Oracle Digital Experience for Communications

Using Launch Experience

October 2023

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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Use help icons ⑦ to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

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Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

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We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

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Thanks for helping us improve our user assistance!

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1 About This Guide

Audience and Scope

If you're looking for information on performing day-to-day tasks in your Launch Experience application, then this guide is for you. It describes the functionality and user flows of your application. The information is primarily aimed at product managers, marketing managers, and product catalog administrators.

Related Guides

Refer to the related guides listed in the following table to understand more about the business flows and functionality covered in this guide:

Guide	Description
Oracle Digital Experience for Communications Implementing Launch Experience	Describes tasks to set up Launch Experience and its related systems.
Oracle Digital Experience for Communications Launch Experience	Describes how you can use REST APIs to view and manage product catalog entities.
Oracle SCM Cloud Using Product Master Data Management	Describes user tasks for managing product catalogs, specifications, relationships, structures, and versions. Also describes importing and exporting product data and ensuring its quality.

Related Topics

- Oracle Help Center

2 Launch Overview

Get Started with Launch

Use this topic to understand how you can use the Launch application to design and deploy your catalog definitions from a central place.

What you can do using the Launch application will depend on your role. These roles and privileges are set up by your administrator as described in the Launch implementation guide. See *Create Users and Assign Job Roles*.

For example, if your sign-in as a product manager, you would typically see three work areas covering offers, promotions, and workbench. If you're an administrator, you will see an additional work area for administration as well. Similarly, business users may see work areas for only offers and promotions.

This table summarizes what you can do using each work area in the Launch application:

Work Area	Description
Offer Management	The Offer Management work area enables you to create and manage offers including offer design, revision, cloning, and so on. You use the guided flow for offer creation to traverse through the various options that include defining attributes, pricing, terms, rules, approvals, and so on.
Promotion Management	The Promotion Management work area enables you to create promotions with the related events and benefits.
Workbench	Use this work area to view and manage product specifications.
Administration	The Administration work area enables you to create and deliver product catalogs across multiple channels.

Read the chapters in this guide to know more about what you can do using the options in each work area.

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3 Catalog Entities

How Entities Work Together

Use this topic to understand the various entities in the Launch application and how they work together.

Types of Entities

You can use the following table to understand the definition of different entities then read about how these entities work together later in this topic. This guide contains a chapter on each of these entities.

Entity	Definition
Initiative	An initiative or project encapsulates catalog definitions so that you can publish these entities to the spoke systems. For more information, see *Initiatives Overview*.
Service Specification	Service specifications reflect the characteristics associated to a service, for example, data service or voice service. For more information, see *Service Specification Overview*.
Product Specification	Product specification, also known as product type, consists of detailed description of tangible or intangible characteristics that are made externally available through the product offer. These are the attributes associated with a product offer and define the technical aspects of the product offer. For more information, see *Product Specification Overview*
Product Offers	Product offer is an item that can be sold or ordered from the provider of the catalog or can also be tracked as an asset. A product offer can be a simple offer or bundle offer. A simple product offer has attributes, features, and characteristics that doesn't contain other product offers. A bundle product offer is an assembly of two or more product offers. For more information, see *Product Offer Guided Flow*
Product Offer Pricing	Product offer pricing refers to different pricing structures that you associate with the product offer. For example a one-time, recurring, usage fees, attribute-based pricing, and so on. For more information, see *Pricing Overview* .
Promotions	Promotions or promotional events refer to additional discounts, reduction, or awards on offers for customers who meet predefined criteria. For more information, see *Promotions Overview*.
Catalogs and Categories	Category is used to group product offers into logical containers. A product category can contain other categories. Each product offering in a product catalog combines pricing and availability information with product specifications that describe the relationships between products, the services used to realize the products, and the resources they require. For more information, see *Create Catalogs and Categories*

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Entity	Definition
Rules	Rules are different types of conditions that you can set for product offers and product specifications. Using rules you can set conditions that validate the eligibility or compatibility of offers or specifications, verify the downgrade or upgrade from the defined terms, or check recommendations. For more information, see *Rules Overview*.
Product Lines	Product lines group similar product offers. For more information, see *Product Lines Overview*.

Understanding Entity Relationships

Here's how the entities are related to each other.

A product is usually a service or a resource instantiated by a product offer which is always defined by product specifications. Product specifications are detailed descriptions of tangible or intangible objects available in the form of a product offer to users.

Product offers are created as simple or bundle offers. A simple offer is an atomic offer, whereas a bundle offer is a grouping of simple offers or nested bundle offers. An example of a bundle offer is a home-based internet service that combines three simple offers, such as, internet connection, e-mail service, and home security.

After you decide the offer type, based on product specifications, you can associate prices to the offer. You can use a simple or advanced pricing model. A simple pricing model comprises one-time fee, recurring fee, or a usage fee. An advanced pricing model comprises allowances, tiered pricing, attribute-based pricing or overages. Additionally, existing price plans avoid proliferation of offers and help manage pricing structures. Along with pricing, alterations are also made to charges incurred for a product offer and can take many different forms, such as adjustments and discounts. Price alterations like discount and markup can be specified on specific price types for service bundles, packages, or commercial bundles.

You can also add promotions to an offer to provide additional benefits such as discounts, reduction, or awards over a short duration to a customer who has met pre-defined criteria.

Further, you can add rules to help determine how a product offer is made available in the market. Eligibility rules decide the parameters, compatibility rules specify the inclusion or exclusion of a combination of products, recommendation rules provide cross-sell and up-sell opportunities, and upgrade and downgrade rules define the permissible offers to migrate to or migrate from with defined terms.

The product offers are also grouped into catalogs and categories, which represent the collection of product offers. The product offers can also be grouped based on product lines. When a product offer is created taking into consideration the various aspects described earlier, it's published to the market whereby it's treated as a product for customer service providers.

Initiatives tie all the entities together to help manage the lifecycle statuses of all the entities and publish them into a production run-time environment. When you create or edit entities, the in-design entities available for selection within the fields on the page are in context of the initiative you specify on that page. For example, when you create offers, the product specifications drop-down list will contain only those in-design specifications that are associated to the initiative specified on the page.

Read the chapters in this guide for more information about creating and managing these entities in the Launch application.

Entity Validations

Validations are enforced into top-level entities to ensure that the referenced or included resources must be valid during the effective period of the top-level resource. For example, a product specification valid from Oct 1, 2018 to Dec 31, 2018 cannot be used to create an offer having valid from Nov 1, 2018 to Mar 30, 2019.Only if the validity of the product specification had a wider validity covering the offer validity, it would be possible to create the product offering.

Search and Filter Entities

You can use the search option available on the landing page of each top-level entity in the Launch application to narrow down your search within the listed entities.

The search filters include the following options and the search results may vary depending on how the search is set up or what data is available.

- Auto complete
- Type ahead
- Recent
- Tags
- Count
- Lifecycle status

4 Initiatives

Initiatives Overview

Use this topic to understand what initiatives are and how you create and manage them.

An initiative is a collection of all the catalog definitions. You manage the lifecycle status of all catalog entities using initiatives. Initiatives help you define and test the proposed changes in isolation from other unrelated initiatives.

For example, in design, you create multiple catalog entities. After you have created these catalog entities, you need a way to test them together. To test all these entities, you can associate them to an initiative and then publish the initiative into a testing environment. This saves you time to individually push your catalog entities into testing. When you move an initiative to a testing environment, the application moves the status of all the related entities into the `In Test` status.

After you have finished your testing, you can make the initiative active. This action moves all the catalog entities into a production run-time environment and the status changes to the next available lifecycle status.

For example, let's say a market opportunity motivates a marketing product manager to start a new offer initiative for Spring Season. The marketing manager is assisted by the service domain specialist and by the product manager to define the content of the initiative. Further, the buying, revenue and the billing specialists join briefly to assist with testing. Finally, the sales marketing manager takes over the initiative ownership through roll out. The service domain specialist introduces a new set of service features and enables them for commercialization. Further, the marketing product manager joins to test and to learn about the new service features. Later, the marketing product manager introduces a series of commercialization initiatives to address market opportunities for the new service features.

> **Note:**
> - When you create or edit entities, the in-design entities available for selection within the fields on the page are in context of the initiative you specify on that page. For example, when you create offers, the product specifications drop-down list will contain only those in-design specifications that are associated to the initiative specified on the page.
> - If the offer and the initiative being cloned are still in design, then the initiative can't be changed. Please retry with all the entities in the active state.

Related Topics
- Manage Entity Lifecycle Using Initiatives
- Publish Initiatives to Spoke Systems

Create an Initiative

Here's how you create an initiative.

1. Go to **Administration > Initiatives** and click **Create**.
2. On the New Initiative page, enter the name and description. The ID is automatically generated for you.
3. Specify whether the initiative requires approval.

4. Click **Create**.

Your initiative is now created and listed on the Initiatives page. By default, a newly created initiative will be in the `In design` state. You can now associate catalog entities to this initiative.

Manage Initiatives

The initiatives that you have created are listed on the Initiatives page, where you can view and edit, manage lifecycle statuses, and approvals for your initiatives.

View Initiatives

Select **View** from the ellipses menu to view an initiative. On the View Initiatives page, you can see details about the initiative including the following:

- Initiative details with the basic information.

- All the product offers and entities that are included in an initiative.

- Publishing activities that an initiative has gone through. You can also see the different spoke systems where this initiative was published and the publish status of the initiative in those spoke systems.

Edit Initiatives

Click ellipses and then select Edit to edit an initiative. When you're in the scope of editing an initiative you can update the name and description of the initiative.

Manage Lifecycle Status

You can update the lifecycle status of an initiative from the ellipses menu on the list page. Select the lifecycle status and click Confirm to change the status.

When you click Confirm, it implies that all the changes that you have made to the initiative are in design complete and you're ready to move the initiative to the next lifecycle status. Also, once you click Confirm for an initiative, you can no longer edit the contents of the initiative, as they become read-only.

Seek Approvals Using Initiatives

Optionally, you can mandate approvals for offers associated to an initiative. For more information about offer approvals, see *Manage Offer Approvals*.

Related Topics
- Publish Initiatives to Spoke Systems

Publish Initiatives to Spoke Systems

Use this topic to know how you can publish an initiative to the spoke systems.

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You can use an initiative to publish multiple run-time catalogs to the spoke systems. When you publish an initiative, all the entities within it are published. You define your catalog, push to a test environment, validate the product offer, and finally publish to a production environment.

Here's how you can publish your initiatives when you haven't set any approval process:

1. On the Initiatives page, select the initiative that you want to publish.
2. Click **Confirm** from the actions menu. This moves the initiative and its entities to `Ready to Publish` status.
3. Click **Publish** from the actions menu. This option is available only if your initiative is in the `Ready to Publish` status.

If you have set an approval process, here's how you can publish your initiatives:

1. On the Initiatives page, select the initiative that you want to publish.
2. Click **Confirm** from the actions menu. This moves the initiative and its entities to `Design Complete` status.
3. Click **Initiate Approval** from the actions menu.

   Your approver gets a notification for the approval request and you receive a confirmation message that your approval process is now initiated. Your approver may approve, reject, or add a comment for your request. You can check the status of your initiative from the initiatives list view page. If your request has been approved, the status changes to `Ready to Publish` state.
4. Click **Publish** from the actions menu. This moves the initiative and its entities to `Launched` status.

The initiatives and entities are published and moved to an external application. So, from an In Design state, you can move the initiative to a test environment. Once testing is complete, the initiative progresses through its lifecycle. The publish process is driven by the lifecycle statuses. The destinations are automatically identified based on the lifecycle entry configuration. After you have published your initiatives, go to the **Publish Tracker** to see the status of the published initiatives.

Related Topics
- Manage Entity Lifecycle Using Initiatives
- Manage Offer Approvals

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5 Service Specifications

Service Specification Overview

Use this topic to understand what a service specification means.

A service specification is functionally a template using which you can instantiate or modify services in the provisioning system.

Service specifications reflect the characteristics associated to a service, for example, data service, or a voice service. While product specifications are a functional representation of service offerings from a marketing or sales perspective, service specification are the representation of its realization, provisioning, and activation.

A product specification is restricted to service specification for non-tangible goods (services). Configuration of service specifications enable the customer services to be translated into supporting technical services.

Define and use a service specification

As a service domain specialist, you must create service specifications through REST APIs and associate one or more service specifications to your product specification and use them while creating an offer. For example, for a wireless service such as Mobile Messaging, you use the mobile service specification characteristics, associate it to the Text Messaging product specification, and create an offer called SMS Unlimited.

You can associate more than one service specification to the product specification but you must specify a primary and auxiliary service specification relationship. You must associate service specifications for product specifications that are used for creating offers of type service or service bundle offers. Device type offers are associated with product specifications that do not have service specifications.

Related Topics
- Product Specification Overview
- Product Offer Guided Flow

Manage Service Specifications

You can create and manage your service specifications through REST APIs or through the user interface.

For more information on using REST APIs, see *Use REST APIs to Create Catalog Entities*.

The user interface allows you to perform the following tasks: create, update, delete, list or find service specification objects, retrieve a service specification by ID, and partially update a service specification by ID.

To create and edit service specifications from the user interface:

1. Click Workbench and then select **Actions** > **Create Service Specification**.

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2. In the Identifying Information section, specify the name, description, service code (optional), and select the Initiative to which the service specification is associated.

> **Note:** A default **ID** is generated for you, but you also specify your own ID.

3. Specify the effective start and end dates of the service specification.
4. Add new or existing attributes. When you add new attributes you can create simple or aggregate attributes.
5. Add collaterals that include attachments like images and documents from the OCE.

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6 Product Specifications

Product Specification Overview

Use this topic to understand what product specifications are and how you create and manage them in the Launch application.

Product specifications determine how product offers are used during the following stages in their lifecycle:

- At design time including their characteristics, characteristic values, characteristic layout structure, and restrictions.

