the price-by keys for each transaction on the Price-by key Fields page.                                                                                                 |
| Identifier               | Enter values for the business object. You can enter multiple values by separating them with a comma.<br><br>If the field name and identifier criteria match those that are on a particular transaction, this price list is considered for that transaction.                  |

---

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                                     |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Rule</b>      | <p>Select a price rule to tie the price list to the price rule.</p> <p>You can associate a price rule directly with the price list. The price rule conditions define the part of the transaction that must match before the price list is considered at pricing time.</p> <p><b>Note:</b> Price rules are used to define more complicated conditions. Business objects are used to define simpler, less complex conditions.</p> |

---

# 6

## Creating Price Rules

### Understanding Price Rules

This section discusses:

- Rounding rules.
- Pricing rules.
- Pricing formula scenarios.

### Rounding Rules

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

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

### Pricing Rules

A price rule defines the conditions that the transaction must meet for the adjustments to apply. The price rule consists of one or more price conditions and one or more price formulas. The price condition defines the set of circumstances that make a price rule applicable to a transaction. The price formula defines the actions that take place when the pricing conditions are met.

#### Price Rule Conditions

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

This is the process for entering a price rule condition in basic mode:

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

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

**Note**

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

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

| Term                  | Definition                                                                                                                           |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| <i>Pending:</i>       | Price rule is incomplete. Price rule validation is not performed when you save the rule.                                             |
| <i>Deployed:</i>      | Price rule is available for use in price calculations.                                                                               |
| <i>Ready to Test:</i> | Price rule is complete. The price rule is available for use in the simulator, but not for price calculations.                        |
| <i>Inactive:</i>      | Price rule is not active. The rule is not available for any price calculations. Use to inactivate a rule that was previously in use. |

3. Enter a description for the price rule.

This is a free-form text field.

4. Enter a short description.

A truncated version of the long description appears by default.

5. Select the child applications the price rule can be applied to, if the transaction has child applications that use its pricing data.

6. Select a field name in the **Rule Conditions** group box.

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

7. Click the **Search** button to select values for the field names.

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

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

This is the process for entering a price rule condition in advanced mode:

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

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

**Note**

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

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

| Term                  | Definition                                                                                                                           |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| <i>Pending:</i>       | Price rule is incomplete. Price rule validation is not performed when you save the rule.                                             |
| <i>Deployed:</i>      | Price rule is available for use in price calculations.                                                                               |
| <i>Ready to Test:</i> | Price rule is complete and is available for use in the simulator but not for price calculations.                                     |
| <i>Inactive:</i>      | Price rule is not active. The rule is not available for any price calculations. Use to inactivate a rule that was previously in use. |

3. Enter a description for the price rule.

This is a free-form text field.

4. Enter a short description.

A truncated version of the long description appears by default.

5. Select the child applications the price rule can be applied to, if the transaction has child applications that use its pricing data.

6. Select a field name in the **Rule Conditions** group box.

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

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

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

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

8. Select the rows in the **Combined Conditions** group box that you want to use to create a more complex condition.

9. Select either the AND or the OR operator.

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

The system automatically inserts the new condition in the **Combined Conditions** group box.

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

**Note**

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

## Pricing Formula Scenarios

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

### Discount/Surcharge Scenario

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

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

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

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

**Note**

The ID is assigned by the system and it is entered in the **Price Formulas** group box to select the date range.

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

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

**Note**

The ID is assigned by the system and it is entered in the **Price Formulas** group box to select the formula range.

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

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

**Note**

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

**Product Add - Giveaway Scenario**

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

**Note**

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

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

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

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

**Note**

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

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

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

**Note**

The ID is assigned by the system and it is entered in the **Price Formulas** group box to select the date range.

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

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

**Note**

The ID is assigned by the system and it is entered in the **Price Formulas** group box to select the formula range.

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

| Date Range ID | Formula Range ID | UOM | Product Add By | Qty/BOGO Factor |
|---------------|------------------|-----|----------------|-----------------|
| 1             | 1                | EA  | Quantity       | 1               |

**Note**

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

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

| Product ID | UOM Promo | Product Add Type |
|------------|-----------|------------------|
| 10049      | EA        | Per Order        |

**Product Add - Discounted Giveaway Scenario**

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

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

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

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

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

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

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

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

| Date Range ID | Formula Range ID | UOM | Currency | Product Add By | Quantity /BOGO Factor | Expression         | Description                     |
|---------------|------------------|-----|----------|----------------|-----------------------|--------------------|---------------------------------|
| 1             | 1                | EA  | GBP      | Qty & Adj      | 3                     | LIST_PRICE * 0.50) | Give three items at half price. |
| 1             | 1                | EA  | GBP      | Quantity       | 1                     |                    |                                 |

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

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

**Note**

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

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

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

**BOGO Scenario**

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

An example of a BOGO is "Buy three of product A, get one of product B free."

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

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

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

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

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

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

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

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

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

| Product ID | UOM Promo |
|------------|-----------|
| 10049      | EA        |

#### Note

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

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

Total Quantity of Lines Matching Price Rule/BOGO Factor.

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

For example, with a BOGO factor of 3, when the customer buys 2 they get 0 free. When they buy 3, 4, or 5 items, they get 1 free. When they buy 6, 7, or 8 items, they get 2 free items, and so on.

#### Min/Max Target Price Rule Scenario

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

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

#### Note

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

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

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

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

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

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

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

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

**Note**

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

### Minimum/Maximum Margin Scenario

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

The margin is calculated in this way:

Margin = Net Price – Product Cost

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

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

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

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

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

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

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

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

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

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

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

**Note**

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

### Tiered Price Rule Scenario

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

**Note**

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

An example of a tiered price rule is "Buy 25 of Product A. The first 25 are priced at 15 USD each, and additional units are priced at 12 USD each."

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

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

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

4. Select the **Tiered Pricing** check box and specify a tiered increment of 1.
5. In the **Date Range** group box of the Formula page, enter the date range during which this price rule applies:

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

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

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

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

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

### One-Time Only Price Rule Scenario

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

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

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

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

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

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

| Formula Range ID | Price Type | Minimum Amount | Maximum Amount |
|------------------|------------|----------------|----------------|
| 1                | Price      | 1000           | 999999999.9999 |

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

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

### Mutually Exclusive Price Rule Scenario

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

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

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

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

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

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

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

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

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

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

## Compound Date Breaks Within a Price Rule Scenario

The previous scenarios provided examples of matching a single date for applying price formulas. You can also create price rules by which multiple dates must match for the price formula to apply.

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

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

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

1. Add **Sales Orders** as the **Transaction** in the **Rule Attributes** group box of the Conditions page, and enter a description.
2. Add Sold To Customer and Customer ID 1005, and add Product ID 10050 to the **Rule Conditions** group box of the Conditions page.
3. In the **Rule Attributes** group box of the Formula page, select *Total Order Discount/Surcharge* as the **Price Action Type**.

The **Rollup By** field is automatically set to *Transaction*.

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

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

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

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

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

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

## Compound Pricing Formula Scenario

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

**Note**

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

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

**Note**

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

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

1. Select *Sales Orders* as the **Transaction** in the **Rule Attributes** group box of the Conditions page. Enter a description.
2. Add Sold To Customer and Customer ID 1005 to the **Rule Conditions** group box of the Conditions page.
3. In the **Rule Attributes** group box of the Formula page, select *Discount/Surcharge* as the **Price Action Type**.

Set the **Rollup By** field to *Transaction*.

Set the **Cascading/Summed** field to *Summed*.

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

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

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

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

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

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

**Rollup Options Within a Price Rule Scenario**

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

The rollup rule options are:

- Transaction  
Rollup is by transaction, from all order schedules that match the same price rule.
- Line  
Rollup is by order line.
- Schedule  
Rollup is by order schedule.
- Rollup Rule  
Rollup is controlled by a Rollup Rule.

Suppose this price rule is created:

Price Rule: Sinks

Price Action Type: Discount/Surcharge

Condition: Product = Sinks

Formulas:

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

The sales order contains:

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

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

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

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

| Line | Schedule | Quantity | Product | Rollup Quantity | Formula | Adjustment  |
|------|----------|----------|---------|-----------------|---------|-------------|
| 2    | 1        | 15       | Sinks   | 35              | 4       | -20 percent |
| 2    | 2        | 8        | Sinks   | 35              | 4       | -20 percent |

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

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

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

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

### Simple Rollup Price Rule Scenario

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

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

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

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

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

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

- Create the rollup rule for all items belonging to the Bathroom Fixtures product group (Group FIX).
  - Select *Sales Orders* as the **Transaction** in the **Rule Attributes** group box of the Conditions page.  
In the **Description** field, enter *Fixtures*.
  - Add Product Group to the **Rule Conditions** group box of the Conditions page, and select the product group called FIX.
  - In the **Rule Attributes** group box of the Formula page, select *Rollup Only Rule* as the **Price Action Type**.

Set the **Rollup Exclude** field to *None*.

2. For the rule that applies to products belonging to the Shower Stalls product group (Group STALL):

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

In the **Description** field, enter *Showers*.

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

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

Set the **Cascading/Summed** field to *Summed*.

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

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

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

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

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

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

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

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

In the **Description** field, enter *Tubs*.

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

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

Set the **Cascading/Summed** field to *Summed*.

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

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

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

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

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

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

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

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

In the **Description** field, enter *Sinks*.

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

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

Set the **Cascading/Summed** field to *Summed*.

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

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

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

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

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

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

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

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

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

- Order line 1 matches the Sinks price rule.  
Because the Sinks rule uses Fixture as a rollup rule, the formula matched is the formula with a minimum amount set to 21 and a maximum amount of 99, and a 20 percent discount is applied.
- Order line 2 matches the Showers price rule.  
Because the Showers rule uses Fixture as a rollup rule, the formula matched is the formula with a minimum amount of 21 and a maximum amount of 99, and an 8 percent discount is applied.
- Order line 3 matches the Tubs price rule.  
Because the Tubs rule uses Fixture as a rollup rule, the formula matched is the formula with a minimum amount of 21 and a maximum amount of 99, and a 10 percent discount is applied.

### Complex Rollup Price Rule Scenario

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

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

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

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

- Create the rollup rule for all items belonging to the Kitchen product group (Group KITC).
  - Select *Sales Orders* as the **Transaction** in the **Rule Attributes** group box of the Conditions page.

In the **Description** field, enter *Kitchen*.

- b. Add Product Group to the **Rule Conditions** group box of the Conditions page, and select the product group called KITC.
  - c. In the **Rule Attributes** group box of the Formula page, select *Rollup Only Rule* as the **Price Action Type**.
  - d. Set the **Rollup By** field to *Rollup Rule*.
  - e. Set the **Rollup Exclude** field to *None*.
2. Create the rule that provides a discount to products belonging to the towels product group (Group TOWL):
    - a. Select *Sales Orders* as the **Transaction** in the **Rule Attributes** group box of the Conditions page.  
In the **Description** field, enter *Towels*.

**Note**

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

- b. Add Product Group to the **Rule Conditions** group box of the Conditions page, and set the group ID to TOWL.
- c. In the **Rule Attributes** group box of the Formula page, select *Discount/Surcharge* as the **Price Action Type**.
- d. Set the **Rollup By** field to *Rollup Rule*, and select the FIX rollup rule.
- e. Set the **Cascading/Summed** field to *Summed*.
- f. In the **Date Range** group box of the Formula page, enter the date range during which this price rule applies:

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

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

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

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

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

3. Create a rule that provides a discount to products belonging to the Refrigerator product group (Group FRDG):
  - a. Select *Sales Orders* as the **Transaction** in the **Rule Attributes** group box of the Conditions page.  
In the **Description** field, enter *Refrigerators*.
  - b. Add Product Group to the **Rule Conditions** group box of the Conditions page, and set the group ID to FRDG.
  - c. In the **Rule Attributes** group box of the Formula page, select *Discount/Surcharge* as the **Price Action Type**.  
Set the **Rollup By** field to *Rollup Rule*, and select the KITC rollup rule.  
Set the **Cascading/Summed** field to *Summed*.
  - d. In the **Date Range** group box of the Formula page, enter the date range during which this price rule applies:

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

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

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

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

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

4. For the rule that provides a discount to products belonging to the stoves product group (Group STOV):
  - a. Select *Sales Orders* as the **Transaction** in the **Rule Attributes** group box of the Conditions page.  
In the **Description** field, enter *Stoves*.
  - b. Add Product Group to the **Rule Conditions** group box of the Conditions page, and set the group ID to STOV.
  - c. In the **Rule Attributes** group box of the Formula page, select *Discount/Surcharge* as the **Price Action Type**.  
Set the **Rollup By** field to *Rollup Rule*, and select the KITC rollup rule.  
Set the **Cascading/Summed** field to *Summed*.
  - d. In the **Date Range** group box of the Formula page, enter the date range during which this price rule applies:

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

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

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

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

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

The initial sales order had three order lines:

| Order Line | Order Qty | Product                    | Product Groups |
|------------|-----------|----------------------------|----------------|
| 1          | 10        | Kohler sink, std           | SNKS, FIX      |
| 2          | 10        | Smithson shower stall, std | STALL, FIX     |
| 3          | 5         | Delta tub, std             | TUBS, FIX      |

Three additional lines were added to the sales order:

| Order Line | Order Qty | Product                   | Product Groups |
|------------|-----------|---------------------------|----------------|
| 4          | 20        | LQ Towel Rack, small      | KITC, FIX      |
| 5          | 10        | GE refrigerator model 224 | FIX, KITC      |
| 6          | 5         | Maytag stove model 4492   | FIX, KITC      |

Each of the two rollup rules has a basket:

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

- Order line 5, GE refrigerator model 224, is discounted by 4 percent.
- Order line 6, Maytag stove model 4492, is discounted by 9 percent.