- When customers are ordering or configuring them, including their configuration layout, configuration model, and transactional attributes.

- When product offers are provisioned, including their service specification and the constraints on their billing specification.

Product specifications also control how product offers can be priced.

Define and use a product specification

Before you clone, revise, or delete a product specification or offer, you must review the entities that may be referencing the specification or offer. Viewing references helps you assess the effect that your actions might have on the related entities and can help prevent the proliferation of offers to the market. You can view these references from the actions menu on the landing page of a specification or offer.

The Workbench page displays a list of all your product specifications along with details such as name, version, description, lifecycle status, and so on. You can manage your product specifications using the various options provided to you on this page as follows:

- Create product specifications and use them as you create a product offer.

- View, edit, delete, revise, retire, and obsolete existing product specifications.

- Create new product specifications by including simple or aggregate characteristics

- Manage product specifications by editing or removing both simple and aggregate characteristics.

- Include data types in attributes like strings, integers, boolean, and decimal, provide a range of values for numeric data types, provide unique sequence numbers to the characteristics, and specify constraints for an attribute value by using language agnostic regular expressions.

- You can also provide additional information like display name, isConfigurable, extensible, isUnique, cardinality and any default value associated with the characteristic. You can also mask any information that is sensitive.

- Associate your product specifications to an initiative.

- Change the lifecycle status of product specifications. Associate your product specifications with additional specifications, such as:

  - o Parent product specifications: Associate and inherit the attributes from parent product specifications to the product specification that you're creating and view these in the Inherited Attributes section. When you create offers using product specifications, you can use the attributes from the specification as well as the ones inherited from the parent specification. This enables you to create a hierarchy of product

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specifications through inheritance which promotes reusability and proliferation of product specifications. Service specifications:

- o Service specifications reflect the characteristics associated to a service, for example, data service, or a voice service. You can create service specifications through REST APIs and associate multiple service specifications to your product specification and use them while creating an offer. For example, for a wireless service such as Mobile Messaging, you use the mobile service specification characteristics, associate it to the Text Messaging product specification, and create an offer called SMS Unlimited.
- o Usage specifications: Usage specifications refer to the usage characteristics of a service, for example, you can set up a price of $50 for 100 GB of data usage, where the rates are based on phone call origin and destination. You can create usage specifications via REST APIs.
    - - Metering Rule: Metering rule enables you to define the way you would charge the actual usage of a service. You can associate a usage specification and service specification with the product specification and specify a metering rule. A metering rule is an expression, such as volume, duration, or occurrence. For example, a duration metering rule is calculated as Start Time to End Time.
- o Customer profile specification: Customer profile specifications refer to the customer categories based on different characteristics, such as Gold, Platinum. You can provide special rates for customer types like gold and silver. You can create usage specifications via REST APIs.

- • Create a SKU template using the attributes of the parent product specification or your current product specification and specify the SKU code formats. SKU part numbers help you group similar product definitions (simple physical goods with variant attributes), and allow you to generate SKU numbers for the different combinations of product attributes. Here's an example. A physical device, such as, a smart phone can be sold in three colors (black, white, gold) with three storage types (64GB, 128GB and 256GB). This results in nine different combinations that can be purchased. Each combination requires a part number that can be used by the back end fulfillment system when purchased. Now, instead of creating nine different product definitions, a single product definition leveraging product attribute-based pricing with its own part number can be assigned to each combination of attributes. This enables you to efficiently manage device variant pricing and fulfillment.

Related Topics
- • Service Specification Overview

Create a Product Specification

To create a product specification:

1. Click **Workbench** and then click **Create Product Specification**.
2. Specify the name, effective start and end dates, and other details about the product specification. Here are some considerations when creating a product specification:
    - o You can select an initiative to associate your specification with, and specify the service specifications you want to associate your product specification with. You can also associate a primary service specification to your service specification.
    - o Specify the parent product specification if you want to inherit and associate attributes from a parent product specification to the specification that you are creating.
    - o If you do not specify a layout during offer definition, then the attributes page displays the default layout.

Create and Edit Attributes

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If you choose to create a new attribute, here's how you can go about it:

1. Click **Add New Attributes**.
2. On the New Attributes page, select either **Simple** or **Aggregate** and provide the required information.
3. Click **Add**.

To add more related attributes, click **Add Related Attributes**. Your attributes now appear in the Attributes section.

To edit an attribute:

1. In the Attributes section, select an attribute and from the **Actions** menu click **Edit**.
2. On the Edit Attribute page, you can update the different available parameters.
3. Click **Add**.

Create a SKU Template

You can choose to create a SKU template with the attributes of the parent product specification or your current product specification. Here's how you can go about it.

1. On the Create Product Specification page, SKU template section, click **Add SKU Template**.
2. On the New SKU Template page, provide a name, description, and add the required attributes.
3. Click **Add**.

    A SKU Code section appears on the New SKU Template page.
4. Add ID and values for each of the SKUs that you just created.
5. Optionally, you can also click **Add Images** to add an image to your SKU template.
6. Click **Add**.

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7 Custom Profile Specification

Custom Profile Specification

Custom profile specifications are general-purpose specifications defined for use within Launch for different constructs like the trade-in, charging term, suspension term, and promotion profile specification.

As a technical specialist, you can create, view, edit, and delete these custom specifications in the Launch application.

Create Custom Profile Specification

To create a custom profile specification:

1. Open the **Workbench** and then select **Custom Profile Specification**.
2. In the identifying information section, specify the name, effective period, the associated initiative, and the profile type of the custom specification.
3. In the attributes section, you can associate attributes to the custom profile specification by adding new or existing attributes.

   To add a new attribute:
   a. Click **Add New Attributes** to add a new attribute. In the **New Attribute** page, select the type of the attribute. Provide the required details like name, type of the attribute, the unit of measure (UOM), description, minimum and maximum cardinality of the attribute.
   b. In the **Attribute Values** section, provide the attribute values and specify the default value.

   To add an existing attribute:
   a. Click **Add Existing Attributes** to select and add existing attributes.
4. Click **Create** to create the custom profile specification.

8 Product Offers

Product Offer Guided Flow

Use this topic to understand how you can use the guided flow in the Launch application to create product offers. The following are the high-level steps in the guided flow that you may use for creating an offer:

- General Information
- Collaterals
- Marketing Information
- Components
- Attributes
- Pricing
- Terms
- Rules
- Approval History

General Information

Use general information to provide details about the product offer that you're creating, which includes the following:

- You can enter basic information about the offer, such as name, description, and specify the product offer effective period. You can tag an offer with keywords that suggest an offer's type, specialty, domain, and other characteristics that make the offer easily searchable. For example, you can tag a package with keywords such as a 4G, 5G, or prepaid to postpaid migration.

  You can also create a new offer type called **Others** to model an offer without attributing a type. You just need to add the **Others** attribution in the lookup ORA_ATC_PRDUT_TYPE. For example, communications service providers who have Siebel CRM define the installation charges, activation charges, and discount charges as product definitions. These definitions don't fit into any of the offer classifications in Launch, but these are part of the bundle or promotions. In such cases, service providers can create an offer of type Others.

- You also have the choice to set up the following options:
  - Make this offer orderable at the appropriate channel. The channel could be a call center, digital store, or physical stores.
  - Enable Bring Your Own Device (BYOD) option to allow your customers to use their existing devices such as smart phones, tablets, or a smart watch.

    Note: BYOD is available for only device and package type offers that have **Orderable** and **Supports BYOD** options enabled. Customers must create a product specification covering attributes of the device, such as IMEI, make, model, and so on.

  - Set up this offer to be configurable at runtime sales catalogs.
  - Track this offer as an asset.
  - Define this product offering as shippable for physical goods.

      ○ Allow manual override to allow runtime manual adjustments for shipping or other purposes.

> **Note:** When you create or edit entities, the `In Design` entities you can select are in context of the initiative you specified. For example, when you create offers, the product specifications drop-down list contains only those in-design specifications associated with the specified initiative.

- You can compare the revised offer with the launched offer. To compare, select the launched offer version from the version drop-down field in the **General Information** tab.

Collateral Information

Use collateral information to attach digital content to your offer.

Launch Experience uses the Oracle Content and Experience Cloud (OCE) as a repository for digital content of several types. The digital content types include images for SKUs, banners, videos, marketing collateral, attachments, agreements, terms and conditions, and so on.

- As an administrator, you must log in to OCE and upload your digital content, as required. As a product manager, when you create an offer, you will be able to view the digital content in OCE and associate any digital content to an offer through the Digital Content tile in the Administration module on your dashboard.

  For more information on how to add digital content to OCE and then associate digital content to an offer, see *Create a Simple Offer*.

  > **Note:** You publish the content and associate only published content to Launch Experience entities.

- You can add agreement templates to your offer.

  Agreements are typically in the context of bundle product offers of type package. An agreement defines the obligations to offer, provide, or produce specific products or services. It applies over a set period of time for a specific amount of money and is legally binding.

  An agreement typically includes detailed descriptions of pricing, terms, limitations, coverage, conditions, legal rights, processes, and guidelines. Agreements are typically authored by a communication service provider's legal, risk, or compliance teams as agreement templates. As an administrator, you can upload the agreement templates to a specified folder in Oracle Content and Experience Cloud (OCE).

  As a product manager, you can associate an agreement template from OCE to a product offer and use it in a commercial catalog.

  A sales agreement can include entitlements that contain special pricing for the products. A service agreement can include entitlement-based service level agreements. Entitlements include information about the benefits, conditions of entitlement, and service metrics. As a catalog administrator, you can create and manage entitlement templates that are associated with applicable products and services. For more information on agreements and entitlements, see *Agreements and Entitlements*.

Marketing Information

Use marketing information to add details to your offer such as banners and marketing features. Both, marketing features and banners are used in your storefront to highlight the unique selling proposition of the offer that's being rendered to the user. It's also used by the care agent to articulate the key features of the offer. Additionally, you can also add promotion tags to your offer.

- Storefront Banners: A banner is a way to highlight an offer to make it stand out while displaying a variety of offers, both on the digital channel of engagement and for the agent assisted ordering channel. For example,

while displaying 5+ offers in the storefront, highlighting one offer as 5% early bird discount or available only today, with a time period validity is the main objective of a banner.

- Offer Marketing Features: A marketing feature describes important characteristics of a commercial offer that stands out among the other features pertaining to the offer. For example, data transfer rate or the storage capacity. You can create a list of these marketing features for an offer under marketing information.

  As a product manager, you can create, modify, or delete the marketing features for a product offer at design time. Irrespective of the offer type you create, you can add the marketing features for an offer.

- Promotion Tags: Promotion tags help you filter offerings and provide promotions at a product line level. As a product manager, when configuring an offering of type simple and bundled offer (service, commercial, packages), you can add, edit, or remove promotion tags by allowing the user to choose the promotion profile specification entity which has attributes and attribute values. For more information on promotions, read the chapter in this guide on promotions.

Attributes

The attributes are available for only simple product offers and are characteristics of the product specification. The data depends on the product type that you select.

Here you can do one of the following:

- View the attribute values setup at the product type level that are inherited by the product offer.
- Use Set Restrictions to set restrictions on the list of values available at runtime on the configurable attributes.
- Set values for any free form attributes.

Components

Components are available for only bundle product offers. The components enable you to select and aggregate product offers based on product line or a product specification. Additionally, you can also provide option groups for them. Irrespective of the bundle offer type that you create, you must associate the offer type to an initiative.

Here's what you can do using components:

- For a bundle offer of type package, you can create an aggregation.
- For a bundle offer of type commercial or service bundle, you can create option groups.
- Override the commitment terms of the components of a package.

  A component in a package can contain commitment terms that can be different from the commitment terms of a package. For example, consider two packages with commitment term requirement of 24 and 12 months and they include a commercial bundle with a commitment term of 18 months. The packages can override the commitment term of 18 months of the included commercial bundle to 24 and 12 months as per their requirement.

- A package containing multiple services can be ordered together while allowing the subscriber to modify or disconnect individual services. There are runtime scenarios that allow a subscriber to cancel or modify one or more services with applicable rules and penalties. You can now configure what kind of action the runtime order capture application should take upon such situations by specifying the component actions in the package. The available actions are modify, disconnect and prompt.

Aggregation: An aggregation is a collection of offers associated to a product line or a product specification with a default and cardinality limit. Here's an example. Brand A has 15 phones associated to a product line, of which 8 belong to a product specification and 7 other to another set of product specifications with similar characteristics. For a package

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type offer, if you choose to provide a discount on all the 15 phones, then instead of selecting the 15 different phone offers, you could create an aggregation depicting the product specifications that the 15 phones belong to. This way all the offers associated to the product specification get the discount. This reduces the effort to create different packages for different offers.

Option Groups: An option group is a grouping of atomic offers. You can create option groups while creating bundle offers (service bundles or commercial bundles). As a product manager, you can use option groups to group similar atomic offers and set cardinality at the group level. Here's an example: consider a wireless data bundle that groups atomic offers: 1GB Data Offer, 5GB Data offer, and a 10 GB Data Offer. Additionally, to support a business requirement as part of the bundle, requires that the customer must choose one and only one data option in the service bundle. Here, you must create an option group and set up the options of Select One or None at the group level.

You can override the default value of an option group at a package level. This enables you to set a different default value within the context of a package and avoid bundle-offer proliferation.

You can reuse a commercial bundle with its subset of option group choices by overriding the options available. This gives you the ability to create different packages from a commercial bundle at runtime. For example, using the wireless data bundle in the previous example, you can create a package containing 1GB and 5GB data offers and another package containing 1GB and 10GB data offers.

You can configure option groups within a service bundle. For bundle offers of type service, you must associate a product specification that has a primary or an auxiliary service specification associated with it. You can also associate simple offer types such as devices, accessories, and services to a service bundle offer.

Override the commitment terms of the components of a package: Components of a package can have their own commitment terms and can be different from the commitment needs of the package you are configuring. When you reuse components in different packages you can override the commitment terms of the components and create your own commitment terms suitable for your package.

Pricing

Use pricing to specify how an offer must be priced. Depending on whether your offer is a simple offer or a bundle offer, this section presents you with different options to configure the pricing scenarios.

For example, in a simple product offer, you can set up a one-time fee, a usage fee, a recurring fee, or use existing price plans from a price list, which is a set of standard prices for products and services. And in a bundle product offer, you can alter existing prices at the simple offer or at the bundle level. Additionally, you can associate your price plans with commitment terms, which enables you to use the same product offer with different commitment terms.

You can capture general ledger ID, tax code, and also specify tax inclusion or exclusion in bundle alterations.

You can also use a price list, which is a set of standard prices for products and service, to offer different prices for the same product with different commitment terms. You can define the type attribution for a price list based on customer segment, location, or any logical extensible value. For example a price list type can be residential, business, and so on.

You can alter the prices in an offer using drag and drop to redefine the sequence. You can also add an existing price alteration to atomic offers using one of the list options under **Add alterations**.

You can use time-limited adjustment at the component-level or fee-level of a bundled offer. Time-limited adjustment enables you to provide bundle-level adjustment for a limited time relative to the purchase date of the offering.

Terms

The terms page enables you to set your payment terms and specify whether it's prepaid or postpaid.

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As a product manager, you can also define the charging or suspensions terms for an offer by selecting the seeded charging or suspension term template from the Launch application UI. This enables the spoke systems to apply the same terms as configured in the offer during the charging or suspension scenarios.

Remember that the templates are your starting point for applying seeded terms to an offer. After selecting a template, you can change the values applied by the template using the UI. For example, if a purchase is prorated in the template, a product manager may opt out of it while creating the offer. You can also create additional templates using the format of the seeded template.

The seeded term templates must be created as part of the implementation. See Supporting files for Oracle Digital Experience for Launch (Doc ID 2826909.1) on My Oracle Support for information on creating the charging term or suspension term templates.

You can also define renewal terms on a product offering using renewal term templates to handle subscriber contract renewals.

Rules

Rules are different types of conditions that you can set for product offers. When you set a rule, you can also specify the duration for which the rule is applicable. See *Rules Overview* for more information on rules.

Approval History

Using the approval history page you can view the trail of approvals associated to your offer. See *Manage Offer Approvals* for creating offer approvals.

Create a Simple Offer

Here's a guided flow to create a simple offer:

1. On the Launch Application dashboard, click **Offering Management**.
2. On the Offers page, select **Create Simple Offer**.

You are now taken to a guided UI flow to create the simple offer.

General Information

1. In the Basic Information section, enter the name and description of the product offer.
2. Specify the details as applicable and click **Continue to Collateral Information**.

Collateral Information

In this section, you can optionally associate digital content to your offer. Before you associate digital content to your offers, you must add the digital content to Oracle Content Management as an administrator.

Here's how you can add digital content in the Launch application:

1. Go to **Administration> Digital Content**.
2. Click **Manage**.

   Note: Clicking Manage takes you to Oracle Content Cloud Assets Repository.

3. Search for the asset you want and add it.

   For more information on creating and adding assets, see *Oracle Content Management*.

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After adding assets, you are all set to associate the digital content to your offer. Here's how you do it:

1. On the Collateral Information page, click **Add Images** or **Add Collaterals**, as required.
2. Select the items and click **Select**.

Your digital content is now added to your offer and appears in your Images or Collaterals section. If you want to upload marketing information for your offer, click **Continue to Marketing Information**.

Marketing Information

Optionally, specify the marketing information, such as, storefront banner, offer marketing feature, and promotion tags.

Here's how you can add a storefront banner:

1. On the Marketing information page, click **Add Storefront Banner**.
2. Specify the details and click **Add**.

To add a marketing feature:

1. On the Marketing information page, click **Add Offer Marketing Feature**.
2. Provide the details and click **Add**.

You can also add promotion tags to your offer. For more information on adding promotion tags, see *Create a Promotion Tag*.

To move to the next page, click **Continue to Attributes**.

Attributes

On the Attributes page, you can see all the attributes that are defined for the product type you had selected. The behavior of the page is driven by the product specification that you may or may not specify. You can also set restrictions here. For example, you can create a phone specification in grey or black color.

For more information on creating attributes, see *Create a Product Specification*. To move to the next page, click **Continue to Pricing**.

Pricing

On the Pricing page, select your pricing plan which can be one of the following:

- One-Time Fee
- Recurring Fee
- Usage Fee
- Existing Price Plans

For more information about configuring pricing, see *Product Offer Pricing* its related sections.

To move to the next page, click **Continue to Terms**.

Terms

On the Terms page, you can set up your payment terms:

1. Enter the term name and the payment type.
2. Click **Save**.

To move to the next page, click **Continue to Rules**.

Rules

On the Rules page, you can set up the various types of rules namely eligibility, compatibility, recommendation, and migration rules. See *Rules Overview* and its related sections for more information about rules.

Finally, click **Create** to save your offer. You have now created your simple offer.

Here's a pictorial representation of a few simple product offers. You can use these simple product offers to create bundle product offers.

Wireless Service

Call Forwarding

200 Text Messages Per Month

Mobile Roadside Assistance

Charger

Leather Pouch
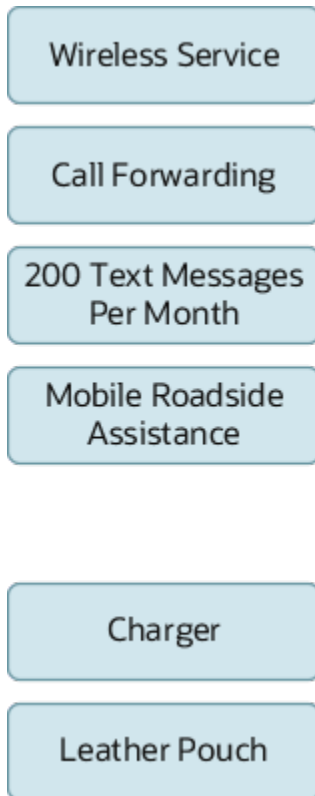
Create a Bundle Offer

You can create bundle offers using simple product offers. A bundle refers to a logical grouping of items that can be sold.

Here's a pictorial representation of a bundle offer where a Package is a bundle offer comprising of two bundles called Wireless Service Bundle and Device Bundle. The Wireless Service Bundle comprises of Wireless Service, Call Forwarding, 200 Text Messages Per Month, and Mobile Roadside Assistance. The Device Bundle comprises of simple product offers, Charger and Leather Pouch.
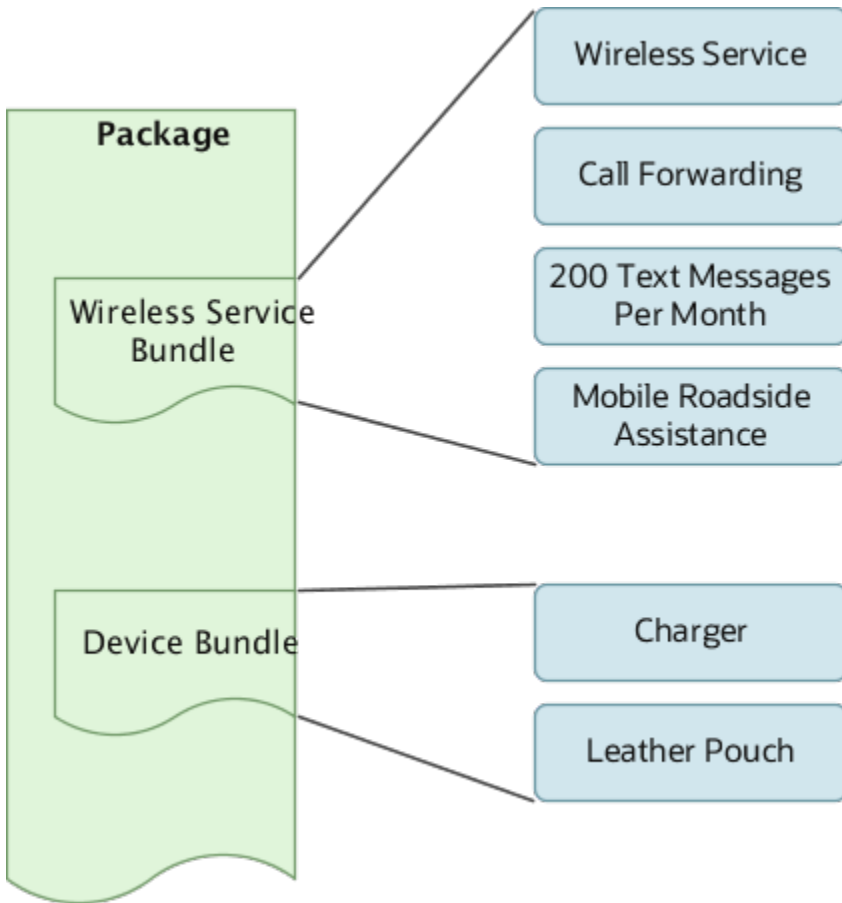
To create a bundle offer, use the product offer guided flow where you specify the offer type as a service bundle, package, or commercial bundle.

When you create a bundle offer of type service, you must associate a product specification which has a primary or an auxiliary service specification associated to it. This helps you instantiate the service associated to the bundle offer at run-time.

For any simple offer of non-service type such as a device or an accessory, you can associate a service specification. You can have multiple service bundles inside a nested service bundle, where each service bundle has a primary association to a service specification. You can't associate a commercial bundle to a product specification.

Here's an example of a service bundle.

Offer ID	Offer Type	Name	Associated Product Specification	Associated Service Specification	Relationship
S1	Simple service	640KBPS Business Broadband Connect	Business Broadband Feature Product Specification	Business Broadband Features Service Specification	Auxiliary
S2	Simple service	E-mail	Business Broadband E-mail Product Specification	Business Broadband E-mail Service Specification	Primary

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Offer ID	Offer Type	Name	Associated Product Specification	Associated Service Specification	Relationship
D1	Simple service	Router	Business Broadband Router Product Specification	Business Broadband Router Service Specification	Primary
SB1	Service bundle	Business Broadband Connect Service	Business Broadband Feature Product Specification	Business Broadband Features Service Specification	Primary

You may keep in mind that you can't change the base price of simple product offers from within the bundle offer because bundle product offers are only a collection of simple product offers.

Create an Offer Aggregation

To create an offer aggregation:

1. On the Components page, click **Create Aggregation**.
2. Provide a name and description.
3. From User Option Selection, select either Product Lines or Product Specifications.
4. Click **Create**.

After you have created an aggregation, you can also edit and remove the aggregation that you just created.

> **Note:** Offer aggregation is supported only on new package offering and not on Commercial and Service bundles.

Create Product Option Groups

To create an option group:

1. On the Components page, click **Add Offerings**.
2. On the Select Available Offers page, search for the offers that you want to add and click **Add.** The Selected Offers now appear in the Clubbed Offers page. You need to select a minimum of 2 product offers to create a product option group.
3. On selecting the offers, the **Create Option Group** option appears.
4. Click **Create Option Group**.
5. On the New Option Group page, provide a name for the option group.
6. Provide a description.
7. From the User Option Selection, either select **Select One** or **Select One or None**.
8. From the Default drop-down list, select a default value for the option group.
9. Click **Create**.

Manage Offer Approvals

You can use the preconfigured approval flow in Launch to run your offers past the approvers within your resource organization.

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The approval flow for an offer traverses up through the resource hierarchy where the default approver is the reporting manager; however, you can override this default approver when confirming the offer design.

> **Note:** The Initiative associated with the offer must be configured for approvals for the approval process to run.

Here's the high-level approval flow for offers:

1. While confirming the offer design, you are prompted to either override the default approver or submit the offer to the default approver. After you click **Submit**, the offer moves to the `Design Complete` status.
2. To trigger the approval process, go to the Initiatives landing page, click **Confirm** for the associated initiative, and then click **Initiate Approvals**. This action sends email notifications to the approvers.
3. The approvers must view the offer that requires approval and approve (or reject) the request on the UI itself and optionally provide the supporting comments.

Configure Approvals

Use the profile options to configure the type of approval and the criteria for the completion of an approval depending on the approval type.

The following profile options are available to configure approvals:

Profile Option	Description and Values	Is Mandatory?
ORA_ATC_LAUNCH_APPROVAL_TYPE	Defines the approval type for offers. The default is parallel. • Parallel • Sequential **Note:** If you define the approval type as sequential, you must not override the default approver during offer confirmation. Doing so will change the approval type to parallel.	No
ORA_ATC_LAUNCH_APPROVAL_VOTE_ PERCENTAGE	The percentage range is between 0 and 100. Defines the voting percentage required to mark the request as approved during parallel approvals. The default is 100 percent, which means all approvals are required.	No

Remember that these profile options would work only if the associated initiative is configured for approvals.

An approval type can be sequential or parallel. As the name suggests, a parallel approval is when the designated approvers of an offer can simultaneously approve the offer. In this type of approval, you can also define the voting percentage required to move an offer to the next stage. For example, if you configure the voting percentage as 50 percent, only half of the specified approvers are required to approve an offer.

In a sequential approval flow, an approvals must happen in a queue wherein the previous approver must approve before the next approver receives the email notification. This is similar to any organization hierarchy where the immediate next approver is the line manager and then the approvals move up the management chain.

Here are some considerations while working with offer approvals:

- You can't edit an offer that's in the approval stage. Offers in approvals stage have an interim status of Approvals Pending. You can see this status when you view an offer that requires an approval.

- Offers that do not require approvals directly move from Design Complete to Ready to Publish status when you confirm the offer design

- If you change the default approver in a sequential approval process, the type of approval reverts to the default approval type of parallel approval. This is because you would be changing the default resource hierarchy for a resource.

- You can define multiple overriding approvers for an offer but there can be only one default approver.