#### ① Note

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

### Maximum Quantity and Maximum UOM for Price Rule

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

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

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

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

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

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

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

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

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

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

### Pricing with a Different Base

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

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

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

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

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

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

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

**Note**

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

**Determining Net Price Using Mathematical Expressions**

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

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

1. Select *Sales Orders* as the **Transaction** in the **Rule Attributes** group box of the Conditions page.  
In the **Description** field, enter *Math Expr*.
2. Add Product ID to the **Rule Conditions** group box of the Conditions page, and set the Product ID to 10050.
3. In the **Rule Attributes** group box of the Formula page, select *Price Override* as the **Price Action Type**.

Set the **Rollup By** field to *Transaction*.

Set the **Cascading/Summed** field to *Summed*.

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

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

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

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

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

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

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

### ① Note

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

### Valid Pricing Combinations

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

| Price Action Type      | Adjustment Flag Values                                                                                                                                                                                    | Adjustment Label              | Numeric Value Label    | Text Value Label      | Minimum Amount Label | Maximum Amount Label |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|------------------------|-----------------------|----------------------|----------------------|
| Discount/<br>Surcharge | <ul style="list-style-type: none"> <li>Amount</li> <li>Percentage</li> <li>External Class</li> <li>Math Expression</li> <li>Amount and math Expression</li> <li>Percentage and math Expression</li> </ul> | Discount /<br>Surcharge<br>By | Amount /<br>Percentage | Class /<br>Expression |                      |                      |

| Price Action Type                          | Adjustment Flag Values                                                                                                                                                                                    | Adjustment Label     | Numeric Value Label    | Text Value Label   | Minimum Amount Label        | Maximum Amount Label        |
|--------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|------------------------|--------------------|-----------------------------|-----------------------------|
| Price Override                             | <ul style="list-style-type: none"> <li>Price</li> <li>External Class</li> <li>Math Expression</li> <li>Price and math Expression</li> </ul>                                                               | Price Override By    | Price                  | Class / Expression |                             |                             |
| Product Add                                | <ul style="list-style-type: none"> <li>Quantity</li> <li>BOGO</li> <li>Quantity with Adjustment</li> <li>BOGO with Adjustment</li> <li>Quantity Expression</li> </ul>                                     | Product Add By       | Quantity / BOGO Factor | Expression         |                             |                             |
| Total Order Discount/<br>Surcharge         | <ul style="list-style-type: none"> <li>Amount</li> <li>Percentage</li> <li>External Class</li> <li>math Expression</li> <li>Amount and math Expression</li> <li>Percentage and math Expression</li> </ul> | Discount / Surcharge | Amount / Percentage    | Class / Expression |                             |                             |
| Minimum/<br>Maximum<br>Target Price        | Price                                                                                                                                                                                                     | Target Price         |                        |                    | Minimum Price               | Maximum Price               |
| Minimum/<br>Maximum<br>Target<br>Discount  | <ul style="list-style-type: none"> <li>Amount</li> <li>Percentage</li> </ul>                                                                                                                              | Target Discount By   |                        |                    | Minimum Amount / Percentage | Maximum Amount / Percentage |
| Minimum/<br>Maximum<br>Target<br>Surcharge | <ul style="list-style-type: none"> <li>Amount</li> <li>Percentage</li> </ul>                                                                                                                              | Target Surcharge By  |                        |                    | Minimum Amount / Percentage | Maximum Amount / Percentage |

| Price Action Type         | Adjustment Flag Values                                                       | Adjustment Label | Numeric Value Label | Text Value Label | Minimum Amount Label        | Maximum Amount Label        |
|---------------------------|------------------------------------------------------------------------------|------------------|---------------------|------------------|-----------------------------|-----------------------------|
| Related Business Objects  |                                                                              |                  |                     |                  |                             |                             |
| Price List Only Condition |                                                                              |                  |                     |                  |                             |                             |
| Rollup Only Rule          |                                                                              |                  |                     |                  |                             |                             |
| Minimum/Maximum Margin    | <ul style="list-style-type: none"> <li>Amount</li> <li>Percentage</li> </ul> | Margin By        |                     |                  | Minimum Amount / Percentage | Maximum Amount / Percentage |
| Pricing Base              |                                                                              |                  |                     |                  |                             |                             |
| Standard Discount         |                                                                              |                  |                     |                  |                             |                             |

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

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

| Adjustment Flag                        | Numeric Value | Text Value | Minimum Amount | Maximum Amount | Market Rate Index | Small or Large |
|----------------------------------------|---------------|------------|----------------|----------------|-------------------|----------------|
| Quantity Expression                    |               | Yes        |                |                |                   |                |
| Amount and mathematical Expression     | Yes           | Yes        |                |                | Yes               | Yes            |
| Percentage and mathematical Expression | Yes           | Yes        |                |                | Yes               | Yes            |
| Price and mathematical Expression      | Yes           | Yes        |                |                | Yes               | Yes            |

## Setting Up Price Rules

This section discusses how to set up price rules.

### Pages Used to Set Up Price Rules

| Page Name                                         | Definition Name    | Usage                                                                                            |
|---------------------------------------------------|--------------------|--------------------------------------------------------------------------------------------------|
| Price Rule Search Page                            | EOEP_RULE_SRCH_PG  | Search by condition.                                                                             |
| <a href="#">Conditions Page</a>                   | EOEP_CONDITION     | Set up pricing rule conditions for each transaction.                                             |
| <a href="#">Formulas Page</a>                     | EOEP_FORMULA       | Set up price rule formulas (the actions that take place when the price rule conditions are met). |
| Search Page                                       | EOEP_SEARCH_PAGE   | Search for values for the selected price-by field in the price rule condition.                   |
| Promotion Codes Page                              | PPRC_PROMOTION     | Enter values for promotions.                                                                     |
| <a href="#">Expression Validator Page</a>         | EOEP_MATH_EXPR_VAL | Validate the expression for the formula.                                                         |
| <a href="#">Sales Order Price Rule Usage Page</a> | OM_SORULE_USAGE    | Review price rule usage information.                                                             |

### Conditions Page

Use the Conditions page (EOEP\_CONDITION) to set up pricing rule conditions for each transaction.

Navigation:

**Pricing Configuration**, and then **Create Pricing Information**, and then **Price Rules Maintenance**

This example illustrates the fields and controls on the Conditions page (1 of 2). You can find definitions for the fields and controls later on this page.

Conditions
Formulas

Price Rule

| Transaction | Price Rule | Short Description | SetID |
|-------------|------------|-------------------|-------|
| Sales Order | CSS_01     | CSS_01            | SHARE |

Mode:  
Advanced
Change to Basic mode
Price Rule Usage
Save Price Rule As...

Rule Attributes

\*Status
Inactive

Description
CSS\_01

\*Short Description
CSS\_01

Also Used by Transaction:

☒ Buying Agreement
☒ Customer Returns
☒ Price Book
☒ Sales Order Batch

Rule Conditions
Personalize | Find | | 
First 1-2 of 2 Last

| Field Name       | Identifier | Search | Match these Values                |
|------------------|------------|--------|-----------------------------------|
| Sold To Customer | USA01      |        | New World Outdoor Equipment, Inc. |
| Product ID       | 10012      |        | Pro5500 Road Helmet               |

This example illustrates the fields and controls on the Conditions page (2 of 2). You can find definitions for the fields and controls later on this page.

Combined Conditions
Personalize | Find | | 
First 1-3 of 3 Last

| Select                   | Match these Values                                                                |
|--------------------------|-----------------------------------------------------------------------------------|
| <input type="checkbox"/> | Sold To Customer is equal to any in the list<br>New World Outdoor Equipment, Inc. |
| <input type="checkbox"/> | Product ID is equal to any in the list<br>Pro5500 Road Helmet                     |
| <input type="checkbox"/> | Product ID is equal to any in the list                                            |

And/Or
Build Rule Definition

Rule Definition

The transaction contains the following:  
Product ID is equal to any in the list  
Pro5500 Road Helmet  
AND  
Sold To Customer is equal to any in the list  
New World Outdoor Equipment, Inc.

| Field or Control                                        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Mode</b>                                             | <p>Use to determine the data entry method.</p> <p><i>Basic:</i> Enables you to search for values for the field names that you select. The Match These Values column is populated with the description of the values that you selected after you made the selection. Rule conditions are automatically joined with the AND conditional operator.</p> <p><i>Advanced:</i> Basic mode plus additional data entry features. Enables you to manually enter values for the identifiers or search for identifiers. If you add them manually, separate the values by a comma without a space between the values. The Match These Values column is populated with the description of the identifiers that you enter.</p> <p>The <b>Combined Conditions</b> grid is available and automatically populated with the basic field name and value rule conditions. The <b>Combined Conditions</b> grid enables you to create rule conditions that are combined into more complex conditions. You can use logical AND and OR operators.</p> <p>This is the default mode.</p> <p><b>Note:</b> Rule conditions in advanced mode are not automatically linked by the AND operator. If you do not specifically select AND to link two conditions, the system will match the last entered condition.</p> |
| <b>Change to Advanced mode and Change to Basic mode</b> | Use to change the mode.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Save Price Rule As</b>                               | Click this button to save the price rule to a new price rule.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

## Price Rule Usage

Click to view usage information.

## Rule Attributes

| Field or Control   | Description                                                                                                                                                                                                                                                                                                                                                                     |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Transaction</b> | <p>Select a value from the available options to create a new price rule and populate the list of values for the field names.</p> <p>This field is only visible in add mode. Once the rule is created for a transaction, you cannot change the transaction.</p> <p><b>Note:</b> In PeopleSoft CRM installations, this field appears by default and is unavailable for entry.</p> |

| Field or Control                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Status</b>                   | <p>Select from these values:</p> <p><i>Deployed:</i> Activates the price rule so that it is used to determine price adjustments. You must enter data on the Formulas page before you can save the price rule in this status. You can also use the simulator to test price scenarios in this status.</p> <p><i>Inactive:</i> The price rule is not active. The rule is not available for any price calculations. Use to inactivate a rule that was previously in use.</p> <p><i>Pending:</i> This status appears by default. You can save the price rule in this status without adding data on the Formulas page. Use this status when you want to save the price rule, but you don't want the system to process any edits on the rule. You cannot use a rule in this status in the simulator, and price rule validation is not performed when you save the rule.</p> <p><i>Ready to Test:</i> Use this status to test the rule with the simulator, but the rule is not available for use in price calculations.</p> |
| <b>Description</b>              | Enter a description of the rule.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Field or Control                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Short Description</b>        | Enter a short description of the rule. The first 20 characters of the description appear by default. This field is used as the label on pages and inquiries.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Also Used by Transaction</b> | The <b>Also Used by Transaction</b> is used to select child applications the price rule can be applied to, if the transaction has child applications that use its pricing data.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Rule Conditions</b>          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Field or Control                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Error</b>                    | If an error exists in the price rule definition, a red square box appears in this column. Correct the error. This field only appears if an error exists. Position the mouse cursor on top of the red square to view a detailed description of the error.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Field Name</b>               | Select the price-by field to use with the rule condition. The valid list of price-by fields is established on the Transaction Price By Keys page by the Enterprise Pricer system administrator. The list of fields that is available when you create the price rule is determined by the transaction.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Identifier</b>               | Enter values for the price-by fields; use a comma to separate multiple values. This option is available only in Advanced mode.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

| Field or Control          | Description                                                                                                                                                                                                                                                     |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Search Push Button</b> | Click to search for valid price-by field values.<br><b>Note:</b> If you have previously selected values, those values remain selected. You can restrict the search further by entering the appropriate ID and description values at the top of the search page. |

### Combined Conditions

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

| Field or Control             | Description                                                                                                                                                                                                                                                |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>And/Or</b>                | Select either operator to combine the selected conditions. This option is available if you are using advanced mode.<br><b>Note:</b> In basic mode, the system automatically uses only the AND operator.                                                    |
| <b>Build Rule Definition</b> | After selecting the conditions to use and the conditional operator, click this button to build the rule definition. The new condition is added to the <b>Combined Conditions</b> grid, and the definition appears in the <b>Rule Definition</b> group box. |

### Rule Definition

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

## Formulas Page

Use the Formulas page (EOEP\_FORMULA) to set up price rule formulas (the actions that take place when the price rule conditions are met).

Navigation:

**Pricing Configuration**, and then **Create Pricing Information**, and then **Price Rules Maintenance**

This example illustrates the fields and controls on the Formulas page (1 of 2). You can find definitions for the fields and controls later on this page.