Related Topics
- Manage Entity Lifecycle Using Initiatives
- Publish Initiatives to Spoke Systems

Manage Product Offers

Use this topic to understand how you perform simple operations on offers from the landing page.

Use the ellipses menu on the landing page to do one or more of the following for each offer depending on the lifecycle status of the offer:

- Search product offers
- Edit product offers
- Confirm product offers
- Revise product offers
- Retire product offers
- Clone product offers
- View references

Additionally, you can do the following:

- Manage audit configurations
- Compare offerings

Tip: Before you make changes to a product specification or offer, use View references to review the impact to entities that may be referencing the specification or offer.

Search Product Offers

You can search product offers from the product offers landing pages, and view product offers based on your search results. You can view your product offers at a glance through the grid or the list view, or you can also get in into the offer to view more details. Depending on the lifecycle status you can either view or edit the offer.

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Edit Product Offers

You can edit your product offers depending on the lifecycle status the offer is in.

Confirm Product Offers

You confirm product offers or initiatives to mark the completion of design or testing and move them to a test environment or launch the offer. Once you confirm In Design or In Test product offers or initiatives, then all its entities are moved to the Ready to Publish status. This is an intermediate status. When you publish an initiative, then all its entities are promoted to test or production environment, depending on their previous status.

You can confirm an offer only when it's in the In design or In test statuses.

Revise Product Offers

You can revise your product offers that are in Launched status. When you select Revise from the actions menu, you're taken to the Edit Offer guided flow. You can make modifications to the available information and save the product offer. Ensure that you associate your product offer with an initiative. The previous association is lost when you launch an offer. When you save your product offer, its version changes and it's saved in the In design status.

Retire and Obsolete Product Offers

You can retire your product offers that are in the Launched status. If there are any versions of your product offer in In Design, Test, or Active status, then you won't be provided with the Retire option. When you select Retire from the Actions menu, you're taken to the Retire Offer page. Associate your product offer with an initiative and save. At this stage, your product offer moves to the Awaiting Retirement status and you can't make updates to your offer. When you publish the associated initiative, your product offer is retired. Once a product offer is retired, this product offer isn't available for purchase anymore, through any channels.

You can obsolete your product offers that are in Retired status. If there are any versions of your product offer in launched status, then you won't be presented with the obsolete option.

Clone Product Offers

You can use the Clone functionality to let the application recreate the offer from an existing offer. For example, if you want to create a bundle offer that reuses a lot of components that are existing in the application, you need not create the offer from scratch. You can clone an offer, edit that offer to add or remove components, alter price, and update the rules.

View References

This options enables you to view the entities that may be referencing an offer. Viewing references helps you assess the effect that your actions might have on the related entities and can help prevent the proliferation of offers.

Manage Audit Configuration

Using audits on product offerings, you can specify and capture detailed historical information the date and time of an action taken, the changes made to the product offer, and the identity of the person making the changes. You can download the audit logs.

You can configure audits using the **Audit Trails** card on the Administration page.

Compare Offerings

You can compare two different product offers or two versions of the same offer using offer comparison. You can do this from **Actions** > **Compare Product Offerings** in the Offerings work area.

Note: Comparing prices for bundled offers is not supported.

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9 Product Offer Pricing

Pricing Overview

Use this topic to understand the various pricing structures available to you when you create simple and bundle offers.

To begin with, you can set up your price lists, set up simple prices for offers, and go about enhancing your pricing strategy by applying advanced prices.

Unlike simple offers where you can add and alter prices, for a bundle offer the pricing section displays the preset prices of the individual simple product offers and also the rolled-up prices at the bundle level. It only enables you to alter prices. Additionally, you can also set commitment terms for your price plans to manage your product offer prices. You can also provide device programs for lease and installments by setting up different pricing structures for your customers.

Read the remaining sections in this chapter to understand how you set up pricing in the Launch application.

Pricing Structures

Use this topic to understand the pricing structure in the Launch application.

Price List

A price list is a set of standard prices for products and services. You can use multiple price lists to offer different prices for the same product as well as specify a price list. The price list specifies a price and the currency for that price. For example, you can use separate price lists to charge business customers 30USD a month for internet service and charge residential customers 50USD a month for the same service.

You can use multiple price lists to offer different prices in different market segments (such as consumer or business customers, as stated in the earlier example), with different currencies, through different sales channels (such as products purchased online or at a store), and to different geographic locations.

You can define the type attribution for a price list based on customer segment, location, or any logical extensible value. For example a price list type can be residential, business, and so on.

As a product administrator, you can create a price list so that it can be used in both simple or bundle offers. Additionally, you can also look at all the simple or bundle offers associated to a price list. As a pricing specialist, you can remove your offer from a price list so that it no longer appears on the price list's list of offers. As a marketing product manager, while editing an offer, you can modify the price items on the price list.

As a marketing manager, while creating or editing a simple or bundle offer, you can view existing price lists, select a new price list, edit or delete an existing price list, so that the offer appears with the specified price on the selected price list.

Simple Pricing Types

Other than price lists, there are simple and advanced price types available to you. You can use the existing price lists while creating simple or advanced pricing types.

Here are some of the simple price types:

- **One-Time Fee:** This is a nonrecurring charge, such as setup or cancellation fees. You purchase a broadband plan and it incurs a one-time setup fee of $100.

- **Recurring Fee:** These are ongoing charges that aren't generated or affected by usage, such as a monthly subscription fee. You set up this fee to recur automatically based on the frequency of recurrence. For example, a $10 monthly subscription fee.

- **Usage Fee:** These are charges for the use of a service, such as telephone calls or data usage. Usage fee is measured by the metering rule. You add usage specifications through REST APIs and while creating an offer, associate a usage specification and service specification with the product specification and specify a metering rule. For example you can set up price of $50 for 100 GB of data usage.

- **Existing Price Plan:** A price plan specifies how to calculate the cost of a price type configured. It has the price model, price constraints, and rules which determine the actual price. You can reuse any of your existing price plans supporting different price models across simple offers, instead of creating price plans every time you create an offer. Reusing price plans gives you the ability to perform bulk or mass update to prices.

  Here's an example. Let's consider a price plan monthly subscription fee of 100$ which has a General Ledger Identifier and tax code, and is used in a mobile offer. Based on business requirements, the same monthly subscription fee could be reused in the mobile data offer. If you make a change from 100$ to 200$ in one of the price plans, both the offers will reflect the new price.

  Additionally, after you have created a price plan, which also includes your financial information, you can reuse any of your existing price plans across simple offers, instead of creating price plans every time you create an offer. When you update a specific existing price plan, you perform bulk updates for pricing across offers, which use the same price plan. This helps you make updates across offers without needing you to revisit individual price plans.

  As a product administrator, you can also create and define currency and noncurrency balance elements through API and use noncurrency balance elements to specify the allowance for a specific price. As a pricing specialist, you can use the desired balance elements while specifying the prices for your offer. For your price lists, you can specify the currency type, ISO codes, currency symbols, rounding mode, and decimal points, whereas for prices of your offers you could define the allowance types. Additionally, you can also define the consumption rules for the balance elements.

Here are a few examples of different simple pricing schemes:

Pricing Scheme	Example
Fixed subscription pricing	- 9 monthly for unlimited subscription - $15 for 100 GB mail box
Usage charges for any units of measure	- $1.99 per MB of consumed data
Nonservice based charges	- $10 purchase fee - $20 setup fee
Physical good pricing with discounts	- 128 GB variant of phone - $100 with 10% discount
Fixed subscription with discounts	- $50 monthly with $1 discount

Pricing Scheme	Example
Usage charges with discounts	• $1.99 per MB of consumed data with $0.1 discount
Termination charges	• 10% flat fee or balance of contract

Advanced Pricing Types

Here are the advanced pricing types available to you:

- Allowance
- Volume
- Tiered
- Attribute-based pricing

Attribute-Based Pricing

Attribute-based pricing is a combination of characteristics to formulate a price. As a pricing specialist, you can price a simple offer based on the combination of attributes or characteristics of its usage specification, product specification, customer profile specification which gives flexibility for dynamic pricing and prevents product proliferation.

Attribute-based pricing is where the price of a charge on a product offer is determined by rules which are the enumerated values of one or more attributes applied on an offer through its usage specification, product specification or custom profile characteristics. In a simple scenario, the price is based on a single attribute. For example, a recurring charge for a bandwidth product could be priced based on the bandwidth value, such as 50$ for 5 MBPS, 75$ for 10 MBPS, and so on.

In a complex scenario, the price of a charge is based on more than one attribute, where the attributes may be based on different characteristics. For example, the price of a recurring charge for a bandwidth product could be priced based on the bandwidth value in conjunction with the geographic location of the network service and the customer profile characteristics. Attribute-based pricing is provided based on specific attributes of a service specification, customer profile specification, or usage specification or a combination of the specifications. However, you can use usage specification only if the usage fee is used for the attribute pricing, while customer specification profile, product specification profile, and service specification can be used for other pricing structures, such as one-time or recurring fees.

Here's an example of a combination of customer specification profile and service specification attributes:

Customer Profile: Customer Type	Product Specification Bandwidth	Price	Allowance	Price Format
Platinum	10 MBPS	100$	20 GB	Per unit or fixed price
Gold	10 MBPS	100$	30 GB	Per unit or fixed price
Platinum	20 MBPS	1500$	40 GB	Per unit or fixed price

Here's an example of a combination of usage specification attributes:

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Usage Specification: Call Origin	Usage Specification: Call Destination	Price	Price Format
India	US	1$	Per unit or fixed price
India	ROW	0.9$	Per unit or fixed price

Attribute-based pricing with Allowances

Additionally, you can also add allowances with attribute-based pricing, based on a combination of customer profile specification, and service specification. Here's an example, where monthly allowances are provided:

Bandwidth	Customer Type	Price	Allowance
10 MBPS	Gold	100$	10 GB per month
10 MBPS	Silver	120$	8GB per month
20 MBPS	Gold	130$	10 GB per month
20 MBPS	Silver	140$	8GB per month
-	-	299$	-

Here are a few examples of advanced pricing:

Pricing Scheme	Example
Fixed allowance subscription pricing	• $50 monthly for up to 10 GB mobile data
Attribute-based pricing	• You define a 128 GB variant phone to be priced at $250 and a 256 GB variant to be priced at $400.
Fixed allowance with overage	• Overage is charged at a rate of $1 for every 15 minutes increment
Tiered and volume subscription pricing	• $29 monthly for up to 10 accounts • $25 for 10 to 100 accounts • $23 there after
Multi-dimensional attribute-based pricing	• 128 GB phone- $100 • 256 GB phone- $123
Tiered usage pricing	• $1 for first 10 GB • $1.2 for 10 GB to 20 GB • $2 thereafter

Pricing Scheme	Example
Tiered and volume discounts	• $0.10 discount for 1-10 movies • $0.20 discount for 11-20 movies
Effective date based pricing	• $10 for Jan 1st to Mar 31st • $11 from April 1st onward

> **Note:** Irrespective of the pricing structure that you use, simple pricing or advanced pricing, you could specify your tax codes and indicate whether your price is either inclusive or exclusive of tax. Tax codes are used by taxation systems for billing. You can have vendor-specific tax codes or simple tax codes. If you choose to use tax codes, you must load your tax codes using REST APIs and use it in the price plans.

Price Plans with Commitment Period

You can set up price plans with commitment terms for atomic offers of type service and bundle offers of type commercial, service, and package. Setting up price plans with commitment terms enables you to avoid proliferation of offers every time you want to set different prices for different commitment terms in your offer. You begin by creating a price for your offer on the pricing train stop.

The next step is to create a commitment term. A commitment term is a condition in which the product offer is sold to a customer. For example, you can set a two-year commitment period for a product offer. This effectively means that when you sell this offer, the customer has committed to this offer for a period of two years. The commitment may or may not be absolute. You can also provide early termination options for an easier exit route for the customer. Alternatively, you can set up penalty for early termination with the following options:

- None

- Flat: A flat fee, such as 100 US dollars or 75 euros.

- Fixed Proration: A flat termination fee for a contract duration with proration percentage penalty for each remaining month in the contract. The system calculates and evenly spreads the penalty percentage across the contract duration.

- Variable Proration: A flat termination fee with different proration percentages for different periods of time within the contract duration.

- Balance of Contract: The balance remaining in the customer's contract.

Here's an example of Fixed Proration. Consider that you have a wireless voice service that has a contract period of 24 months and you set a proration termination penalty of 400$. Then the application determines a 4.17% penalty per month (100/24 = 4.1666%). If a subscriber terminates the service in 14 months with 10 months left in the contract period then he has to pay a prorated penalty of 10 x 4.17% x $400 = $166.80.

Here's an example of Variable Proration. Consider that you have a wireless voice service that has a contract period of 24 months and total penalty of 400$. And you set a variable proration penalty for different periods as follows, cancelling the subscription in the months 1 to 8 carries a penalty of 10%, months 9 to 12 carries a penalty of 5%, and no penalty after 12 months. A subscriber cancelling the subscription 4 months into the contract will incur a termination fee of $400 – 4x10%x400 = 260$.

Here's an example of balance remaining in the customer's contract. A customer with a one-year commitment period with a $50 monthly fee would pay a penalty of $50 for each month remaining in the contract. A customer canceling with 5 months remaining would pay $250, and a customer canceling with 3 months remaining would pay $150.