Conditions Formulas

Price Rule

| Transaction | Price Rule | Short Description | SetID |
|-------------|------------|-------------------|-------|
| Sales Order | CSS_01     | CSS_01            | SHARE |

Mode: Advanced      Change to Basic mode      Price Rule Usage      Save Price Rule As...

▼ Rule Attributes

Price Action Type: Discount/Surcharge

Cascading/Summed: Cascading

Promotion Code:

Merchandising Type:

\*Period-to-Date: No

One-Time Only: No

Rollup Exclude: None

Rollup By: Transaction

Rounding Rule ID:

Maximum Quantity:

☐ Use Grace Days

☐ Exclusive Pricing Only

☐ Stop Processing Here

☐ Mutually Exclusive

☒ Applicable to List Price

☐ Applicable to Buying Agreement

☐ Applicable to Cost Base

☐ Applicable to Alter Cost Base

☐ Tiered Pricing

☐ Rollup By UOM For:  UOM:

▼ Date Range      Personalize |  First 1-3 of 3 Last

| ID | *Pricing Date | *Start Date | *End Date  |
|----|---------------|-------------|------------|
| 1  | Price Date    | 01/01/2001  | 01/01/2030 |
| 2  | Price Date    | 01/01/2001  | 01/01/2030 |
| 3  | Price Date    | 01/01/2001  | 01/01/2030 |

▼ Formula Range      Personalize |  First 1-3 of 3 Last

| ID | *Price Type | Minimum Amount | Maximum Amount |
|----|-------------|----------------|----------------|
| 1  | Quantity    | 1.0000         | 500.0000       |
| 2  | Quantity    | 501.0000       | 1000.0000      |
| 3  | Quantity    | 1001.0000      | 9999999.0000   |

This example illustrates the fields and controls on the Formulas page (2 of 2). You can find definitions for the fields and controls later on this page.

Price Formulas      Personalize | Find |  First 1-3 of 3 Last

Formula Definition      Terms and Adjustment type      Break Description     

| Date Range IDs | Formula Range IDs | UOM | Currency | Discount / Surcharge By | Amount / Percentage |
|----------------|-------------------|-----|----------|-------------------------|---------------------|
| 1              | 1                 | EA  |          | Percentage              | -5.0000             |
| 2              | 2                 | EA  |          | Percentage              | -10.0000            |
| 3              | 3                 | EA  |          | Percentage              | -20.0000            |

▼ Account Distribution Codes      Personalize | Find |  First 1 of 1 Last

| Business Unit | Adjustment Type | Discount Distribution Code | Discount Dist Percentage | Surcharge Distribution Code | Surcharge Dist Percentage |
|---------------|-----------------|----------------------------|--------------------------|-----------------------------|---------------------------|
|               |                 |                            |                          |                             |                           |

▼ Price List      Personalize | Find | View All |  First 1 of 1 Last

| Price List ID | Currency Code | Description |
|---------------|---------------|-------------|
|               |               |             |

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

See [Price Transaction Code Page](#).

The price action type that is selected determines the additional data that is required for the price formula. Each formula requires start and end dates and high and low quantities. You must create at least one date range and formula range. Date range IDs and formula range IDs on each formula must point to a valid date and formula range.

To apply the formula, the transaction must match all the date ranges identified by date range IDs and all of the formula ranges identified by formula range IDs. For example, date range IDs 1,2,3 means the formula must match date range conditions 1, AND 2, AND 3. The same is true for formula ranges: to apply the formula, the transaction must match all of the formula ranges identified by formula range IDs. For example, formula range IDs 1,2,3 means the formula must

match formula range conditions 1, AND 2, AND 3. To see a text description of the rule formula, click the Break Description tab.

## Rule Attributes

| Field or Control  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Price Action Type | <p>Define the function of the price rule when it is applied to a transaction. This field is required. Values vary for each transaction:</p> <p><i>Discount/Surcharge:</i> Apply a discount or surcharge to the line.</p> <p><i>Min/Max Margin:</i> Perform a margin check. If a line falls outside one of the minimum/maximum margin rules, Enterprise Pricer will return the match to the transaction. Each transaction will take proper action. For order management, the schedule is put on hold. The margin is calculated in this way:</p> $\text{Margin} = \text{Net Price} - \text{Product Cost}$ $\text{Margin Percentage} = (\text{Net Price} - \text{Product Cost}) / \text{Net Price} * 100$ <p>If Net Price = 0, then the Margin Percentage is 0. To calculate the margin, Transaction Pricer passes the Product Cost even when Cost Plus Pricing is not used.</p> <p><b>Note:</b> If indicated at the formula level by the <b>Margin Base</b> field, Alternate Cost is used in place of Product Cost to calculate the margin.</p> <p><i>Min/Max Target Discount</i> (minimum/maximum target discount): Compare the discount adjustment and apply a target adjustment so that the overall discount falls in the minimum and maximum target discount range.</p> <p><i>Min/Max Target Price</i> (minimum/maximum target price): Compare the net price and apply an adjustment to bring the price within the minimum and maximum prices specified.</p> <p><b>Note:</b> Use the target price action types to compare the adjustments and ensure that the adjustments are correct. For example, if you define a maximum target discount for a product as 25 percent, then the system applies discounts to the base price up to that 25 percent maximum. If you define a minimum surcharge for a product as 5 percent, then the system always applies a 5 percent surcharge. If you define a minimum target price for a product as 50 USD, then the system applies adjustments to the base price, but it does not discount the price below 50 USD.</p> <p><i>Min/Max Target Surcharge</i> (minimum/maximum target surcharge): Compare the surcharge adjustment and apply the adjustment such that the surcharge falls within the minimum and maximum target surcharge specified.</p> <p><i>Price List Only Condition:</i> Create a condition-only price rule to select the price lists.</p> |

| Field or Control    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                     | <p><i>Price Override:</i> Apply a new price to replace the existing price.</p> <p><b>Note:</b> If the price rule is defined only for product ID, you should use the Price List feature to define the base price for the product.</p> <p><i>Pricing Base:</i> Specify a pricing base for transaction lines that match this rule. The pricing base type is specified by the <b>Pricing Base</b> field.</p> <p><i>Product Add:</i> Add additional products field or a specified price.</p> <p><b>Note:</b> Product adds were previously referred to as <i>giveaways</i>. For giveaway products, you can use the product list price to calculate the net price.</p> <p><i>Rollup Only Rule:</i> Create rollups that are independent of conditions of the adjustment (for example, Discount/Surcharge) price rule to select adjustment formulas.</p> <p><i>Total Order Discount/Surcharge:</i> Apply a discount or surcharge to the entire order.</p> |
| <b>Pricing Base</b> | <p>Select the base or the starting point for the pricing calculation.</p> <p><i>Alternate Cost:</i> The alternate cost of the product is used as the base for pricing calculations. Alternate cost is a different cost than product cost. For example, in PeopleSoft Order Management, the alternate cost is the product cost with an Alternate Cost Adjustment Factor applied to it.</p> <p><i>Cost:</i> Use the product cost as the base for pricing calculations.</p> <p><i>List Price:</i> Use the product list price as the base for pricing calculations.</p>                                                                                                                                                                                                                                                                                                                                                                              |

| Field or Control        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Cascading/Summed</b> | <p>Select the method for applying the adjustment for the <i>Discount/Surcharge</i> and <i>Product Add</i> price action types.</p> <p><i>Cascading:</i> Applied as they are found. A second discount is applied to the previously discounted price, a third discount is applied to a price that is already discounted twice, and so on. For example, if the system encounters two discounts, such as 10 percent and 20 percent off the list price of 100 USD, then the system applies the discounts in this way: 10 percent off of 100 USD and 20 percent off of 90 USD. Thus, the unit price for the order schedule line is 72 USD.</p> <p><i>Summed:</i> When the system finds multiple discounts, it adds them together and applies the discount once. Thus, for the summed example, the system applies discounts in this way: the 10 percent and 20 percent discounts are combined for 30 percent off of 100 USD. The unit price for the order schedule line is 70 USD. The summed adjustments are applied to the net price with cascading adjustments already applied.</p> |
| <b>Period-to-Date</b>   | <p>Select to include period-to-date totals in the adjustment. The system applies adjustments based on purchases within a determined period. Each order is considered in the adjustment based on the date of the order. Past orders are used to compare the price and quantity ranges of the formula on the price rule.</p> <p><b>Note:</b> PeopleSoft CRM applications do not use this option.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Use Net Price</b>    | <p>Select to use net price instead of base price from the orders considered in the period-to-date calculation.</p> <p>The <b>Use Net Price</b> will be available only if Price Action Type value is <i>Discount/Surcharge</i>, <i>Price Override</i>, <i>Product Add</i>, or <i>Total Order Discount/Surcharge</i>, and Period-to-Date value is either <i>By Customer</i> or <i>By Rule</i>.</p> <p>Tiered Pricing will be hidden if the <b>Use Net Price</b> option is selected. Tiered pricing uses base price to calculate the tiers.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>One-Time Only</b>    | <p>Select to limit the rule applicability. Typically used for price discounts that are so good they are not allowed on multiple orders. Effective for encouraging large first orders instead of many smaller orders.</p> <p><i>Per Customer:</i> Rule is used one time per customer.</p> <p><i>Per Rule:</i> Rule is used one time.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

| Field or Control        | Description                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Rollup Exclude</b>   | <p>Indicate whether to include Known Value Items (KVI) or Non-Discountable Products (NDP) in the total to select formulas.</p> <p><i>KVI &amp; NDP Products:</i> Do not include KVI and NDP.</p> <p><i>KVI Products:</i> Do not include KVI.</p> <p><i>NDP Products:</i> Do not include NDP.</p> <p><i>None:</i> Include all products.</p>                                                                                           |
| <b>Rollup By</b>        | <p>Identify the manner in which rollup (totals to select price formulas) is calculated. The options are:</p> <p><i>Line:</i> Rollup is calculated by order lines.</p> <p><i>Rule:</i> Rollup is calculated by a rollup-only price rule.</p> <p><i>Schedule:</i> Rollup is calculated by order schedule.</p> <p><i>Transaction:</i> Rollup is calculated by transaction, from all order schedules that match the same price rule.</p> |
| <b>Rollup Rule ID</b>   | <p>Enter the rule whose rollup is used to select the matching price formula for the current price rule.</p>                                                                                                                                                                                                                                                                                                                          |
| <b>Rounding Rule ID</b> | <p>Identify a specific rounding rule to use when determining values such as net price and adjustments.</p>                                                                                                                                                                                                                                                                                                                           |
| <b>For</b>              | <p>Define which calculations should have a rounding rule applied to them before arriving at a final value. Values are:</p> <p><i>Adjustment:</i> Round each adjustment.</p> <p><i>Both:</i> Round both adjustments and the net price.</p> <p><i>Net Price:</i> Round only the net price.</p> <p><i>None:</i> Do not round adjustments or the net price.</p>                                                                          |
| <b>Maximum Quantity</b> | <p>Define the maximum quantity of items to which this price rule can apply. This setting enables you to introduce a new product to the market at a discounted price for a limited quantity.</p>                                                                                                                                                                                                                                      |
| <b>UOM</b>              | <p>Define the unit of measure for the maximum quantity of items to which this price rule can apply.</p>                                                                                                                                                                                                                                                                                                                              |
| <b>Use Grace Days</b>   | <p>Select to have the system use the grace days that are assigned to the customer when determining which price formulas are applied to the price. You can assign a grace period (in days) for each customer. Grace days are added to the ending date of the formula.</p> <p><b>Note:</b> PeopleSoft CRM applications do not use this option.</p>                                                                                     |

| Field or Control                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Exclusive Pricing Only</b>   | <p>In PeopleSoft Order Management, you can set up a special arbitration plan called an Exclusive Pricing ID. This arbitration plan must specify at least one price rule by name. When this exclusive pricing ID is used in a sales order, the matching arbitration plan is used first. If no adjustments are applied after the exclusive pricing ID arbitration plan is applied, then the regular arbitration plan is used. By selecting the <b>Exclusive Pricing Only</b> option on the price rule, you specify that this price rule is used only when the exclusive pricing arbitration plan is used.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Stop Processing Here</b>     | <p>Select to prevent the system from applying further price adjustments when the system finds a match with a price rule. This event can occur for total order or line adjustments. The system stops applying price adjustments after encountering the first price rule match that has this option selected.</p> <p><b>Note:</b> This option applies only for price adjustments. It does not apply for price lists that are associated with price rules. The stop processing option is handled separately for total order and line adjustments.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Mutually Exclusive</b>       | <p>When the <b>Mutually Exclusive</b> check box is selected, if the price rule is found to match the order during arbitration, then that rule is the only rule applied to the entire sales order; no other discounts or surcharges apply to the order. Typically, this option is used for discounts that are so good that no other discounts are allowed in conjunction with the discount provided by this rule. An example of a mutually exclusive price rule is "Spend 10,000 USD or more and get 25 percent off the order. No other discounts allowed."</p> <p>If more than one mutually exclusive price rule is matched, only the first (use the arbitration plan to specify the order) mutually exclusive price rule is applied. All other price rules are ignored, including the normal price rule that is sorted before the applied mutually exclusive rule. The process for these price rule is processed separately for order and line/schedule adjustments, similar to the current process for the Stop flag on the rule. Each order can have only one mutually exclusive price rule, and one per schedule. Because a mutually exclusive price rule excludes other regular rules, the Stop flags on those price rules do not stop the mutually exclusive price rules from being applied.</p> |
| <b>Applicable to List Price</b> | <p>When selected, indicates that the price rule is applicable when list price is the base for pricing calculations.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

| Field or Control                      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Applicable to Buying Agreement</b> | When selected, indicates that the price rule is applicable when a buying agreement is the base for pricing calculations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Applicable to Cost Base</b>        | When selected, indicates that the price rule is applied when cost is the base for pricing calculations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Applicable to Alter Cost Base</b>  | When selected, indicates that the price rule is applicable when alternate cost is the base.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Tiered Pricing</b>                 | When selected, tiered pricing is performed for the price rule. This selection allows different adjustments for products in the same transaction line. Pricing schedules are created to identify the quantities of each adjustment (formula).                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Increment</b>                      | Identify the increment unit of the tiers. This value should match the increment of how the product is ordered (in pricing UOM). The usual value for quantity is 1. The minimum and maximum values for the formula ranges must be multiples of the increment value. For example, if the increment is 5, you can set up the formula ranges as 0–10, 15–25, 30–100, and so forth. If the ordered quantity is 27, the first 10 will match the formula range of 0–10. The next 15 will match the formula range 15–25. The last 2 do not match any formula range and will have no adjustment applied.<br><b>Note:</b> Make sure you test the tiers before you deploy the price rule. |
| <b>Rollup By UOM</b>                  | When selected, indicates that the rollup is based on the unit of measure.<br><b>Note:</b> In earlier Enterprise Pricer versions, <b>Rollup By UOM</b> is automatically used if one of the pricing keys used in the price rule is product or product group. Now, <b>Rollup by UOM</b> is optional.                                                                                                                                                                                                                                                                                                                                                                              |