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After you have set up your commitment term, you can associate it to a price list and use it for your offer. Components in a package bundle can have their own commitment terms but can be overridden to fit the pricing and commitment needs of the package

For simple offers: As a product manager, you can create, edit, and associate multiple commitment terms for an atomic service offer from the pricing train stop. As a pricing specialist, you can set up different prices for each of the commitment terms configured on the offer instead of creating multiple offerings for each commitment term period. Additionally, you can also set one of the terms as a default price term. Here's an example:

Commitment Term	One-Time Charge	Recurring Charge	Usage Charge
12 Months (default)	100	150	1$ per unit
6 Months	190	200	2$ per unit

Additionally, you can also define a no terms price. The no terms price is used when there is no commitment period for an offer and you pay as you go for the service. You can define no terms in both atomic and bundle offers. For example,

Commitment Term	Subscription Charge	Purchase fee
2 Year Term	10 USD	100 USD
No Terms	5 USD	100 USD

For bundle offers: As a product manager, you can create, edit, and associate multiple commitment terms for a bundle offer. For each of the simple offers used in the bundle offer, the terms and the prices defined in the simple offer pricing train stop is used. If you choose to, you can specify a term period for the bundle offer and based on the term that matches the simple offer, the bundle price gets determined. When the bundle price tenure doesn't match the atomic offer prices used in the bundle offer, and if you have set the no term price as the default, then the default price is used as the price for the bundle offer. Here's an example:

1. Product manager creates Offer A with 6 months and 12 months commitment terms; where default is the 6 month commitment term.
2. Product manager creates Offer B with 6 months commitment terms, as default.
3. Product manager creates Bundle AB with Offer A and Offer B.
4. Product manager modifies prices for specific or all price types.

Offer A:

Commitment Term	One-Time Charge	Recurring Charge	Usage Charge
12 Months	100	150	1$ per unit
6 Months (default)	190	200	2$ per unit

Offer B:

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Commitment Term	One-Time Charge	Recurring Charge	Usage Charge
6 Months (default)	190	200	2$ per unit

Bundle AB (6 month commitment term default): Here the default term price is used as there is no 12 months tenure.

Offer Components	Commitment Terms	One-Time Charge	Recurring Charge	Usage Charge
Offer AB	-	380	400	-
Offer A	6 month term	190	200	2$ per unit
Offer B	6 month term	190	200	2$ per unit

Bundle AB (12 month commitment term):

Offer Components	Commitment Terms	One-Time Charge	Recurring Charge	Usage Charge
Offer AB		290	350	-
Offer A	12 month term	100	150	2$ per unit
Offer B	6 month term (product manager chooses 6 month term price to apply for 12 month term at bundle level)	190	200	2$ per unit

Alteration cases in bundle AB for a 12 month commitment term.

Offer Components	Commitment Terms	One-Time Charge	Recurring Charge	Usage Charge
Offer AB		280	349	-
Offer A	12 month term	100 (10% discount)	150	2$ per unit
Offer B	6 month term (user chooses 6 month term price to apply for 12 month term at bundle level)	190	200 (1$ discount)	2$ per unit

Alter Prices

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You can alter prices for your bundle offers and if required specify the price type to which the discount or markup amount is applied. When you can perform bundle-level alteration at service bundle, package, or commercial bundle, you can specify the particular price type to which the alteration must apply.

Here are the different ways you can alter price:

- **Discount amount and percent:** You can apply a discount to price. The discount can be an absolute or a percent of the original price. For example, if the original price was $100, and you applied a discount of $10, then the adjusted price would be $90. Similarly at the 5% discount, the adjusted price would be $95.

- **Markup amount and percent:** You can inflate the price by an absolute amount or percentage value. For example, if the original price was $100, and you applied a markup of $10, then the adjusted price would be $110. Similarly, if you applied a markup percent of 5%, the adjusted price would be $105.

- **Price override**: You can override the price by an absolute value. This amount becomes the adjusted price. This is applicable only for bundle product offer. You can also use price override on the components of a bundled or simple product offering.

You can use relative effectivity of price to manage scenarios such as offering zero charge for the first three months and then applying monthly fee in a product offering. You can use this option when defining price alterations for atomic offers.

You can also make these alterations limited for a period of time. In this scenario the alterations or discounts that you apply to the base price is only applicable for the duration that you define. Outside of this period, the regular base price without the alterations are applied. The date for these alterations can be a calendar date, relative to the purchase date, or relative to the activation date.

You can also reuse the existing price alterations on atomic offers to avoid price proliferation.

Device Programs

You can use device programs to offer alternatives to your customers instead of making them pay full prices for the devices. Device programs that you can offer to your customers include Installment Plans and Leasing Options. See *Device Trade In* for more information.

Lease

The Lease device program enables your customers to own the latest devices and accessories at lower upfront cost using lease plans. They can use a device for the lease term period in exchange for a monthly equipment rental fee. As a product manager, for a device or accessory offer type, you can provide lease plans with an agreement and specify the lease terms that includes the return checklist for devices and accessories. You can set up a lease plan with a recurring fee. You can set up several leasing plans, based on duration, or terms. See *Set Up Lease Plan* for information on setting up Lease.

As a catalog administrator, you can create the return checklist template to support the return of leased devices and accessories. The template should include criteria to determine the working condition of the leased device, tasks to be performed by the subscriber before returning the device, and instructions to ship the device or return it to a store.

Installments

The installment device program enables you to provide payment alternatives to your customers. As a product manager, for a device offer, you can provide installment plans, with multiple installment terms, set prices, specify the credit approval and minimum down payment, and decide if the plan is inclusive or exclusive of tax. You can also set the default terms as well as the upgrade rules for a plan.

You can set an installment agreement against a one-time purchase fee. You can also configure any advanced pricing, such as attribute-based pricing, that may be required for down payment or monthly installments. The attribute-based

selector in the attribute-based pricing section enables you to define different installment plans based on tenure, for the various entities that you choose to configure.

As a product manager, while creating a device installment plan you can specify the qualifiers such as customer type, loyalty tier, credit score, or rewards membership of customers to define their eligibility. For example, you can have a North American operator to model the installment plans based on credit score and an APAC operator to model the installment plan based on loyalty tier. See *Set Up Installment Plan* for information on setting up Installments.

Real-Time Pricing Scenarios and Setup

Here are a few pricing scenarios elaborated with setups.

Simple product offering with volume discount

Set up a home sensor and camera system with one-time fee and volume discount. The more the number of home sensors you buy you get volume discount on your one-time fee.

Minimum Quantity	Maximum Quantity	Discount
5	10	10%
11	20	20%
21	30	30%

Simple product offering with tiered pricing

Set up a wireless data offer with usage fee and tiered pricing. The usage is measured in minutes of voice call.

Tier	Minimum Quantity	Maximum Quantity	Price
1	0.00	5.00	$1.00
2	5.00	10.00	$0.50
3	10.00	Unlimited	$0.10

Product offering allowances

Set up a 10 GB data pack.

You must set up a recurring allowance with a one-time fee of $10 and an allowance fee of $100 with 10 GB data per month.

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Product offer with effective date

Set up a home sensor and camera system with one-time fee and volumes discount that's driven by effective dates.

Effective Period: April 01, 2020 to June 30, 2020

Minimum Quantity	Maximum Quantity	Discount
5	10	10%
10	20	20%
20	30	30%

Effective Period: July 01, 2020 to unlimited

Minimum Quantity	Maximum Quantity	Discount
5	10	1%
10	20	2%
20	30	3%

Tiered pricing with effective dates

Set up a wireless data offer with usage fee and simple tiered pricing. The usage is measured in minutes of voice call.

Effective Period: April 01, 2020 to June 30, 2020

Tier	Minimum Quantity	Maximum Quantity	Price
1	0.00	5.00	$1.00
2	5.00	10.00	$0.50
3	10.00	Unlimited	$0.10

Effective Period: July 01, 2020 to unlimited

Tier	Minimum Quantity	Maximum Quantity	Price
1	0.00	5.00	$2.00

Tier	Minimum Quantity	Maximum Quantity	Price
2	5.00	10.00	$1.50
3	10.00	Unlimited	$1.10

Set Up Simple Prices

These are the different prices you can set up for your simple offer:

- One-Time Fee
- Recurring Fee
- Usage Fee
- Existing Price Plans

Set Up One-Time Fee

Here's how you set up one-time fee

1. Click **Add Fee** and select **One-Time Fee** from the drop-down list.
2. On the New One-Time Fee page, enter your fee name and ID.
3. In the Price Information section, specify the price type as Purchase or Penalty, select a price list, and the one-time price.
4. In the Financial Information section, select the general ledger ID, tax code, and specify whether tax is included.
5. In the Price alterations section, click **Add Price Alterations** if you choose to apply price alterations. The alterations available to you are: Fixed Discount, Percentage Discount, Volume Discount, Tiered Discount, Fixed Markup, Percentage Markup.
6. Click **Save**

Here's an example of a one-time entry fee of $100. You can set it up as:

Name	Price
Initial Setup Fee	10

Set Up Recurring Fee

Her's how you set up recurring fee:

1. Click **Add Price** and select **Recurring Fee** from the drop-down list.
2. On the New Recurring Fee page, enter your fee name and ID.
3. In the Price Information section, select a price list, select the period, and the recurring price.
4. In the Financial Information section, select the general ledger ID, tax code, and specify whether tax is included.

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5. In the Price Alterations section, click **Add Price Alterations** if you choose to apply price alterations. You can reuse the existing price alterations on atomic offers to avoid price proliferation.
6. Click **Save**

Here's an example of a recurring monthly subscription fee of $10 per month. You can set it up as:

Name	Price	Period
Monthly Subscription Fee	10	Month

Set Up Usage Fee

Here's how you set up usage fee:

1. Click **Add Price** and select **Usage Fee** from the drop-down list.
2. On the New Usage Fee page, enter your fee name and ID.
3. In the Price Information section, select a price list, specify the UOM, price format, and the usage price. Depending on what you selected as the price format, this is either a fixed price or price based on the unit of measure.
4. In the Financial Information section, select the general ledger ID, tax code, and specify whether tax is included.
5. In the Price Alterations section, click **Add Price Alterations** if you choose to apply price alterations. You can reuse the existing price alterations on atomic offers to avoid price proliferation.
6. Click **Save**

Here's an example if your plan charges $0.10, per minute of call. You can set it up as:

Name	UOM	Price	Price Format
Per Minute Call	Minute	0.10	Per Unit

Existing Price Plans

A price plan specifies how to calculate the cost of a price type configured. It has the price model, price constraints, and rules which determine the actual price. You can reuse any of your existing price plans supporting different price models across simple offers, instead of creating price plans every time you create an offer.

When you search for a price plan, the results are based on the product type that you select. Here's how you can go about it. On the Pricing page:

1. Click **Add Price** and select **Include Existing Fee** from the drop-down list
2. On the Add Existing Fees page, search for an existing price plan or select a price plan from the available list.
3. Click **Add**.

Set Up Advanced Prices

These are the different advanced prices you can set up:

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- Allowance

- Volume

- Tiered

- Attribute-Based Pricing

Set Up Allowance Prices

The non currency balance element represents the allowances that can be configured in a simple offer. Based on your business needs you need to identify the allowances types and create the respective non currency balance elements for these allowance types. For example, free minutes as an allowance type needs to be configured as a non currency balance element.

You can create and manage your balance element using REST APIs. See REST APIs for Launch on My Oracle Support, *Doc ID 2725039.1*.

You can set up your allowances once you have created your simple price structure. The final price is calculated taking these allowances into considerations. You must select the one-time fee to which you need to apply advanced prices.

1. From the Advanced Pricing Model drop-down list, select **Allowance**.
2. In the Allowance section, select the allowance type.
3. Enable the Share Allowance option, if you choose to share your allowance.

   Note: You can configure an overage only for an allowance by using the Apply Overage option. Enable this option, if you choose to apply overage to the price.

4. Specify the start and end dates, allowance quantity, period quantity, period units, and click the tick icon.
5. Click **Save**.

Your allowance is now created and displayed in the allowance section on the Price page.

Set Up Volume Prices

You can set up your volume pricing once you have created your simple price structure. You must select the one-time fee to which you need to apply advanced prices.

1. From the Advanced Pricing Model drop-down list, select **Volume**.
2. In the Volume Pricing Ranges section, specify the start and end dates, name, minimum quantity, maximum quantity, price, price format, and click the tick icon.
3. Click **Add Range**, if you want to add more volume prices.
4. Click **Save**.

Your volume prices are now created and displayed in the Volume Pricing Ranges section.

Set Up Tiered Prices

You can set up your tiered prices after you have created your simple price structure.

1. From the Advanced Pricing Model drop-down list, select **Tiered**.

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2. In the Tiered Pricing Ranges section, specify the start and end dates, name, minimum and maximum quantity, price, price format, and click the tick icon.

   If you set up a period, then the tier is effective in that period. By default, the tier is effective for the duration of the product offer. Also, if you select fixed fee, then the price is constant for the tier. If you select per unit, then price is calculated, based on the consumption of units in the tier.

3. Click **Add Range**, if you want to add more tiers.

Your tier is now created and displayed in the Tiered Pricing Ranges section.

Set Up Attribute-Based Pricing

You can set up your attribute-based prices when you are creating your simple price structure.

when you are creating your simple price structure.

1. From the Advanced Pricing Model drop-down list, select Attribute-Based.
   a. In the Attribute-Based Pricing section, enter a pricing model name, description, and select the entity specifications, for example, Product Specification, Usage Specification, Service Specification, or Customer Profile Specification.
   b. Specify the allowance details, and the start and end date.
2. Enable the **Share Allowance** option, if you choose to share the allowance, and specify the allowance type. You will be asked to specify the allowance quantity, allowance duration, and period units when you add the attribute based price for all the variants you include for pricing.
3. To apply overage, enable the **Apply Overage** option and specify the overage price format. You will be asked to specify the overage price when you add when you add the attribute based price for all the variants you include for pricing.
4. Click **Add Attribute-Based Price**.
   o Select the variant attribute for which you are specifying the price from either the SKU Template drop-down list or any other attribute that makes a variant with a different price. This would be a combination of characteristics that uniquely identifies the variant for which you want to set the price.
   o Specify the attribute details of the variant, such as brand, price tag, price format, and price.
   o If you enabled share allowance, then specify the allowance quantity, allowance duration, and period units.
   o If you enabled overage, then specify the overage price.
   o Click **Add**.

   To add attribute based prices for more variants repeat this step.
5. Click **Save**.