### Formula Range

| Field or Control  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Price Type</b> | Select the price type for the defined formula range. The options are:<br><i>Quantity:</i> Indicates the formula range pertains to the number of units of the item purchased in the minimum and maximum purchase ranges identified.<br><i>Price:</i> Indicates the formula range defined pertains to the order value of the item purchased in the minimum and maximum purchase ranges identified.<br><b>Note:</b> Weight and Volume are other options that are available. Which options are available depends on the transaction setup. |

| Field or Control      | Description                                                                                                                                                                                                            |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Minimum Amount</b> | The minimum amount, quantity or purchase total, for the specified formula range.                                                                                                                                       |
| <b>Maximum Amount</b> | The maximum amount, quantity or purchase total, for the specified formula range.<br>The system uses 9999999999 as the default in the <b>High Quantity</b> field for the last price formula if the field is left blank. |

### Price Formulas

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

| Field or Control             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Date Range IDs</b>        | Identify the date ranges the transaction must match to apply the formula. Separate multiple IDs by a comma (for example, 1,2,3).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Formula Range IDs</b>     | Identify the formula ranges the transaction must match to apply the formula. Separate multiple IDs by a comma (for example, 1,2,3). For tiered pricing rules, you can have only one formula range per formula.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Unit of Measure</b>       | The unit of measure required to apply the formula. If not provided, match all unit of measures.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Currency</b>              | The currency in which the price formula is measured. If not provided, apply to all currencies. Currency is required if the formula range is by price or adjustment is by amount.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Discount/Surcharge By</b> | <p><i>Amount</i>: Indicates that the adjustment is by amount.</p> <p><i>Amt &amp; Expr</i> (amount and expression): Indicates that the adjustment is a calculated value derived by the amount or an expression.</p> <p><i>Expression</i>: Indicates that the adjustment is derived from a specific expression.</p> <p><i>Ext Class</i> (external class): Indicates that the adjustment is derived from an external class.</p> <p><i>Pct &amp; Expr</i> (percent and expression): Indicates that the discount is a calculated value derived by a percent or an expression.</p> <p><i>Percentage</i>: Indicates that the adjustment is by percent.</p> <p><b>Note</b>: To indicate a discount, enter a negative value for the amount or percentage. A positive value indicates surcharge.</p> |
| <b>Margin By</b>             | <p><i>Amount</i>: Indicates that the margin matching is by amount.</p> <p><i>Percentage</i>: Indicates that margin matching is by percent.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

| Field or Control           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Target Discount By</b>  | <p><i>Amount:</i> Indicates that the target discount is matched by amount.</p> <p><i>Percentage:</i> Indicates that the target discount is matched by percent.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Target Price By</b>     | <p><i>Price:</i> Indicates that the target price is matched by item unit price.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Target Surcharge By</b> | <p><i>Amount:</i> Indicates that the target surcharge is matched by amount.</p> <p><i>Percentage:</i> Indicates that the target surcharge is matched by percentage.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Price Override By</b>   | <p><i>Expression:</i> Indicates that the price is derived from a specific expression.</p> <p><i>Ext Class</i> (external class): Indicates that the price is derived from an external class.</p> <p><i>Prc &amp; Expr</i> (price and expression): Indicates that the price is a calculated value derived by percent or an expression.</p> <p><i>Price:</i> Indicates item price is defined by the price in the Price field.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Product Add By</b>      | <p><i>BOGO</i> (buy-one-get-one): The factor by which the product is given away. Enterprise Pricer computes the quantity of the promoted item given away by summing the quantities from the order schedules that match the price rule, dividing them by the BOGO factor, and taking the whole number.</p> <p>For example, if you had a single formula range of Quantity 1–99999 for Product ID 10050 and the BOGO factor was set to 3, each unit of 10050 purchased in the order would receive 2 units of the item identified on the Product Detail page.</p> <p><i>BOGO &amp; Prc</i> (buy-one-get-one and price): In addition to specifying the BOGO factor to calculate the product adds quantity, specify the price of the product add using a mathematical expression.</p> <p><i>Qty &amp; Prc</i> (quantity and price): Specify the product add quantity and price.</p> <p><i>Qty Exp</i> (quantity and expression): Specify the calculation to use for the product add quantity in the <b>Expression</b> field.</p> <p><i>Quantity:</i> Indicates the product add quantity.</p> |

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

#### Formula Detail Tab

Select the Formula Detail tab.

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

| Field or Control                             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Product ID</b>                            | The product ID for the promoted item.                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>UOM Promo</b> (unit of measure promotion) | Select the UOM for the product that is given away.                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Product Add Type</b>                      | Specify whether you want the giveaway applied to each matched line of the transaction (sales order) or applied only once to the header of the transaction. This option applies only to the Product Add By types of <i>Qty Expr</i> , <i>Qty &amp; Adj</i> , and <i>Quantity</i> .<br><br><i>Per Line:</i> The system applies this giveaway to every line.<br><br><i>Per Order:</i> The system applies this giveaway only once to the entire sales order. |

#### Terms and Adjustment Type Tab

Select the Terms and Adjustments Type tab.

| Field or Control       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Terms</b>           | <p>Assign a payment term to the formula. If this formula is used when pricing the transaction, the system assigns the most favorable payment terms to the transaction.</p> <p><b>Note:</b> If you set up a price rule with payment terms as a key and you have a price formula with payment terms, the system might replace the payment terms on the sales order with the best payment terms from the price rule. You might not get the intended price adjustment if you reprice the order. If you do not want pricing to change, use the price protected option.</p> <p><b>Note:</b> PeopleSoft CRM does not use this option.</p> |
| <b>Adjustment Type</b> | <p>Specify an adjustment type. Values are:</p> <p><i>Bill Back:</i> An adjustment that is accrued instead of reducing the net unit price of the item on the invoice.</p> <p><b>Note:</b> This option does not appear in PeopleSoft CRM. PeopleSoft CRM uses off-invoice adjustments.</p> <p><i>Off-Invoice:</i> An adjustment that reduces the net unit price or, in the case of a total order adjustment, the price of the order.</p>                                                                                                                                                                                             |

### Account Distribution Codes

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

#### Note

PeopleSoft CRM does not use this option.

| Field or Control                                                  | Description                                                                                                                                                                                                                                                                                         |
|-------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Discount Distribution Code and Surcharge Distribution Code</b> | <p>These distribution codes, along with the associated amounts, are passed to PeopleSoft Billing Interface tables during the Populate Billing process.</p> <p>To use bill backs, enter both a discount and surcharge code. Off-invoice discounts or surcharges only require one of these codes.</p> |

| Field or Control                                                                                                                            | Description                                                                                   |
|---------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| <b>Discount Dist Percentage</b> (discount distribution percentage) and <b>Surcharge Dist Percentage</b> (surcharge distribution percentage) | The sum of the percentages must equal 100 percent for each business unit and adjustment type. |

## Expression Validator Page

Use the Expression Validator page (EOEP\_MATH\_EXPR\_VAL) to validate the expression for the formula.

Navigation:

Enter an expression for the price formula.

Click the **Calculator** button next to the **Expression** field.

| Field or Control            | Description                                                                                                                                            |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Math Expression</b>      | View the mathematical expression entered in the <b>Expression</b> field on the Price Rule Conditions page.                                             |
| <b>Variable Name</b>        | Display the names of the variables that are set up for the transaction. Math expression can use only the names in the list.                            |
| <b>Test Value</b>           | Enter a test value to use to evaluate the expression.                                                                                                  |
| <b>Result of Evaluation</b> | After you click the <b>Evaluate with Test Values</b> button, the calculated result of the expression appears in the <b>Result of Evaluation</b> field. |

## Sales Order Price Rule Usage Page

Use the Sales Order Price Rule Usage page (OM\_SORULE\_USAGE) to review price rule usage information.

Navigation:

Click the **Price Rule Usage** button on the Conditions page.

This example illustrates the fields and controls on the Sales Order Price Rule Usage page. You can find definitions for the fields and controls later on this page.

## Price Rule Usage

## Sales Order Price Rule Usage

|                  |        |                                                                            |                      |      |         |
|------------------|--------|----------------------------------------------------------------------------|----------------------|------|---------|
| Transaction      | SO     | SetID                                                                      | SHARE                | Rule | CPBPR01 |
| Customer Count   | 0      | Business Unit                                                              | <input type="text"/> |      |         |
| Order Count      | 0      | Order No                                                                   | <input type="text"/> |      |         |
| Schedule Count   | 0      | Sold To Customer                                                           | <input type="text"/> |      |         |
| Total Adjustment | 0.0000 | <input type="button" value="Search"/> <input type="button" value="Clear"/> |                      |      |         |
| Maximum Quantity | 0.0000 |                                                                            |                      |      |         |

## Rule Usage Details

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

| Customer | Business Unit | Order No | Order Line | Schedule | Price Schedule | Formula ID | Adjustment Flag | Amount, Percentage, or Price | Calculated Adjustment Amount | Currency Code |
|----------|---------------|----------|------------|----------|----------------|------------|-----------------|------------------------------|------------------------------|---------------|
|          |               |          |            |          |                |            |                 |                              |                              |               |

## Rule Usage Summary

| Field or Control        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Customer Count</b>   | The number of customers that have made use of this rule.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Order Count</b>      | The number of orders this rule has applied to thus far.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Schedule Count</b>   | <p>The number of schedules this rule has applied to thus far.</p> <p>The price rule usage is updated as order schedules are processed for the order. Therefore, previous schedules will reduce the available quantity for the later schedules in the same order. This process is similar to the PTD process. To avoid conflicts with other orders that are applied by the same price rule, the price rule usage data is retrieved before each pricing calculation.</p> <p>Because tiered pricing breaks the schedule quantity into pricing schedules, the usage for those price rules is calculated by summing the quantities from matching formulas for the same rule. For non-tiered pricing, multiple formulas for the same price rule can apply to the schedule, for all the products in the same schedule. To calculate the usage for these rules, Enterprise Pricer uses the applied quantity from one of the formulas.</p> |
| <b>Total Adjustment</b> | The total adjustment value thus far for this rule.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Maximum Quantity</b> | The number of product units sold referencing this price rule. This information is relevant for rules that identify a maximum quantity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

## Rule Usage

| Field or Control             | Description                                                                                                                                                                                                                                                            |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Detail Tab</b>            | Provides a customer-specific summary of price rule usage for the selected rule, including details such as order number, order lines, schedule, price schedule, formula ID, adjustment flag, amount, percentage or price, applied adjustment amount, and currency code. |
| <b>Additional Detail Tab</b> | View the date and time stamp for each instance when the price rule was used for a given customer.                                                                                                                                                                      |

## Setting Up Rounding Rules

This section discusses how to define rounding rules.

### Page Used to Set Up Rounding Rules

| Page Name                                | Definition Name | Usage                                                                                                                                     |
|------------------------------------------|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Price Rounding Rule Page</a> | EOEP_ROUND_RULE | Define rounding rules (the decimal points to round the adjustments and net price based on the base price during the pricing calculation). |

### Price Rounding Rule Page

Use the Price Rounding Rule page (EOEP\_ROUND\_RULE) to define rounding rules (the decimal points to round the adjustments and net price based on the base price during the pricing calculation).

Navigation:

**Pricing Configuration**, and then **Create Pricing Information**, and then **Price Rounding Rule**

This example illustrates the fields and controls on the Price Rounding Rule page. You can find definitions for the fields and controls later on this page.