Set Up Price Alterations

Here you can add volume discount, fixed discount, percentage discount, tiered discount, fixed markup amount, percentage markup amount, and attribute based alterations to the prices that you have set up.

In attribute based alterations you can apply discounts based on the attributes of the atomic product and also specify rules when the adjustments and alterations apply. For example, customers of type gold class get a 10% discount on a specific device variant in the month of June. Another example, a device variant with the color attribute as red gets a 5% discount.

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Set Up Price Alterations for atomic offers

The following discount and markup options are available:

- **Fixed discount:** A fixed amount is deducted from the base price.
- **Percentage discount:** An amount equivalent to the percentage is deducted from the base price.
- **Volume discount:** A specific amount is deducted for a range of values. You can also add a simple or a tiered volume discount.
- **Fixed markup amount:** A fixed amount is added to the base price.
- **Percentage markup amount:** An amount equivalent to the percentage is added to the base price.
- **Attribute-based alteration**: Specify the discounts and limit the discounts applied based on the product attributes selected and you can apply rules to decide when the discounts apply. The attributes can come from product specification, service specification, usage specification, custom specification , and customer profile specification.
- **Price override**: The adjustment value is used as the price, overriding the original price. All other prices and adjustments are ignored.

As a marketing manager, irrespective of the price alteration type that you use, fixed or markup, you could specify your General Ledger ID and tax codes and indicate whether your discount or markup is either inclusive or exclusive of tax. If you choose to use tax codes, you must load your tax codes using REST APIs and use it in the price alterations. This helps the billing system to take care of the taxation and accounting.

To specify either a fixed or percentage discount:

1. Go to the Price alterations section of the fee type.
2. From the **Add Price Alterations** drop-down list, select either **Fixed Discount** or **Percentage Discount**, depending on your discount type.
3. Enter the following information:
   a. Enter the discount amount or discount percentage.
   b. Enter a start date and end date.
   c. Select a General Ledger ID and Tax Code from the respective drop-down lists.
   d. Enable or disable the Tax Included option.
   e. Click **Add**.

To specify a volume or a tiered discount:

1. Go to the Price alterations section of the fee type.
2. From the Add Price Alterations drop-down list, click either **Add Tiered Discount** or **Add Volume Discount**, depending on your discount type.
3. In the Add Volume Discount or the Add Tiered Discount section, enter the following information:
   a. Enter effective start and end dates. If you set up a period, then the tier is effective in that period. By default, the tier is effective for the duration of the product offer.
   b. Select a General Ledger ID and Tax Code from the respective drop-down lists.
   c. Enable or disable the Tax Included option.
   d. In the Range section, specify a name, minimum quantity, maximum quantity, discount amount, price format, and click the tick icon.
   e. To add more rows, click **Add Range**.
   f. Click **Add**.

To specify either a fixed markup or a percentage markup:

1. Go to the Price alterations section of the fee type.
2. From the Add Price Alterations drop-down list, click either **Fixed Markup** or **Percentage Markup**, depending on your markup type.
3. Enter the following information:

   a. Enter the markup amount or markup percentage.
   b. Enter a start date and end date.
   c. Select a General Ledger ID and Tax Code from the respective drop-down lists.
   d. Enable or disable the Tax Included option.
   e. Click **Add**.

To specify an attribute based alteration:

1. Go to the Price alterations section of the fee type.
2. From the **Add Price Alterations** drop-down list, select **Attribute-based Alteration**.
3. In the **Identifying information** section:
   a. Provide the name, ID, and description.
   b. Select the attributes you want to base the price alteration on. You can select from these specifications: product, service, usage, customer profile, and custom profile.
4. In the **Attribute-based Alteration** section:
   a. Click **Attribute-based Alteration**.
   b. Select the operator you want to apply to each of the selected attribute.
   c. Click **Add**, the alteration row displays.
   d. Specify the attribute values, the adjustment type and amount, and click **Save**.
      - To add more attribute based alterations repeat steps c and d.
5. In the **Effective Period** section, specify the start and end dates for the alteration and when to apply the alteration.
6. In the **Financial Information** section, specify the general ledger ID and tax code from the respective drop-down lists.
7. Click **Add**.

Set Up Price Alterations for bundle offers

Here you can add fixed discount, percentage discount, fixed markup amount, and percentage markup amount to the prices that you have set up. Bundle price alterations are done at the package level or individual fee level. At feel level all four options are available. At the package level, you only have a percentage discount and percentage markup. Here you can apply the alteration for a particular fee type one-time, recurring, usage, or all. In case you apply a discount to the one-time fee at the package level then this discount is applied to all one-time fees and percolates to the levels below.

The following discount and markup options are available:

- **Fixed discount**: A fixed amount is deducted from the base price.

- **Percentage discount**: An amount equivalent to the percentage is deducted from the base price.

- **Fixed markup amount**: A fixed amount is added to the base price.

- **Percentage markup amount**: An amount equivalent to the percentage is added to the base price.

As a marketing manager, irrespective of the price alteration type that you use, fixed or markup, you could specify your General Ledger ID and tax codes and indicate whether your discount or markup is either inclusive or exclusive of tax. If you choose to use tax codes, you must load your tax codes using REST APIs and use them.

Consider the following when you perform a price alteration:

- You can apply price alteration at the aggregate option level for a package.
- You can apply price alterations at the atomic offer's attribute-based price group level for service, commercial, or package bundles.
- You can apply price alterations at the service bundle level configured inside a package.
- You can apply price alterations at the atomic offer fee level inside a package.
- You cannot apply price alterations for an option group level that is part of a bundle, commercial, or package.

Note: Any alteration configured at the top level does not percolate down to sub-levels.

To specify either a fixed or percentage discount, or markup:

1. In the Price alterations section select the fee type: **One-time**, **Recurring**, **Usage**, or **ALL**. Then click the corresponding **Add {fee type} Price Alternation** button.

   Note: The bundle price roll-up happens based on the fee type you select.

2. From the **Add Price Alterations** drop-down list, specify your discount type or markup type.
3. Enter the following information:
   a. Enter the discount or markup amount, or discount or markup percentage.
   b. Enter a start date and end date.
   c. Select a **General Ledger ID** and **Tax Code** from the respective drop-down lists.
   d. Enable or disable the **Tax Included** option.
4. Click **Add**.

Set Up Price Plans with Commitment Period

You can set up price plans with commitment terms for atomic offers of type service and bundle offers of type commercial, service, and package.

You begin by creating a price plan for your offer.

The next step is to create a commitment term. To set up commitment terms:

1. From the Commitment Terms drop-down list, select Add Commitment Term.
2. On the New Commitment Term page, enter the name, commitment period and unit. The combination of these two fields define the commitment schedule, for example a commitment of 2 years, where the commitment period is 2 and the unit is years.

   Note: Steps 1 and 2 above apply to atomic offers. Steps 1 to 6 apply to bundle offers.

3. In the Termination section, optionally, enable the Allow termination option.

4. If you have enabled the early termination option, then you must configure the penalty associated with the termination.
5. Select the penalty type.
6. Optionally, add a grace period to the early termination rule. For example, if you configure a grace period of 2 weeks, then the customer won't be charged a penalty till 2 weeks post termination.
7. Click **Add**.

After you have set up your commitment term, you can associate it to a price list and use it for your offer.

Here's how you can associate price plans and commitment period for an atomic offer:

1. Select the ellipsis against the price list with which you want to associate the commitment term.
2. Click **Set Commitment Term**.
3. On the Set Terms for Price List dialog box, search and select the term that you want to associate your price list with.
4. Click **Add**. The commitment term now appears on the price list.
5. Click a specific commitment term to see the price associated to it.
6. Click the edit icon to modify the term price for a price roll up, as required.
7. Click **Save**.

The modified term price now appears for the price list.

Here's how you can associate price plans and commitment period for bundle offers:

1. Select the ellipsis against the price list.
2. Click **Set Commitment Term**.
3. On the Set Terms for Price List dialog box, search and select the term that you want to associate your price list with.
4. Click **Add**. The commitment term now appears on the price list.
5. Click a specific commitment term to see the price associated to it.
6. Click **View or Edit Alterations** to modify the term price for a price roll up, as required.

The modified term price now appears for the price list.

Set Up Lease Plan

You can set lease plans after you have set up the one-time fee for your device or accessory offer type for the configured price list. On the price list that you have created, select the lease option and perform the following steps:

1. Specify the lease term duration as fixed or the range of the lease term duration.
2. Specify the term information: name, lease deferred amount, down payment, number of payments, the frequency of payments and specify if the lease can be terminated earlier than the lease duration.

   Note: For devices with variants, the lease deferred amount, full price per unit, and down payment fields are presented in the **Attribute based lease information** section, with a separate row of lease payment information for each variant.

3. Specify the grace period duration and units of the duration.
4. In the **Attribute based lease information** section, each row represents the lease information for each variant of the device. Edit each variant and provide the lease deferred amount, down payment, and payment for each period.
5. In the **End of lease terms** section:

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      a. Specify the terms of returning the device.

      b. Specify the terms of continuing to lease the device.

      c. Specify the price of buying out the device at the end of the lease term.

6. If you want to allow upgrades, enable the **Allow Upgrade** option and specify the threshold conditions for an upgrade to be applicable:

      a. How the minimum threshold for upgrade must be measured.

      b. Minimum threshold for upgrade.

7. In the **Return checklist** section, click **Add Return Checklist** to select and attach your installment agreement.

8. In the **Lease agreement** section, click **Add Lease Agreement** to select and attach your installment agreement.

9. To add more lease terms, click **Add Term**. This option is not available for devices with variants

10. Click **Update**.

Set Up Installment Plan

You can set installment plans after you have set up the one-time fee for your device or accessory offer type.

You can create different variants of device installments with conditions, such as credit score, loyalty tier, rewards membership, and so on. You create an installment plan using the installment option in the created price list.

1. On the Installment Plans page, you specify the details including the tenure as a duration or a range having a minimum and maximum value, the frequency of payment, and so on depending on your business requirement.

2. If you have specified that the installment plan is eligible for upgrade, then specify:

      a. How the minimum threshold for upgrade must be measured.

      b. Minimum threshold for upgrade.

3. Attach your installment agreement and specify the name of the duration, number of installments, and select the tick icon.

4. Save the details.

Note: If you want to add additional qualifiers, you can do so using REST APIs for customer profile specification. Qualifiers are created as characteristics of a customer profile specification. See REST APIs for Launch on My Oracle Support, *Doc ID 2725039.1*.

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10 Promotions

Promotions Overview

Use this topic to understand what promotions are and how you create and manage them.

What's a Promotion

Promotions complements Product Offers and is created to provide additional awards, discounts, or reductions, to a customer who meets pre-defined criteria. Promotions are usually designed for a limited or short period of time relative to a product offering, to incentivize prospects and subscribers for cross bundle benefits or for seasonal events. For example, an end of season sale or a stock clearance sale.

Promotion is often applied when the customer buys the product offerings with the price or amount surpassing the certain limit. The typical example is the Buy 1 and get 1 free or Buy $100 and get $10 reduction. Promotions are always provided around a set of pre-defined criteria. As a product administrator, you can define the criteria and as a product manager you can configure the promotion as well as retire and obsolete the promotion when it is no longer required. You can view and change an event's priority before confirming the promotion entity.

Types of Promotions

Promotions in Launch are of types of Award, Discount, and Reduction.

- Award: Usually a gift or an allowance. For example, a USB disk or 100GB is given to the customer for free.

- Discount: Usually a discount on the price of the offering. For example, for every 10 quantities of a product offering that a customer buys, the customer gets 10% off on qualifying products. Another example is, if a customer buys 2 shirts, the customer gets 100 rupees off on each shirt.

For packages, discounts can be aggregate or mutually exclusive and are applied by setting the event priorities. The discount event on the top in an event list takes priority over those below it.

Mutually exclusive discount via promotion

Ensure that discounts are mutually exclusive when you purchase a bundle of items.

For example, percentage discount events are defined for a bundle named Supremo Prime Promo

- Event 1 – Supremo Prime Plan + Device get 20% off on the device.

- Event 2 - Supremo Prime only for locations in 101 and 103 get 10% off on Prime.

If customers purchase Supremo Prime Plan and the device then they get a 20% off on the device, they do not get the location based benefit if they are from locations 101, 103 as the events are mutually exclusive. If a customer purchases only Supremo Prime from location 101, they get 10% off on prime.

Aggregate discount via promotions

Specify a bundle of items and the discount that applies to specific items if the user buys the entire bundle.

For example, if the customers buys a device with a plan then they get 10% off on the device.

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Promotion Tags

Promotion tags specify how promotions are used in the context of product offerings. Optionally, as a product manager, you might want to include certain tags for an offer by attaching a promotion profile specification to it, which are created through REST APIs. Promotion tags help you define a promotion criteria. At runtime, based on the promotion profile attached, offerings which match the promotion profile are filtered.

As a product manager, when configuring an offering of type simple and bundled offer (service, commercial, packages), you can add, edit, or remove promotion tags by allowing the user to choose the promotion profile specification entity which has attributes and attribute values.

For example, configure an iPhone 12 simple atomic offering, which is associated to the promotion profile specification called Apple Device specification. The promotion profile specification has the attributes brand, series, and type. The user can specify the brand as Apple, Series as 12, and Type as Device.

How are criteria parameters obtained?

Criteria parameters come from Custom Profile Specifications. As a product administrator, you configure these characteristics through REST APIs and configure the parameters to participate in the conditions where they are used during the creation of a promotion. For example, the characteristics could be:

- Customer ID
- Birthday
- Customer Level
- Offering ID
- Category ID
- Quantity
- Amount

Events and Benefits

Here's how you work with events and benefits for your promotion.

Events

You can add multiple events to a promotion. An example of an event is Buy 2 and Get 1 free or the customer's birthday. Additionally, while evaluating a promotion, events are always individually evaluated. For example, when one promotion is evaluated, within it every event is evaluated individually, if it is configured that way. Based on the number of events you configured, each event will be evaluated individually.