Price Rounding Rule

Transactions to be Priced

| Transaction | Description |
|-------------|-------------|
| SO          | Sales Order |

Rounding Rule

Find | View All First 1 of 1 Last

\*Rounding Rule ID

Description

\*Short Description

Rounding Rule Breaks

Personalize | Find | View All

First 1 of 1 Last

| Range ID | Minimum Price | *Maximum Price  | *Rounding Position |
|----------|---------------|-----------------|--------------------|
|          | 0.0000        | 9999999999.9999 | By Currency        |

| Field or Control                | Description                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Rounding Rule ID                | Enter an ID for the rule. You must also add a short description.                                                                                                                                                                                                                                                                                                                                     |
| Minimum Price and Maximum Price | Use to establish different rounding levels by price. Levels can not overlap.                                                                                                                                                                                                                                                                                                                         |
| Rounding Position               | Select to establish how you want rounding to take place.<br><i>By Currency:</i> The defines the decimal precision for the currency code of the transaction. This option is the default.<br><i>By Decimal Point:</i> Select this option to round to a specific decimal position. If you select this option, you also must select a decimal position. Values for decimal position are between 0 and 4. |

# 7

## Using the Arbitration Plan

### Understanding Arbitration Plans

This section discusses:

- Arbitration plans in PeopleSoft Supply Chain Management (PeopleSoft SCM).
- Basic arbitration plans.
- Complex arbitration plans.
- Special price action types.

### Arbitration Plans in PeopleSoft SCM

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

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

#### Note

In PeopleSoft SCM, the system assigns the arbitration plan to the sold to customer and customer group. The arbitration plan appears by default on the sales order in this sequence: sold to customer, customer group, and default that is defined for the transaction.

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

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

#### Related Topics

- [Understanding Enterprise Pricer Implementation](#)

### Basic Arbitration Plans

You can use the arbitration plan to filter the price rules that are applied to the transaction. The definition of the arbitration plan nodes and the placement of the decision nodes determine the

filtering power of the arbitration plan. To verify that the arbitration plan is performing as you expect, use the pricing simulator to test the arbitration plan and price rules.

### Arbitration Plans That Address Discounts Only

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

This example illustrates the fields and controls on the Example of the Arbitration Tree section of the Arbitration page showing Highest Discount First.

The screenshot shows the 'Arbitration Tree' configuration interface. On the left, a tree view displays 'Highest Discount First'. On the right, the 'Selection Detail' panel contains the following fields:

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

If you are certain that price rules are defined only for discounts and not for price overrides or giveaways, then you can define the arbitration plan this simply. However, if your price rules are more complex, then you will need a more complex arbitration plan.

### Arbitration Plans That Apply Highest/Lowest Discount Only and Then Stop

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

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

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

The following example defines an Arbitration Plan that limits the applied adjustments and then stops the arbitration process:

This example illustrates the fields and controls on the Example of the Arbitration Tree section of the Arbitration page showing Highest Discount First and Stop.

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

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

## Complex Arbitration Plans

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

### Surcharge and Discount Arbitration Plan Criteria

The following diagram shows an example in which the system selects all price rules with conditions that match the transaction and sorts them first by surcharges and then by discounts. If there are multiple surcharges, the lowest surcharge is applied first. Discounts are applied after all the surcharges are applied (highest discount first).

This example illustrates the fields and controls on the Example of the Arbitration Tree section of the Arbitration page sorted by Surcharges and then Discounts.

The screenshot shows the 'Arbitration Tree' window with a more complex structure. The tree view on the left contains the following folders:

- Surcharge
  - Lowest Surcharge First
- Discount
  - Highest Discount First

The 'Selection Detail' panel on the right is identical to the previous screenshot, with the following fields:

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

The arbitration plan also can act as a filter to apply certain price rules and not others to a transaction. Although some price rules might match the transaction according to the conditions of the price rule, you can define the arbitration plan to bypass some price rules. This example is also a filter because it applies only surcharges and discounts to the transaction. If giveaway or price override price rules are defined that match the transaction, they are not applied when using this arbitration plan.

### Arbitration Plans That Apply Giveaway and Price Override Rules

This example defines an arbitration plan with giveaway and price override rules:

This example illustrates the fields and controls on the Example of the Arbitration Tree section of the Arbitration page showing Product Adds.

The screenshot shows the 'Arbitration Tree' window. On the left, a tree structure lists nodes: Price Override, Lowest Price Override First, Surcharge, Lowest Surcharge First, Discount, Highest Discount First, and Product Add (highlighted). On the right, the 'Selection Detail' panel shows 'Arbitration Type' set to 'Action Type' and 'Price Action Type' set to 'Product Add'. An 'Update Tree' button is visible below these settings.

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

For example, you want to define an arbitration plan that selects only discount price rules that match certain fields in a transaction. In this case, you define the order in which the matching price rules are applied to the transaction. In the following example, you want to match price rules defined only by sold-to customer, product, and region code. After the system finds the matching price rules, it first applies those rules that match all three criteria, then it applies the rules that match only the product, and then it applies any discounts defined for favorite customers.

This example shows a filter arbitration plan. A filter arbitration plan does not have a decision point at the top level of the tree.

This example illustrates the fields and controls on the Example of the Arbitration Tree section of the Arbitration page showing Filtering.

The screenshot shows the 'Arbitration Tree' window. On the left, a tree structure lists nodes: Sold To, Product, Region (highlighted), Sold To Customer, Product ID, Region Code, Discount, Highest Discount First, Product, Product ID, Discount, Highest Discount First, Sold To, Sold To Customer, Discount, and Highest Discount First. On the right, the 'Selection Detail' panel shows 'Arbitration Type' set to 'Pricing Key' and 'Description' set to 'Sold To, Product, Region'. Below this, the 'Pricing Keys' section lists 'Sold To Customer', 'Product ID', and 'Region Code' with dropdown menus and '+' and '-' buttons. An 'Update Tree' button is visible below these settings.

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

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

#### Note

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

### Rounding Rule Arbitration Plan Criteria

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

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

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

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

#### Note

The rounding rule and rounding flag in the price rule always override the rounding rule and rounding flag specified in the arbitration plan. For example, if the arbitration plan rounding flag is set to use rounding rule 3, which rounds everything to three decimal points, but the price rule rounding flag is set to None, then the price and adjustments are not rounded when the price rule is used. The rounding rule and flag defined in the arbitration plan are ignored and the rounding rule specified in the price rule is used. If neither the arbitration plan or the price rule specifies a rounding rule, then the application default rounding is applied. In the case of PeopleSoft Order Management, default rounding rounds the amount to four decimal places.

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

## Different Pricing Base Arbitration Plan Criteria

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

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

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

This example shows the first top-level node in the arbitration plan indicating that the system should use the highest base for pricing calculations:

This example illustrates the fields and controls on the Example of the Arbitration Tree section of the Arbitration page showing Base for Pricing Calculations.

The screenshot displays the 'Arbitration Tree' interface. On the left, a tree view shows a folder 'Pricing Base' containing a node 'Use Highest Base'. On the right, the 'Selection Detail' panel contains the following fields:

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

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

## Mutually Exclusive Price Rules Arbitration Plan Criteria

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

### Note

Since mutually exclusive price rules exclude other regular rules; the Stop flags on those price rules do not stop the mutually exclusive price rules from being applied. At most, one mutually exclusive price rule per order and one per schedule is present.

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

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

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

This example illustrates the fields and controls on the Example of the Arbitration Tree section of the Arbitration page showing Mutually Exclusive Branching.

The screenshot displays the 'Arbitration Tree' configuration window. On the left, a tree view shows the hierarchy: 'Pricing Base' (selected) contains 'Use Highest Base', 'Mutually Exclusive', 'Highest Discount First', 'Regular', and another 'Highest Discount First'. On the right, the 'Selection Detail' panel shows 'Arbitration Type' set to 'Price Rule Type' and 'Rule Type' set to 'Pricing Base'. An 'Update Tree' button is located below these settings.

### Apply Only "X" Number of Discounts Arbitration Plan Criteria

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

#### Note

This option is only available for the Decision arbitration type.

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

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

The following example shows an arbitration tree for which the number of discounts to be applied is specified rather than allowing the system to apply all the discounts found by the arbitration plan:

This example illustrates the fields and controls on the Example of the Arbitration Tree section of the Arbitration page showing X Number of Discounts.

The screenshot shows the 'Arbitration Tree' configuration window. On the left, a tree view lists categories: Pricing Base, Use Highest Base, Mutually Exclusive, Highest Discount First, Regular, and Highest Discount First. The 'Highest Discount First' option under the second 'Highest Discount First' category is selected. On the right, the 'Selection Detail' panel contains the following settings:

- Arbitration Type: Decision
- Decision: Highest Discount First
- Apply Only: 3
- Stop Processing: Yes
- Update Tree button

### Best Discount/Price Arbitration Plan Criteria

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

This is the process for building arbitration plans:

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

The following example shows an arbitration tree for which the best price for the customer at the point of calculation is selected using a decision point called *Lowest Price First*:

This example illustrates the fields and controls on the Example of the Arbitration Tree section of the Arbitration page showing Lowest Price.

The screenshot shows the 'Arbitration Tree' configuration window. On the left, a tree view lists categories: Pricing Base, Use Highest Base, Mutually Exclusive, Highest Discount First, Regular, and Lowest Price First. The 'Lowest Price First' option under the 'Regular' category is selected. On the right, the 'Selection Detail' panel contains the following settings:

- Arbitration Type: Decision
- Decision: Lowest Price First
- Apply Only: 1
- Stop Processing: Yes
- Update Tree button

### Trade Promotion Only Arbitration Plan Criteria

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

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

This is the process for building arbitration plans:

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

The following example shows an arbitration tree for which matching promotional price rules are used and all regular price rules are ignored:

This example illustrates the fields and controls on the Example of the Arbitration Tree section of the Arbitration page showing Promotions Only.

The screenshot displays the 'Arbitration Tree' configuration window. On the left, a tree view shows 'Promotion Management' expanded, with 'Highest Discount First' selected. The right pane, 'Selection Detail', contains the following settings:

- Arbitration Type: Decision (dropdown)
- Decision: Highest Discount First (dropdown)
- Apply Only: 1 (text input)
- Stop Processing: Yes (dropdown)

An 'Update Tree' button is located at the bottom of the Selection Detail pane.

## Special Price Action Types

Placement of certain price action types in the arbitration tree will not affect the order in which the adjustment is applied to the transaction, but it might affect the **Stop Processing Here** option selected in the price rule. These price action types are:

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

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

**Note**

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

# Setting Up an Arbitration Plan

This section discusses how to set up an arbitration plan.

## Page Used to Set Up Arbitration Plans

| Page Name                             | Definition Name | Usage                                                                              |
|---------------------------------------|-----------------|------------------------------------------------------------------------------------|
| <a href="#">Arbitration Plan Page</a> | EOEP_ARB_PLAN   | Define how price rules apply to the base or list price when pricing a transaction. |

## Arbitration Plan Page

Use the Arbitration Plan page (EOEP\_ARB\_PLAN) to define how price rules apply to the base or list price when pricing a transaction.

Navigation:

**Pricing Configuration**, and then **Create Pricing Information**, and then **Create Arbitration Plan**

This example illustrates the fields and controls on the Arbitration Plan page. You can find definitions for the fields and controls later on this page.

Arbitration Plan

| Arbitration Plan | Transaction | Description | SetID |
|------------------|-------------|-------------|-------|
| DEFAULT          | SO          | Sales Order | SHARE |

\*Description

Default Price Rule

Price Date

Order Date

☒ Default

Arbitration Tree

Sequence 1

- Payment Terms ID
- Extended Price
  - Price Override
    - Rule Name in Ascending Order
  - Cascading
    - Rule Name in Ascending Order
  - Summed
  - Total Order Discount
  - Total Order Surcharge
  - Product Add

Sequence 2

Sequence 3

Sequence 4

Selection Detail

Arbitration Type

Action Type

Price Action Type

Price Override

Update Tree

| Field or Control   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Transaction</b> | <p>Arbitration plans are defined by pricing transaction. The system uses this field to verify and limit the price by keys. In Add mode, select a transaction code. The transaction also determines other valid options, such as the price rules that you can specify in the plan.</p> <p><b>Note:</b> In PeopleSoft Customer Relationship Management (PeopleSoft CRM) installations, the OC transaction (order capture transaction) appears by default, and you are not able to select another value.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Price Date</b>  | <p>Select the transaction date that you want the system to use when evaluating date ranges for the price rules that are defined as Price Date. This date is used for the start date of individual products that are on the price list.</p> <p>Values are:</p> <p><i>Effective Date:</i> The default date used in the pricing process, it is similar to other dates, such as Order Date or RMA Pricing Date. In PeopleSoft Order Management, it is the order date; in PeopleSoft Contracts, it is the contract date.</p> <p><i>Order Date:</i> The date that the order header is created. The system uses the current date as the default date in a sales order header, but you can enter another date.</p> <p><b>Note:</b> PeopleSoft CRM uses the order date as the default transaction date. The field is not enterable for the OC transaction.</p> <p><i>Requested Arrival Date:</i> The date that the customer wants the order to arrive.</p> <p><i>Schedule Ship Date:</i> The date that the order line is scheduled to ship. The system calculates this date from the requested arrival date, using the transit lead time and exception ship dates, but you can enter another date.</p> <p><b>Note:</b> The requested arrival date and schedule ship date are used by transactions in PeopleSoft SCM only. The <i>Requested Arrival Date</i>, <i>Order Date</i>, and <i>Schedule Ship Date</i> are not applicable for RMA transactions and will be defaulted to the Effective Date which is the RMA Pricing Date.</p> <p><i>System Date:</i> The system date on the application server when the transaction is processed.</p> |
| <b>Default</b>     | <p>Select to establish the default arbitration plan for the transaction. The system uses the default arbitration plan when a customer does not have another associated arbitration plan or does not belong to a customer group that has an associated arbitration plan. You must have one and only one default arbitration plan for each transaction.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

## Arbitration Tree

Click the toolbar buttons to edit and navigate the arbitration tree.

### Note

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

| Field or Control        | Description                                                                                                                       |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| <b>Add Sibling</b>      | Click this button to add a new node to the same level as the selected node. This option is represented by a sequence in the tree. |
| <b>Add Child</b>        | Click this button to add a new node below the selected node or sequence.                                                          |
| <b>Copy</b>             | Click this button to copy the selected node to the clipboard to paste it elsewhere.                                               |
| <b>Copy Branch</b>      | Click this button to copy the selected node and any nodes that are below it.                                                      |
| <b>Cut</b>              | Click this button to remove the selected branch from the tree. The nodes are copied to the clipboard for pasting elsewhere.       |
| <b>Delete</b>           | Click this button to remove the branch from the tree. The nodes are not copied to the clipboard.                                  |
| <b>Paste as Sibling</b> | Click this button to paste the nodes from the clipboard. The nodes are inserted at the same level as the selected node.           |
| <b>Paste as Child</b>   | Click this button to paste the nodes from the clipboard. The nodes are inserted as a child of the selected node.                  |
| <b>Move Up</b>          | Click this button to move the entire selected branch up a sequence at the same level.                                             |
| <b>Move Down</b>        | Click this button to move the entire selected branch down a sequence at the same level.                                           |

## Selection Detail

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Arbitration Type | <p>Select from these options to add nodes to the arbitration tree to determine how the system applies the price rules. This list of values is determined during implementation on the Price Transaction Code page.</p> <p>You can set up the arbitration plan to sort matching price rules or to filter out other price rule definitions depending on the arbitration types that you choose at the top level of the tree. Values are:</p> <p><b>Action Type:</b> Select corresponding values from the <b>Price Action Type</b> field:</p> <ul style="list-style-type: none"> <li>• <i>Discount.</i></li> <li>• <i>Price Override.</i></li> </ul> <p><b>Note:</b> The price override is applied at whatever point you define it in the arbitration plan.</p> <ul style="list-style-type: none"> <li>• <i>Product Add.</i></li> <li>• <i>Surcharge.</i></li> <li>• <i>Total Order Discount.</i></li> <li>• <i>Total Order Surcharge.</i></li> </ul> <p><b>Note:</b> Total order adjustments are always applied to the total net order value after all other adjustments are applied. Defining the Total Order action types in the arbitration plan adds to the filtering function of the arbitration plan, and it helps to define the sort order of the price rules when performing stop-search processing.</p> <p><b>Cascading/Summed.</b></p> <p>Select either value from the Cascaded/Summed field.</p> <p><b>Note:</b> Summed price rule adjustments are always totaled and applied to the net price after cascading adjustments are applied. Using Cascading/Summed in the arbitration tree helps to define the sort order of the price rules when processing stop-search price rules. It does not affect the way in which the summed price rule formulas are applied to the transaction.</p> <p><b>Decision.</b></p> <p>Select one of the decision values that are used to break a tie in the case of the system encountering two nodes that match the rule.</p> <ul style="list-style-type: none"> <li>• <i>Apply Only.</i></li> </ul> <p>Specify the number of adjustments allowed for the selected decision type.</p> <ul style="list-style-type: none"> <li>• <i>Stop Here.</i></li> </ul> <p>Set to <i>Yes</i> if you want the arbitration plan to stop processing rules once the criteria selected for the decision point are met.</p> <p><b>Date Range.</b></p> <p>Use to limit the effectiveness of the arbitration plan branch. Enter a start date and end date.</p> |

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                  | <p>Also select whether the date is active or inactive in the <b>Effective Status</b> field.</p> <p><i>Price Rule.</i></p> <p>Enter a description and select a price rule. This value replaces the Exclusive Pricing feature in previous releases. Exclusive pricing IDs are arbitration plans with the price rule defined in the tree.</p> <p><b>Note:</b> This option is only used by PeopleSoft Order Management.</p> <p><i>Price Rule Source.</i></p> <p>Select a price rule source. The options are Enterprise Pricer and Promotion Management.</p> <p><i>Price Rule Type.</i> Select the type of price rule to arbitrate:</p> <ul style="list-style-type: none"> <li>• <i>Mutually Exclusive.</i><br/>Select to build a node that addresses how Enterprise Pricer should arbitrate mutually exclusive price rules.</li> <li>• <i>Pricing Base.</i><br/>Select to build a node that addresses how Enterprise Pricer should arbitrate pricing base rules.</li> <li>• <i>Regular.</i><br/>Select to build a node that addresses how Enterprise Pricer should arbitrate regular price rules.</li> </ul> <p><i>Price Type.</i></p> <p>Select corresponding values from the <b>Price Action Type</b> field. Values include:</p> <ul style="list-style-type: none"> <li>• <i>Extended Price.</i></li> <li>• <i>Quantity.</i></li> <li>• <i>Volume.</i></li> <li>• <i>Weight.</i></li> </ul> <p><b>Note:</b> The Order Capture transaction uses extended price and quantity only. In PeopleSoft SCM, <i>weight</i> and <i>volume</i> are available only for the Weight &amp; Volume transaction.</p> <p><i>Pricing Keys:</i> Enter a description and select a pricing key. The list of values is based on the pricing keys that are established for the transaction type. You can define a node that is similar to the price rule sequence that is used in previous releases.</p> <p><b>Note:</b> The pricing key fields that are defined here must match the price rule condition price-by field names exactly to apply to the transaction. Partial price key matches are not considered.</p> <p><i>Folder:</i> Select a folder in the node and enter a description to rename a folder in the node. You can group nodes of a tree and give them a name. Used for information purposes only.</p> |

| Field or Control   | Description                                                                                                         |
|--------------------|---------------------------------------------------------------------------------------------------------------------|
| <b>Update Tree</b> | Click this button to refresh the selections to the arbitration tree. Changes are not saved to the arbitration plan. |

# 8

## Working With the Pricing Simulator

### Understanding the Pricing Simulator

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

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

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

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

#### Viewing Simple Item Adjustments in the Pricing Simulator

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

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

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

#### Note

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

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

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

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

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

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

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

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

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

| Product ID | UOM | Quantity |
|------------|-----|----------|
| 10050      | EA  | 5        |

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

### Viewing Product Adds in the Pricing Simulator

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

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

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

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

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

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

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

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

| Product ID | UOM | Quantity |
|------------|-----|----------|
| 10050      | EA  | 5        |
| 10050      | EA  | 5        |
| 10050      | EA  | 5        |

- Click the **Calculate** button.

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

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

#### Related Topics

- PeopleSoft Order Management: Checking Price and Availability

## Running the Pricing Simulator

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

## Pages Used to Run the Pricing Simulator

| Page Name                                   | Definition Name    | Usage                                                                                                                                                                                                                                                                                        |
|---------------------------------------------|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Simulator Page</a>              | EOEP_TEST          | Use to test the pricing information that is set up with Enterprise Pricer and to select values for the transaction price-by keys that are used in the pricing simulation.                                                                                                                    |
| Pricing Keys, User Dates/<br>Variables Page | EOEP_TEST_LN_KEY   | Use to select and view the line-level pricing keys that are used in the pricing simulation. It also enables you to enter test values for user dates and user pricing variables.<br><a href="#">Simulator Page</a>                                                                            |
| Header Adjustments Page                     | EOEP_TEST_HD_ADJST | View the details of the adjustments that apply to the header.<br><br>The link for this page is only available if adjustments apply to the header.<br><a href="#">Simulator Page</a>                                                                                                          |
| Line Adjustments Page                       | EOEP_TEST_LN_ADJST | View the details of the adjustments that apply to the line. You can view the adjusted unit price and the price rule, formula, and keys that are used for the adjustment.<br><br>The link for this page is only available if adjustments apply to the line.<br><a href="#">Simulator Page</a> |

## Common Elements Used in this Topic

| Field or Control      | Description                                                                                                                                                                                                                                                                                                                                                                                       |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Key field code</b> | Represents the transaction field that is used to match to the price rules. The available values are based on the pricing keys established for the transaction.<br><br><b>Note:</b> You can update the pricing keys in the simulator in two places. Update the header level pricing keys on the main page of the Simulator page. The line-level pricing keys are updated on the Pricing Keys page. |

| Field or Control | Description                                                                                                                                                                                                                                                                                                                              |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Value</b>     | Represents the transaction value of the key field code. The available values are based on the selection in the Key field code field.<br><b>Note:</b> Line-level information that is entered in the <b>Header Information</b> section is applied to all lines in the simulation unless other values are entered explicitly for each line. |

## Simulator Page

Use the Simulator page (EOEP\_TEST) to use to test the pricing information that is set up with Enterprise Pricer and to select values for the transaction price-by keys that are used in the pricing simulation.

Navigation:

- **Pricing Configuration**, and then **Create Pricing Information**, and then **Price Simulation Tool**
- **Promotions**, and then **Manage Promotions**, and then **Simulate Pricing**

Click the **Simulate Pricing** link on the Promotions, Manage Promotions, Create Customer-Specific Promotion, Product Details or Product Prices page.

This example illustrates the fields and controls on the Simulator page (1 of 2). You can find definitions for the fields and controls later on this page.

### Simulator

**Price Test ID**

| Transaction | Description | Price Test ID |
|-------------|-------------|---------------|
| SO          | Sales Order | 1             |

Description

---

**Header Information**

|                          |            |  |
|--------------------------|------------|--|
| Currency Code            | USD        |  |
| Base Currency            | USD        |  |
| Transaction Date         | 01/24/2013 |  |
| Arbitration Plan         |            |  |
| Transaction to be Priced | SO         |  |

**Pricing Keys** [Personalize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

| Key field code | Value |  |  |
|----------------|-------|--|--|
| Business Unit  | US001 |  |  |

This example illustrates the fields and controls on the Simulator page (2 of 2). You can find definitions for the fields and controls later on this page.

**&Line Information** [Personalize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

| Line | Product ID           | UOM                  | Pricing UOM          | Qty    | Cost/Unit Usage | List Price | Net Unit Price | Price Protected          | Keys | Adjustments |
|------|----------------------|----------------------|----------------------|--------|-----------------|------------|----------------|--------------------------|------|-------------|
|      | <input type="text"/> | <input type="text"/> | <input type="text"/> | 1.0000 |                 | 0.0000     | 0.0000         | <input type="checkbox"/> |      |             |

**Transaction Total**

|                          |             |
|--------------------------|-------------|
| Total Net Price          | 0.00        |
| Adjustment Amount        | 0.00        |
| <b>Transaction Total</b> | <b>0.00</b> |

**Statistics**

|                               |   |       |
|-------------------------------|---|-------|
| Number of Rules Used          | 0 | of 45 |
| Number of Adjustments Applied | 0 |       |
| Number of Product Adds Found  | 0 |       |

**Note**

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

If you do not receive the desired results using the simulator, check that:

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

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

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

**Header Information**

Select information to simulate the transaction header and lines.

| Field or Control                | Description                                                                                                                                                  |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Currency Code</b>            | Enter the currency code of the simulated transaction.                                                                                                        |
| <b>Base Currency</b>            | Enter the base currency of the business unit for the simulated transaction.                                                                                  |
| <b>Transaction Date</b>         | Used to determine applicable price formulas. The current date appears by default.                                                                            |
| <b>Arbitration Plan</b>         | The list of available options is based on the transaction that you select. If you do not select an arbitration plan, the default is used.                    |
| <b>Transaction to be Priced</b> | Allows the user to test pricing for those child transactions whose <b>Pricing Data Used</b> is <i>Parent Application</i> on the Price Transaction Code page. |

**Line Information**

Select the Line Info tab.