You can configure multiple promotion events in priority order in an event list. The discount event on the top takes priority over those below it. The default priority is overridden if you define a ceonditional sequence for the event list.

The conditional sequence of events you define determines the evaluation order of the promotion events. Each sequence contains the following:

- **Sequence Number** - Specifies the order of the sequence evaluation and can only be specified using the Launch REST API. In the user interface you can drag and position the sequence definitions in the required order.

- **Name** - Name of the promotion sequence.

- **Next promotion Event if used** - Specify the next promotion event to apply if the current promotion event is applied.

- **Next promotion Event if not used** - Specify the next promotion event to apply if the current promotion event is not applied.

You can add a conditional sequence of events to achieve aggregate discounts and mutually exclusive discounts. For example, consider that you have 3 offers that include an internet plan, a mobile plan and a device. You can create two events, event1 has mobile and internet subscription with a discount of 20% and event2 has internet plan subscription and subscriber is from a particular location then the discount is 10%. At runtime, the event1 is analyzed and if the customer subscribes to the internet and mobile subscription then a 20% discount is applied and the sequence exits else it moves to next promotion event2. If the customer has internet subscription and is from the specified location then a 10% discount applies else the sequence exits without applying any discounts.

Criterion and Criteria Group

Creating an event requires that you must set the criteria for each event. Criteria consists of criteria groups and criterion within them. The logical relationship between different groups is decided by the relationTypeInGroup. A vital element of setting up a criteria is setting the criteria group conditions.

The two conditions that you can choose for your criteria groups are AND or OR, which will be applicable to the multiple criterion that you might create within each criteria group. While creating individual criterion parameter level within a criteria group, you can also choose from AND or OR.

Benefits

Based on the promotion type that you choose, the benefits that you can provide to a customer may differ. Here's a table that describes the promotion type and the associated benefit options.

Promotion Type	Criteria	Benefit Type	Example
Award (External Benefit)	Customer reaches a certain criteria, for example, either by spending a certain specified amount or by buying a certain quantity of a product or products.	Award, Allowance Example: Buy N items or more and get n items for free on qualifying products.	• Award: A physical gift, such as a mobile. • Allowance: Additional GB or MB.
Discount (Percentage Discount)	Customer reaches a certain criteria, for example, either by spending a certain specified amount or by buying a certain quantity of a product or products.	Discount Example: Buy n items or more, and get up to 25% off on qualifying products.	Discount • Buy 200$ or more, and 5% off on purchase of qualifying products. • For every 5 pairs of socks purchased, save 20%.

The execution of promotion is the responsibility of e-commerce platform which has to apply the promotion type (award or discount) based on the information retrieved from promotion API.

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Promotions and Price List

Promotions must be associated to a price list. As a product manager, you can associate or disassociate promotions to a price list. You can view the promotions in a price list and can also publish the price list with promotions to spoke systems.

Here's an example of a price list and its associated promotions.

Price List	Promotions
US Price List	• Buy 100$ and get 5% off on the qualifying product. • Buy 3 handsets and get 10% discount.

Cross-Product Discounts

Define and manage cross-product discounts.

Use cross-product discounts to model aggregate discounts or mutually exclusive discounts similar to Siebel's aggregate discount on promotional offers.

Promotions continue to work as the standard TMF 671.

Device Trade In

Configure device trade-in programs so that your customers can upgrade to the new devices by availing credits or discounts on their old devices.

You create and manage device trade-in programs from the Administration section of the Launch home page.

When you define a trade-in program, you also specify the following:

- Initiative to which the trade-in program is associated.

- Duration for which these programs are effective.

- Device specification, which could be an IMEI number or any other specification based on the response questionnaire of the trade-in device

- Redemption or benefit type where you can specify multiple values such as gift, discount, and so on.

- Whether the offer is eligible for maximum, minimum, or percentage trade-in value depending on the condition of the trade-in device.

You must define the device trade-in programs for specific product lines or categories. Doing so would ensure that all offers associated to the specified product line or category are eligible for the trade-in program.

If you don't specify the product line or category in a trade-in program, the trade-in program will be applicable to all the offers in the Launch application. Remember that you can't specify the same product line or category in more than one active trade-in program.

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Determine the Trade-In Value

Use the trade-in questionnaire to determine the quality. This questionnaire enables the run-time system to calculate the approximate value of the trade-in device based on the responses. For example, you can start with whether the old device switches on, has physical damages, and so on. This enables other applications to estimate the value of the old device, which is then offset against the price of the new device.

You can configure another set of checklist questions covering what must be verified in the old devices that you receive as part of the trade-in program. This would help you revise the initial estimate based on the actual condition of the trade-in device. These questions could verify whether the device is locked (with an operator), screen is functioning properly, and so on.

Here are some scenarios for creating a trade-in questionnaire:

- Define one or more sets of device qualification questions with each set containing a series of questions for device trade-ins.

- Use the two response options to configure interrelated questions in several ways. For example, if the device does not turn on at all, then you do not need to consider all other questions related to whether the device is working properly to estimate the trade-in value.

- Each response in a qualifier question would have a relative value of the trade-in price of the old device as percentage reduction, minimum value, or maximum value depending on the response.

- Provide a description for each choice a user would make.

Create a Promotion

Here's how you can create a promotion.

1. Go to **Promotion Management > Create Promotion**.
2. On the Promotions page, provide the identifying information like name and description.
3. Specify the effective period the promotion is valid.
    - In the Other Information section, specify the following: Initiative the promotion is associated with; Promotion type; Price List; and Promotion profile specification.
4. Click **Continue to Events** to enter the name, priority, and the description of the event.

   Note: The order of the events in the final events list determines the priority of the event and the order in which the discounts or markups are applied. You can move an event up or down in an event list based on its relative priority.

5. In the Criteria section, click **Add Criteria Group**.
6. Specify the AND or OR parameter for the criteria groups that you will create.

   Note: For all the criteria groups that you create, the parameter that you select will be applicable across the criteria groups.

7. Add the criteria group name.
8. Specify the parameter AND or OR, to say whether any of the criteria or all the criteria must be met.
9. Select the criteria parameter, operator and the criteria value depending on the criteria parameter that you have selected.

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10. In the Benefits section, click **Add Promotion Benefit**.
11. Specify the details including the action type, value, and object.
12. Click **Add Event**.
13. Click **Add Promotion Event** if you want to add another promotion event.
14. Click **Create**.

    You can now see your Promotion in the list of promotions on the Promotions page.

Add a Promotion Tag

Here's how you can add a promotion tag to an offer.

1. Go to **Offer Management**.
2. On the Offers page, from the Actions drop-down list, select either Create a Simple Offer or Create a Bundle Offer.
3. As you create the offer, on the Marketing Information page, Promotions Tag section, click **Add Promotion Tag**.
4. On the New Promotion Tag page, from the Promotion Profile Specification drop-down list, select your promotion profile specification.
5. Click **Add**.

You have now added a promotion tag to your offer.

11 Agreements and Entitlements

Agreements and Entitlements

An agreement defines the obligations to offer, provide, or produce specific products or services over a set period for a price. It contains pricing, terms, limitations, coverage, conditions, legal rights, processes, and guidelines.

Common types of agreements are sales and service agreements.

- A *sales agreement* is a contract that includes special pricing and other benefits when a customer purchases applicable products. For example, an enterprise customer of the CSP negotiates a sales agreement that discounts volume purchases.

- A *service agreement* is a service contract. For example, a customer purchases a business-grade internet service from the CSP. The CSP might negotiate a service agreement with the customer providing a special discounted rate to repair faults at customer premises over a predetermined period.

Entitlements

Entitlements are part of a sales or service agreement. In a sales agreement, it includes information about special pricing that applies to the sale of products. You can use entitlement-based service metrics as part of a service level agreement. You can use entitlement templates to apply entitlement-based pricing or service metrics information.

You create an entitlement template from the Administration section of the Launch application home page.

An entitlement template includes the following:

- Benefit. A benefit is the entitlement pricing information maintained as price alterations.

- Condition. A condition denotes criteria that determine a customer's entitlement to the benefit.

- Metric. A metric denotes the performance requirement of an entitlement template and is usually associated with a service-level agreement (SLA) within a sales or service agreement. SLAs often indicate the expected response and resolution times for a service request based on the request priority

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12 Catalogs and Categories

Create Catalogs and Categories

Use this topic to create catalogs and categories.

Create a Catalog

To create a catalog:

1. Go to **Administration > Catalog and Categories** and click **Create**.
2. On the New Catalog page, enter you catalog name and description. The catalog ID is automatically generated for you.
3. From the Initiatives drop-down list, select an initiative that you want to associate this catalog with. This initiative becomes the parent container.
4. From the Catalog Type drop-down list, select the type as either Product, Service, or Resource.
5. Click **Create**.

The catalog in now listed on the Catalogs page. By default, this catalog is in the In design state.

Create a Category

To create a category:

1. Select the catalog in which your category would be listed.
2. Click **Edit**.
3. In the Associated categories section, click **Add a new category under this catalog**.
4. In the New Category page, enter your category name and description.
5. Click **Update**.

Your category is now listed in the catalog. Expand your catalog to view all your categories in the catalog.

You can also add sub categories category within a category as well. To create a sub category:

1. On the New Category page, Sub Categories section, click **Add Sub Category**.
2. Enter a sub category name, description, and click the tick icon.

   The sub category is now listed under the sub categories section.
3. Click **Add**.

The category and the sub category are now associated to the catalog.

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13 Rules

Rules Overview

Use this topic to understand the types of rules you can define in the Launch application when creating offers or specifications.

What's a rule

Rules are different types of conditions that you can set for product offers. These conditions are applied during the ordering process to ensure that the validations and checks are in place.

You can view, confirm, edit, or revise rules based on the lifecycle status of the related offer.

How do I create rules

You can define rules from either the Rules landing page or through the guided flow for offer creation depending on your role. Creating rules using the guided flow for offer creation is available to both administrators and product managers. If you're an administrator, you can use the Rules card on the home page to navigate to the Rules landing page to create rules.

Considerations when creating rules:

1. Rules are top-level resources in the Launch application. You can define these rules using REST APIs and also from the Launch application UI. See *Use REST APIs to Create Catalog Entities* to create rules using APIs and *Product Offer Guided Flow* to create rules using the Launch UI.
2. Validations are in place to detect contradicting rules.
3. Some of the rules may need logical operators to specify criteria that you must set carefully. These criteria include specifying whether a product requires another product, a product line excludes a product, and so on.
4. You can't edit rules for an offer that's retired.

Types of Rules

You can set the following types of rules when creating product offers or product specifications:

- Eligibility rules: Defines the eligibility criteria of a user to buy a product offer or service. For more information, see *Eligibility Rules*.

- Compatibility rules: Specifies the inclusion or exclusion of a combination of products in an offer. For more information, see *Compatibility Rules*.

- Recommendation rules: Provides cross-sell and up-sell opportunities for offers. For more information, see *Recommendation Rules*.

- Upgrade and downgrade migration rules: Defines the permissible offers that the customers can migrate to or migrate from along with the terms. For more information, see *Migration Rules*.

- Constraint rules: Defines the relationship between any two items in a product offering. For more information, see *Constraint Rules*.

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Constraint Rules

Use constraint rules to enforce the components selection for a Commercial bundle and Service bundle. Defining these rules restricts the choices the users can make at runtime while configuring the cart.

Defining constraint rules lists or limits the choices the user can make when working with relationships, product offerings, or with attributes in product offerings.

For example, a constraint rule may prevent a user from selecting an attribute value, say a color or size, for a component that doesn't support that color or size value.

You can access constraint rules from the Rules card in the administration menu.

To configure constraints, you must first select a template and then configure the constraint rule based on that template using a graphical builder.

Select a constraint rule template

The supported constraint templates that you can use to create a constraint rule are:

Constraint rules template

Rules template	When to use the template
Attribute expression	Use this template to create an expression where the value of an attribute requires or excludes a value of another attribute. For example, the attribute value of red isn't available for attribute value of large.
Attribute value	Use this template where an attribute equals a value. For example, more than three OTT services would require a router that support at least 100Mbps
Relationship quantity	Use this template to determine the number of entities that can be included in a relationship. For example, you can define that for 02 mobile phones the customer must purchase 02 quantities of both voice and data.
Excludes	Use this template when a resource or an expression must exclude another resource or an expression. For example, a premium service does not support 16 GB memory size.
Requires	Use this template when a resource or an expression must include another resource or an expression. For example, a premium service requires a 100 Mbps router.
Requires (Mutual)	Use this template when any two resources or expressions must mutually include each other. For example, when two interdependent products can't be sold independently

Model the rule using constraint rule Graphical builder

The constraint builder contains logical or comparison operators along with expressions to help you build your constraint rule.

A constraint may have the following:

1. Selected product offering, relationship, an expression using the entities within the relationship, or attributes within a relationship
2. The constraint type as requires, requires (mutual), or excludes. Requires is the default setting

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3. Selected product offering, relationship, an expression using the entities within the relationship, or attributes within a relationship

If your configuration spans across multiple nodes within the construct builder, you can take help from the textual construct of the configuration that simultaneously appears on the UI.

Eligibility Rules

Use this topic to understand how you create and manage eligibility rules.

You can set eligibility rules to specify whether a user is eligible for a product offer or product service. You can set up different eligibility rules based on multiple conditions and specify whether all or some of the conditions are applicable. For example, you can make a product available to customers of a specific region.

Eligibility rule is a top-level resource in the Launch application. You can define these rules using both REST APIs and from the Launch application UI.

See *Use REST APIs to Create Catalog Entities* on using REST APIs to create catalog entities.

Create Eligibility Rule

Here are the quick steps to creating an eligibility rule as part of the guided flow for creating offers. If you're an administrator, you can also navigate to the Rules landing page directly from the application home page to create rules.

1. On the Rules page, click **Create Eligibility Rule**.
2. Specify details including the eligibility criteria and the effectivity dates. Specify additional criteria if needed and then click **Create**.