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

| Field or Control                                                                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Unit Cost</b>                                                                  | Enables you to specify the unit cost for the item directly in the simulator.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>List Price</b>                                                                 | View the list or base price for the product.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Net Unit Price</b>                                                             | View the price after the adjustments are applied.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Recurring Price and Frequency</b>                                              | Retrieves from the list price that is applied to the line. These fields appear only if you use PeopleSoft Order Capture.                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Protected</b>                                                                  | Select if the product is price protected on the applied price list.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|  | Click the <b>Pricing Keys, User Variables</b> button to edit or view the pricing keys, user dates, and user variables for additional line level transaction information (in addition to the pricing keys on the Simulator page). You can use the page if you want to price the line by different values that the header or entire order. The available values are based on the pricing keys that are established for the transaction.                                                                                                                                                                |
|  | Click the <b>Adjustments</b> button to view the line-level price adjustments for the simulation. The button is visible only if there are header or line adjustments that match the criteria of the price simulation.                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Additional Information Tab</b>                                                 | Use to enter the schedule ship and arrival dates for the order as well as to simulate different pricing for KVI, NDP, and regular products.                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Pricing Details Tab</b>                                                        | Use to view a summary result of the pricing process for the line.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Pricing Quantity</b>                                                           | View the quantity in the pricing unit of measure that is used in the pricing calculation.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>List Price Origin</b>                                                          | View the origin of the list price.<br><i>Price List:</i> The price is retrieved from a price list. The price list ID appears next to <b>Price List Origin</b> field.<br><i>Price List (base):</i> The price is retrieved in the base currency from a price list. The price list ID appears next to <b>Price List Origin</b> field.<br><b>Note:</b> This value is used in PeopleSoft CRM only.<br><i>Product Price:</i> The price is retrieved from the Product Price definition.<br><i>Product Price (base):</i> The list price is retrieved in the base currency from the Product Price definition. |
| <b>Price List ID</b>                                                              | View the ID for the price list from which the list price is retrieved.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Pricing Base Price</b>                                                         | View the base price for the item in the pricing UOM.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Pricing List Price</b>                                                         | View the list price for the item in the pricing UOM.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

| Field or Control              | Description                                                                                                                                                  |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Pricing Net Unit Price</b> | View the net unit price for the item in the pricing UOM.                                                                                                     |
| <b>Payment Terms</b>          | View the terms that are retrieved from the price rule that matches the simulation.<br><b>Note:</b> This option is used in PeopleSoft SCM installations only. |
| <b>Margin Violated</b>        | This box is checked if the line violates any minimum or maximum margin rules.                                                                                |

### Product Adds

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

### Transaction Total

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

### Statistics

View statistical results of the simulation.

### Calculate

| Field or Control | Description                                                                            |
|------------------|----------------------------------------------------------------------------------------|
| <b>Calculate</b> | Click to calculate or recalculate the price simulation and view the price adjustments. |

# 9

## Updating Price Lists

### Understanding Price List Updates

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

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

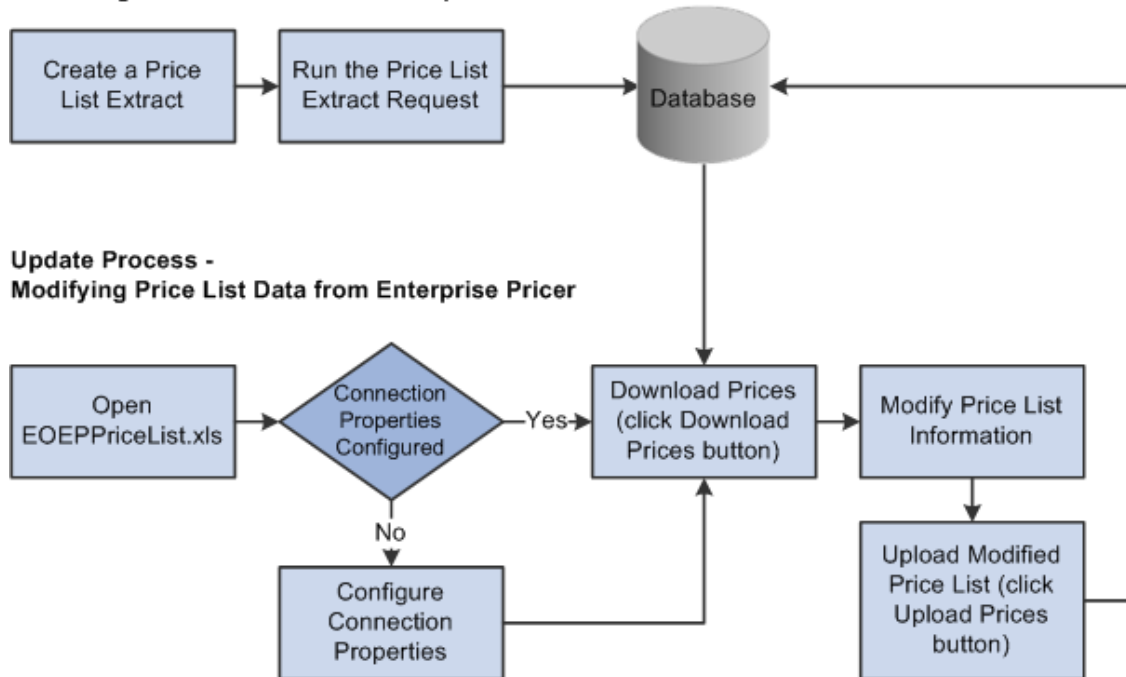
Remember that:

- You can change prices on the Price List page between the export and import of pricing data.

You can override those changes when new pricing information is imported from Microsoft Excel.

- Price list maintenance requires that you use portal navigation and a Windows client running Microsoft Excel.

The following diagram illustrates the Price List Maintenance process for performing mass price list updates.

**Price List Maintenance Process****Extract Process -  
Extracting Price List Data from Enterprise Pricer**

To update price lists using the Price List Maintenance process:

1. On the Price List Extract page, create a request for data, specifying the exact search criteria, and submit the job for processing.  
The application extracts the selected data and stores it in a EOEP\_LIST\_COST record.
2. Launch Excel Price List Update (EOEPPriceList.XLS).
3. Click the **Download Prices** button and supply logon data.  
Microsoft Excel loads and formats the received data.

**Note**

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

4. Click the **Price Maintenance** button or directly modify the spreadsheet to update prices.
  - You can adjust by amount or percent the price for all items in the price list.  
When choosing which rows to modify, you can specify criteria such as current-dated rows, future-dated rows, or all rows. In addition, you can apply the changes to visible, hidden, or all rows, as necessary. You can also specify the rounding decimals for the newly created prices.
  - You can adjust the start and end dates for the price list.

When choosing which rows to modify, you can specify criteria such as current-dated rows, future-dated rows, or all rows. In addition, you can apply the changes to visible, hidden, or all rows, as necessary.

- You can adjust the quantity break high and low for the price list.

When choosing which rows to modify, you can specify criteria such as current high and low quantity rows, future-dated high and low quantity rows, or all rows. In addition, you can apply the changes to visible, hidden, or all rows, as necessary.

- You can set the protect flag for all items in the price list.

When choosing which rows to modify, you can specify criteria such as current-dated rows, future-dated rows, or all rows. In addition, you can apply the changes to visible, hidden, or all rows, as necessary.

5. Click the **Upload Prices** button and provide logon data to upload the changes made to the price lists to PeopleSoft Enterprise Pricer.

Confirmation of the update is sent back to Microsoft Excel. For each row that successfully applies, the status column turns green and reads *Uploaded*. If the a row in the price list does not post properly, the column turns red and reads *Failed*.

6. Modify any rows that failed to post and click the **Upload Prices** button again to resubmit the rows.

## Prerequisites

Before you use the Excel spreadsheet to maintain price lists:

- The system administrator should confirm that the workstation is correctly configured.

Several supporting applications are needed to enable Microsoft Excel and the PeopleSoft system to communicate with one another. Additionally, some minimum system requirements exist for proper functioning of the download and upload of data between Microsoft Excel and the PeopleSoft system. Ensure that the workstation is an IBM Compatible PC running the Windows operating system and that Microsoft Excel for Office 2000 is installed. You also need the Microsoft XML Parser (MSXML.dll) Version 3.0 SP2 or later, Visual Basic 6.0 SP5: Run-Time Redistribution Pack, and Microsoft Office 9.0 Object Library or later.

- Enter connection information to the PeopleSoft system.

The information provided is saved to the spreadsheet for further connection attempts. The system administrator should complete this information on a copy of the EOEPPriceList.xls file and distribute the modified spreadsheet to all users. These are the settings for the connection properties on the EOEPPriceList.xls file.

| Property                | Set To                                                              |
|-------------------------|---------------------------------------------------------------------|
| Web Server Machine Name | Enter the name of the PeopleSoft web server.                        |
| Protocol                | Enter the Web server protocol, either <i>http</i> or <i>https</i> . |
| HTTP port               | Enter the port that the web server is using.                        |
| Portal                  | Enter the name of the portal that is used.                          |
| Site Name               | Enter the site name as defined.                                     |
| Node Name               | Enter the node name of the PeopleSoft system.                       |

| Property        | Set To                                                                                                                                                          |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Language Code   | Enter the PeopleSoft language code to specify the data download language.                                                                                       |
| Chunking Factor | If data is uploaded and processed by a component interface, enter the number of transactions that are sent at a time for processing by the component interface. |

- Obtain security permission.

The ability to perform price extracts using the Price Extract component (EOEP\_PRCLST\_XTRACT) is controlled by user security. You must have permission to use this object if you are responsible for extracting the price list data for mass maintenance purposes.

The modified price list data is uploaded by means of the EOEP\_PRICE\_LIST\_CI component interface. You must have permission to use this object if you plan to use the EOEPPriceList.xls file to perform mass Price List Maintenance for Enterprise Pricer.

## Updating Price Lists

This section discusses how to update price list.

### Page Used to Update Price Lists

| Page Name                               | Definition Name    | Usage                                                                                                                               |
|-----------------------------------------|--------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Price List Extract Page</a> | EOEP_LIST_RCNTL_PG | Export price list data to Microsoft Excel for mass adjustments or currency conversion.<br><a href="#">Exporting Price List Data</a> |

### Price List Extract Page

Use the Price List Extract page (EOEP\_LIST\_RCNTL\_PG) to export price list data to Microsoft Excel for mass adjustments or currency conversion.

Navigation:

**Pricing Configuration**, and then **Mass Updates**, and then **Price List to MS Excel**

This example illustrates the fields and controls on the Price List Extract page. You can find definitions for the fields and controls later on this page.

Price List Extract

Run Control ID PR Report Manager

Process Monitor

Run

Price List Request

\*SetID

\*Costing Business Unit

Product Cost Effective Date

01/24/2013

Price List ID

All

Single:

\*Price List As Of Date

01/24/2013

Currency

Currency Code

All

Single

\*Rate Type

\*Currency Effective Date

01/24/2013

| Field or Control            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Select Currency Code        | Select to restrict the download to a specific currency. A single price list ID can encompass price lists in more than one currency.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Currency Code To            | Convert an existing price list into another currency.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Cost Business Unit          | Select the warehouse for the system to use for retrieving cost data. Product costs for inventory items are stored per warehouse (PeopleSoft Inventory business unit).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Price List As Of Date       | <p>Enter a price list as of date. The system downloads the price list with the start date that is prior or equal to the date that you enter here and in all detail rows included on the price list. Each product on a price list can have more than one price—each with a unique start date and end date. Additionally, all future price list entries are downloaded.</p> <p>In this example, assume that the <b>Price List As of Date</b> field is set to <i>January 1, 2005</i>. The current price list entry, which has a start date of December 1, 2004 and an end date of December 1, 2005, is downloaded. Any price list entries that are before this current entry are not downloaded. Any price list entries that have a start date beyond this range are also downloaded.</p> |
| Field or Control            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Product Cost Effective Date | Determines which cost value to return.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

**Related Topics**

- [Understanding Price Lists](#)

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

## Updating Price Lists

Click the **Download Prices** button to download the information to the spreadsheet.

The **Toggle Display** button is the only other button that acts directly on the data in the spreadsheet; the other buttons open dialog boxes, where you select other options.

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

- The **Status** field identifies the status of the price list record in the PeopleSoft system.

When you export the price list to Microsoft Excel from the PeopleSoft system, the status reads *New*. When you modify a price list record and it successfully posts back to the PeopleSoft system, the status reads *Uploaded*. If an item fails to post in the PeopleSoft system from Microsoft Excel, the status column reads *Failed*.

- Key fields that identify the price list and product appear in yellow columns.
- Editable fields appear in the light blue columns.

These fields include **New Cost**, **New Price**, **Diff Abs**, **New Start Date**, **New End Date**, **New Break Qty Low**, **New Break Qty High** and **New Protected Flag**.

- Current price and cost information appear in grey columns.

These cells and all of the other cells on the spreadsheet are locked.

Click the **Customize Display** button to change the colors of these columns.

### **Note**

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

| Field or Control       | Description                                                 |
|------------------------|-------------------------------------------------------------|
| <b>Download Prices</b> | Click to populate the spreadsheet with product information. |

### Key Field Columns

| Field or Control               | Description                                                                                                                                                                             |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Prod. IDs</b> (product IDs) | View product IDs. A product ID might have multiple listings in a single price list if the product has multiple prices with unique start and end dates, units of measure, or currencies. |

### Editable Columns

The data in these columns updates the PeopleSoft tables. You can edit each cell individually or apply maintenance changes to multiple cells at once.

| Field or Control                                    | Description                                                                                                                                                                                                                                                               |
|-----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>New Cost</b>                                     | View cost information for inventory products and for non inventory products. You cannot edit this column.                                                                                                                                                                 |
| <b>New Price</b>                                    | Matches the value in the <b>Price</b> field for the date range represented by that row until you make changes.                                                                                                                                                            |
| <b>New Start Dt</b> (new start date)                | Matches the start date on the price list.                                                                                                                                                                                                                                 |
| <b>New End Dt</b> (new end date)                    | Matches the end date on the price list.                                                                                                                                                                                                                                   |
| <b>New Protected</b> (new price protected)          | When you establish prices on price lists, selecting the <b>Price Protected</b> option prevents the system from applying adjustments to the price. In addition, the <b>Price Protected</b> option on the sales order is selected. You can alter this option in the column. |
| <b>New Break Qty Low</b> (new break quantity low)   | Matches the low quantity on the price list. This is the minimum quantity on the order to select the price list entry.                                                                                                                                                     |
| <b>New Break Qty High</b> (new break quantity high) | Match the high quantity on the price list. This is the maximum quantity on the order to select the price list entry.                                                                                                                                                      |

### Current Price and Cost Information Columns

The information in these columns is available for comparison, but you cannot change the values. The toggle between the two differences affects both the **New Diff** (new difference) column and the **Diff %** (difference percent) column.

### Price List Maintenance Dialog Box

Use the Price Maintenance dialog box to apply changes to multiple products in the editable columns.

| Field or Control         | Description                                                                                                                                                                                                                                                                                                                                     |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Price Maintenance</b> | Click to access the Mass Maintenance dialog box.                                                                                                                                                                                                                                                                                                |
| <b>Type</b>              | Select the type of change: <b>Percent</b> , <b>Amount</b> , <b>Date</b> , or <b>Protected Flag</b> . The label of the first field changes depending on the type of change that you make. Options are unavailable when the selection criteria does not apply.                                                                                    |
| <b>Based On</b>          | Select the basis for the change: <b>Price List</b> (New Price column), <b>Differences</b> (difference between the cost and list price; New Diff column), <b>End Date</b> (New End Date column), <b>Start Date</b> (New Start Date column), <b>Low Quantity</b> (New Break Qty Low column), or <b>High Quantity</b> (New Break Qty High column). |

| Field or Control                       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Preview</b>                         | Click to see an example of the current change before you apply it to data. Remember that prices are not limited to positive values.                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Number of decimals for rounding</b> | When a pricing change is applied, you can alter the number of decimals that the system uses in rounding to the new price by changing the value in the field. Values are 0 to 4. You can round to a different number of decimals without changing any other data. Keep the default of 0 in the first field in the dialog box and alter the number of decimals for rounding.<br><b>Note:</b> The default value that appears in the number of decimals for rounding is determined by computer settings. To change the default, select <b>Control Page, Regional Settings, Currency</b> . |
| <b>Inserting and Deleting Rows</b>     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Field or Control                       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Insert New Row</b>                  | Click to insert a row after the highlighted row. The new row will copy the All Date Ranges and Adjustment Flag from the highlighted row.                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Delete Row</b>                      | Click to delete a row. You can delete only a row that was inserted using the <b>Insert new Row</b> button.                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

## Exporting Price List Data

Use the Price List Extract page (EOEP\_LIST\_RCNTL\_PG) to export price list data to Microsoft Excel for mass adjustments or currency conversion.

Navigation:

**Pricing Configuration**, and then **Mass Updates**, and then **Price List to MS Excel**

The **Currency Code To** field on the Price List Extract page appears. Enter a currency code to add a new currency within the selected price list ID. If the currency code that is entered already exists for the price list, the price list is updated.

The fields on the Mass Maintenance dialog box that pertain to currency updates are:

| Field or Control     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Exchange Rate</b> | <p>Enter the appropriate exchange rate in the <b>Apply this Exchange Rate to Prices</b> field. This value can change daily. Obtain the current exchange rate from the appropriate person in the organization.</p> <p>You cannot base changes on differences in this mode because the cost information appears in the original currency code, and the recalculated pricing reflects the currency to values.</p> <p><b>Note:</b> You must apply the same exchange rate to all the prices on the spreadsheet.</p> |

## Resetting Price List Data

Use the Reset Price List Data dialog box to reset the data to the original data from the download:

| Field or Control                   | Description                                                                                                                                                                       |
|------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reset Data</b>                  | Click the button on the Price Maintenance toolbar to reset the columns to the original settings from the download. You can apply resets selectively using the filtering function. |
| <b>New Prices to Active Prices</b> | Select to reset values in the New Price column to those that appeared at download. These are the same values as those in the Active Price column.                                 |
| <b>New Prices to New Cost</b>      | Select to reset values in the New Price column to match the values in the New Cost column.                                                                                        |
| <b>Start Dates</b>                 | Select to reset values in the New Start Dt column to those that appeared at download.                                                                                             |
| <b>End Dates</b>                   | Select to reset values in the New End Dt column to those that appeared at download.                                                                                               |
| <b>Protected Flag</b>              | Select to reset values in the New Protcd column to those that appeared at download.                                                                                               |
| <b>Low Quantities</b>              | Select to reset values in the New Break Qty Low column to those that appeared at download.                                                                                        |
| <b>High Quantities</b>             | Select to reset values in the New Break Qty Highcolumn to those that appeared at download.                                                                                        |

## Customizing Display Options

Use the Customize Sheet dialog box:

| Field or Control         | Description                                              |
|--------------------------|----------------------------------------------------------|
| <b>Customize Display</b> | Click the toolbar button, and select one of the options. |

| Field or Control                       | Description                                                                                                                                                                                |
|----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Color Selection</b>                 | Enables you to set the cell color for each of the three data types: key fields, new data, original data.                                                                                   |
| <b>Current Settings</b>                | Select each column from the drop-down list box, and enter values in the <b>New Heading</b> , field, the <b>New Width</b> field, or both if you prefer different headings or column widths. |
| <b>Adjust Column Width to Best Fit</b> | Select to set column widths so that the values entered appear. These widths override any manually entered column widths.                                                                   |
| <b>Display changed rows only</b>       | Select to display only those rows that are changed. To display all rows, deselect this option.                                                                                             |
| <b>Reset all Data Filters</b>          | Select to display all the downloaded data (if you have restricted the appearance of spreadsheet rows using the filtering option on one or more columns).                                   |
| <b>Apply</b>                           | Click to apply changes to each column one at a time.                                                                                                                                       |

## Printing Price List Data Changes

Click the **Print Price List** button to print the spreadsheet. The system includes auto-filter settings and prints only the rows that are changed.

| Field or Control        | Description                          |
|-------------------------|--------------------------------------|
| <b>Print Price List</b> | Click to print the spreadsheet data. |

## Displaying Price List Charts

Use the **Create/Display Charts** dialog box to create graphical charts of the list prices.

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

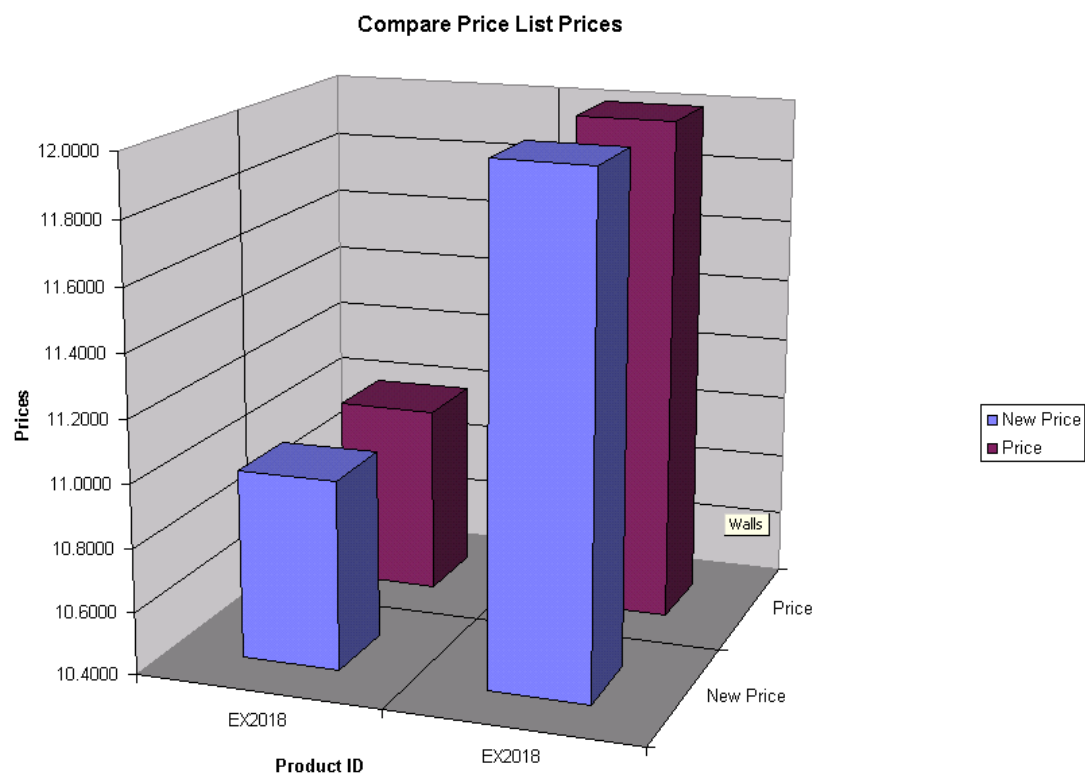
| Field or Control              | Description                                                                         |
|-------------------------------|-------------------------------------------------------------------------------------|
| <b>View Charts</b>            | Click to create charts based on prices, differences, or both.                       |
| <b>Create new Chart</b>       | Select to define the type of chart that you want to create.                         |
| <b>Display Existing Chart</b> | Select this option to select a chart that you want to view again.                   |
| <b>Return to Price Lists</b>  | Select to exit the chart creation process and return to the price list spreadsheet. |

In the Chart selection dialog box, select:

| Field or Control                        | Description                                                                                                               |
|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <b>Compare Prices on List</b>           | Select to compare the existing downloaded price and the new price entered.                                                |
| <b>Compare Differences</b>              | Select to compare the price differences among the items on the price list.                                                |
| <b>Both Price Lists and Differences</b> | Select to display a chart with both outputs from the <b>Compare Prices on List</b> and <b>Compare Differences</b> fields. |
| <b>Keep previous chart</b>              | Select to keep the previous chart. If you do not select this option, the previous chart is replaced.                      |
| <b>OK</b>                               | Click to display the chart that you have selected.                                                                        |

The following figure shows an example of a chart for comparison of price lists:

This example illustrates the fields and controls on the Example of a chart for price lists. You can find definitions for the fields and controls later on this page.



| Field or Control                | Description                                                                                                                                        |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Return to Product Prices</b> | Click the <b>Chart</b> button on the price maintenance toolbar and select the <b>Return to Product Prices</b> option to return to the spreadsheet. |

## Uploading Price List Data

The system uploads only rows with a change in the **New Price**, **New Start Dt** (new start date), **New End Dt** (new end date), **New Protd** (new protected), **New Break Qty Low** or **New Break Qty High** columns.

### Uploading Price List Data

Click the **Upload Prices** button on the price maintenance toolbar.

| Field or Control     | Description                                                                                                                                                                                                                                                                                                                          |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Upload Prices</b> | The prices are uploaded to the PeopleSoft system. If the row applies successfully, the status in the Status column for row changes to <i>Uploaded</i> . If the row does not apply successfully, the status in the Status column changes to <i>Failed</i> . Correct the errors for the row and click the <b>Upload Prices</b> button. |

# Enterprise Pricer Reports

## Enterprise Pricer Reports: A to Z

This section discusses:

- Price List reports.
- Price List nVision reports.

### Note

nVision reports are run from the PeopleTools window client.

### Note

For samples of these reports, see the Report Samples that are published with this online documentation.

## Price List Reports

| Report ID and Report Name                                                 | Description                                                            | Navigation                                                                                                    | Run Control Page |
|---------------------------------------------------------------------------|------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|------------------|
| EOEPPL01<br>Price List - Price List ID, Currency, and Product ID          | Lists price lists by price list ID, currency, and product ID.          | <b>Pricing Configuration</b> , and then <b>Price List Reports</b> , and then <b>Price List Report Options</b> | EOEP_RUN_1000_PG |
| EOEPPL02<br>Price List - Price List ID, Currency, and Product Description | Lists price lists by price list ID, currency, and product description. | <b>Pricing Configuration</b> , and then <b>Price List Reports</b> , and then <b>Price List Report Options</b> | EOEP_RUN_1000_PG |
| EOEPPL03<br>Price List - Product ID and Currency                          | Lists price lists by product ID and currency.                          | <b>Pricing Configuration</b> , and then <b>Price List Reports</b> , and then <b>Price List Report Options</b> | EOEP_RUN_1000_PG |

| Report ID and Report Name                                 | Description                                            | Navigation                                                                                                    | Run Control Page |
|-----------------------------------------------------------|--------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|------------------|
| EOEPPL04<br>Price List - Product Description and Currency | Lists price lists by product description and currency. | <b>Pricing Configuration</b> , and then <b>Price List Reports</b> , and then <b>Price List Report Options</b> | EOEP_RUN_1000_PG |

## Product nVision Reports

| Report ID and Report Name | Description | Navigation                              | Run Control Page |
|---------------------------|-------------|-----------------------------------------|------------------|
| OMPLST<br>Price Lists     | Price Lists | Run from the PeopleTools window client. | OM_PLST.XLS      |