You can also edit, delete, or deactivate product eligibility rules.

Here's an example of an eligibility rule where an offer is eligible for customers residing in the United States.

Parameter	Operator	Value
Country	Equals	United States

Related Topics
- Product Offer Guided Flow
- Use REST APIs to Create Catalog Entities

Compatibility Rules

Use this topic to understand how you create and manage compatibility rules.

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You use compatibility rules to define contextual dependencies or exclusions among catalog entities in both simple and bundle offers. You can define compatibility rules for product offers, product lines, and product specifications.

As a product manager, you can specify the subject and the target for the compatibility rule. The subject defines the product that requires or excludes another product and a target defines the product that's required or excluded. This dependency can also be mutual where both the subject and the target require each other. You decide the rules for your entity when creating the compatibility rule. For example, a `requires` rule could be that a faster internet plan requires a router that supports the new bandwidth.

Compatibility rule is a top-level resource in the Launch application. You can define these rules using both REST APIs and from the Launch application UI. See *Use REST APIs to Create Catalog Entities*.

Create Compatibility Rule

Here are the quick steps to creating a compatibility rule as part of the guided flow for creating offers. If you're an administrator, you can also navigate to the Rules landing page directly from the application home page to create rules.

1. On the Rules page, click **Create Compatibility Rule**.
2. Specify the required details including entity type and rule type. Some of the rule types are: `REQUIRES`, `REQUIRES (MUTUAL)`, `EXCLUDES`, and `COMPATIBLE`.
3. Specify the search criteria as either product offering or product line and enter the effective start and end date for the rule.
4. Click **Create**.

Note: The `COMPATIBLE` operator provides design flexibility at runtime. For example:
- You can allow device modeling outside the package.
- You can reduce dependency on offer aggregation constructs.
- You can create a storefront experience of selecting a package and listing all compatible offers and product lines or selecting a device and listing the compatible packages.

Related Topics
- Product Offer Guided Flow

Recommendation Rules

Use this topic to understand what recommendation rules are and how you create them.

Recommendation rules are a top-level resource in the Launch application. You can create recommendation rules as part of the offer creation flow. You create these rules to provide sales representatives with cross-sell and up-sell opportunities for existing customers based on installed base products, demographics and other account-specific attributes. You can create recommendation rules for only simple offers. You can also edit, delete, or inactivate recommendation rules.

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Create Recommendation Rules

Here are the quick steps to creating a recommendation rule:

1. During the offer creation process, click **Add Recommendation Rule** on the Rules page.
2. Specify whether it's an up-sell or cross-sell recommendation, and then specify the product offer to which the recommendation is applicable.
3. Specify the reason why a customer must purchase the recommended product.
4. Enter the score for the rule. This score determines the comparative value of a recommendation to other recommendations and it must be unique.
5. Enter the effective start and end dates for the recommendation you're creating.
6. Click **Add**.

Here's an example of a recommendation rule where the marketing administrator recommends a small memory card.

Product	Reason	Effective Start Date
8 MB memory card that's compatible with the 2.0 MP camera.	An extra memory card is required to store more than 20 pictures.	1st June 2020

Related Topics
- Product Offer Guided Flow
- Use REST APIs to Create Catalog Entities

Migration Rules

Use this topic to understand migration rules and how you create these rules for bundle offers.

Migration rules is a top-level resource in the Launch application. You create these rules as part of the offer creation process for customers to upgrade or downgrade from one product offer to another.

These rules basically define the upgrade or downgrade path between marketable offers. You can create upgrade or downgrade rule for only bundle offers.

Note: Migration rule is applicable between sellable bundles (commercial, service or package).

Create Upgrade or Downgrade Rule

Here are the quick steps to creating upgrade or downgrade rule:

1. During the offer creation process, click **Upgrade To** or **Upgrade From** on the Rules page.
2. Specify the details depending on whether you're creating an upgrade or a downgrade rule

   A customer can either migrate from a source offer to the current offer, or from the current offer to another offer.

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3. Specify other details including the penalty amount. A penalty amount is charged if the customer terminates the offer before the specified end date.

4. Click **Add**.

You can also edit, delete, or inactivate upgrade or downgrade rules.

Here's an example where a penalty is charged for terminating the current offer before it ends.

Upgrade Type	Offer	Commitment Start	Duration	Penalty
Upgrade to	Wireless 2000 package	Now	New Duration	$50

Related Topics
- Product Offer Guided Flow
- Use REST APIs to Create Catalog Entities

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14 Product Lines

Product Lines Overview

Product lines are logical groupings of products. They could also be called as an offer family. As an administrator, you can define the product lines and as a marketing manager, you can associate the offers to a product line.

You can also define compatibility rules for product lines. When you create a compatibility rule for a product line, you can choose either a product or a product line as the target of the rule. For more information on compatibility rules, see *Compatibility Rules*.

Create Product Lines

Here's how you can create product lines.

1. Go to **Administration > Product Lines** and click **Create**.
2. On the New Product Line page, enter a name and description. The ID is automatically generated for you.
3. From the Initiative drop-down list, select an initiative for the product line.
4. Enter a start date and end date.
5. Click **Create**.

Optionally, as an administrator, you can also set a compatibility rule between product lines and here's how you can do it:

1. On the New Product Line page, click **Add Compatibility Rule** under Compatibility Rules.
2. Specify the information required and click **Add**.

Your product line is now listed on the Product Lines page. By default, this product line is in the In design state. You can view, edit, delete, or confirm your product line. Once you confirm your product line, it moves to Ready to Publish status, and then can be published via an initiative.

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15 Entity Lifecycle Management

Manage Entity Lifecycle Using Initiatives

Use this topic to understand how you can manage the publishing and the lifecycle status of catalog entities using initiatives.

All the catalog entities are associated with an initiative and whenever an initiative lifecycle status changes, the status change trickles down to the entities that belong to initiative. Pre-determined rules drive the lifecycle status transition in Launch Experience. However, roles with Change Lifecycle Status privilege can override the lifecycle status of an entity to any desired status.

An initiative goes through these lifecycle statuses for two instances – test and production

Scenario 1 – Release a new product offer in the market

Test Instance

1. **In design** : Your entities are being designed. You must confirm an initiative to move it to the next status.
2. **Ready to publish**: This is an interim status. After you publish and receive confirmation from the spoke system, the status moves to the next one.
3. **In test**: If you have successfully tested, you can move the initiative to **Active**, otherwise, you can move it back to **In design** status. Once you have QA approval, move the initiative to **Active** status.
4. **Active**: You can export the initiative from a test environment and import it to a production instance.

Production Instance

1. **In design** : Import the above initiative from the test environment to the **In design** status.
2. **Active**: Manually change the status to **Active**. Publish the initiative to production instance.
3. **Launched**: Initiative status changes to Launched. The entities of that initiative are now available in the external selling channels. In the test instance, you can manually change the initiative to Launched as well.

Scenario 2 – Revise a product offer to release in the market

Test Instance

1. **In design** : Your entities are being designed. You must confirm an initiative to move it to the next status.
2. **Ready to publish**: This is an interim status. After you publish and receive confirmation from the spoke system, the status moves to the next one.
3. **In test**: If you have successfully tested, you can move the initiative to Active, otherwise, you can move it back to In design status. Once you have QA approval, move the initiative to Active status.
4. **Active**: You can export it from a test environment and import it to a production instance.

Production Instance

1. **In design** : Import the above initiative from the test environment and the initiative moves to the In design status.
2. **Active**: Manually change the status to Active. Publish the initiative to production instance.
3. **Launched**: Initiative status changes to Launched. The entities of that initiative are now available in the external selling channels. In the test instance, you can manually change the initiative to Launched as well.

You can handle similar scenarios involving bug fixes and major releases in parallel, multiple test instances, and, or retiring or obsoleting an entity, and so on in the same manner as described above.

> **Note:** All content changes to be made in the test instance only, and not the production instance.

You can associate entities with an initiative only in the In Design status. You can design your product offer, add, or remove entities. After your design is complete, you can confirm your initiative to move it to the Ready for publish status. Now you can't update your entities. After all the entities in an initiative are ready to be published you can publish the initiative.

Optionally, you can also mandate approvals for your initiatives. For example, you can mandate that an initiative must go through an approval process before it moves to Ready to publish.

Lifecycle Stage and User Actions

The following table lists the actions that you can perform on catalog entities depending on the lifecycle of an entity. Additionally, you can also transition within these life cycle statuses by associating the entities with an initiative.

Actions	Status	Description
View	- In design - Ready to publish - In test - Launched - Active - Retired - Rejected	You can view the offer details in a read-only mode. This serves as a snapshot of the catalog entity.
Edit	In design	You can open the catalog entity in an edit mode. This takes you through the guided UI flow.
Confirm	- In design - In test	You can confirm your product catalog entity to move it to the Ready to test or Ready to publish statuses.
Clone	- In design - Ready to publish - In test - Launched - Active - Retired - Rejected	Opens the Clone catalog entity dialog box. Eventually takes you to the guided UI flow.
Revise	Launched	You can create a revision of the launched catalog entity.
Retire	Launched	You can associate your product catalog entity with an initiative and the initiative can be retired.
Obsolete	Retired	You can obsolete a product catalog entity after it has been retired.

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Actions	Status	Description
Publish	• Ready to publish	You can publish your product catalog entity to a spoke system for testing.

Related Topics

- Initiatives Overview
- Product Offer Guided Flow

Configure a New Lifecycle Status

Use this topic to know how you can create and manage a new lifecycle status for entities.

As a product administrator, you can create and configure new lifecycle statuses in addition to the ones that are already shipped in the Launch application.

Create a Lifecycle Status

You can add a lifecycle states only between In design and Launched status. For example, you can add a testing phase, such as Unit testing or UAT testing in the testing phase.

Here's how you can create a new lifecycle status:

1. Go to **Administration> Lifecycle Status** and click **Manage**.

   The entity lifecycle status configuration version in active state appears.
2. Select **Save as New Version** from the Save drop-down list.
3. In the new version, click **Create Status**.
4. On the New Status page, enter the status name.
5. Select where you want to add the lifecycle status from the Create After drop-down list.

   A sequence number gets allocated to the status.
6. In the Other Information section, define the next User Action.
7. From the Error State drop-down list, select an error state for the status.
8. Enable the following options as required:

   a. Edit Initiative: Specify if the initiative can be edited.
   b. Edit Initiative Entities: Specify if the initiative entities can be edited.
   c. Requires Approval: Specify if the initiative requires approval.
   d. Allow References in Other Initiatives: Specify if the initiative can be referred to in other initiatives.
   e. Enable Publish: Specify if the initiative can be published.
9. Enter the destination.
10. Click **Add Destination**.
11. Click **Create**.

    Your new version is now active.

If you want to create more versions, select **Save as New Version** on the Lifecycle Status page. After a new version is activated, it's only applicable to the new entities that get created thereafter. Ensure that at any point of time, only one version must be in Active status.

After you have created a new lifecycle status, you can create revisions, where you can add multiple lifecycle statuses as required and activate the new lifecycle configuration. However, ensure that at any point of time only one lifecycle workflow is active in the application and all the associated entities transition according to the lifecycle statuses defined in lifecycle workflow, in active state.

You can create a new lifecycle configuration from an Active lifecycle configuration only. Any newly created lifecycle creation will be in the Pending status and will need an activation process. When you activate a new lifecycle configuration, the current one is inactivated. The initiatives following the older, inactive configuration lifecycle will continue in that process. It's only the newly created initiatives that will follow the new lifecycle status configuration.

Additionally, you can also define the conditions that control the lifecycle status transitions, such as:

- Edit initiative: Specify if you can edit initiative entities.

- Edit initiative entities: Specify if you can add or remove the initiative entities.

- Requires Approval: Specify whether approval is required for a lifecycle transition.

- Enable Publish: Specify if the status can be published to spoke systems.

- Allow References in Other Initiatives: Specify if the catalog entity reference can be made in another initiative.

You must also specify the destination and the next user action for every status that you create.

16 Import and Export Catalog Entities

Import Catalog Entities

Use this topic to understand the considerations involved in importing catalog entities.

Use the import feature to import third-party catalog entities along with their initiative references.

> **Note:** When you set up the Launch application, your administrator must increase the number of import threads using the EGP_ITEM_IMPORT_NUMBER_OF_THREADS profile option. See *Item Profile Options*.

Here's how you configure catalog import:

1. Prepare the import data file.

   For more information on preparing the import file, see *Import Catalogs*.
2. Go to **Administration > Job Management** and click **Manage**.
3. On the Job Management page, click **Import Jobs**.
4. On the Import Jobs page, click **Create Import Job**.
5. On the New Import Job page, click **Select a file** and select the JSON file that you have prepared.
6. Click **Import**.

When you create an import job, you receive an import job ID for the same along with a failure or success notification on job completion. For every import job, you can provide an initiative in the payload to be associated with the entities. You also have the flexibility to associate the entities of an import job to new or existing initiatives depending on your requirements.

Additionally, you can also check for any existing import jobs by the import file name, job ID, or submitted by option provided to you in the Search by type field on the Import Jobs page. Viewing an import job provides you with details such as Job ID, Submitted By, Input File, Status, Created and Completion dates, Status, Error Summary and Error File in case of an error, and an option to download the error JSON file.

After the import process completes successfully, the initiative, the product offer, and all its entities are available on your application. Go to the Offer List page to search and view the product offers that you have imported.

Export Catalog Entities

Use this topic to know how to export catalog entities from the Launch application.

You can only do initiative-based and entity-based export.

As an administrator, here's how you can initiate an export.

1. Go to **Administration >Initiatives**.
2. On the Initiatives page, select the initiative that needs to be exported and from the Actions drop-down list, click **View**.

3. On the initiatives page that you just selected, click **Export**. The export job gets triggered and the job ID is notified to you.

Here's how you can track the export job:

1. Go to **Administration > Job Management** and click **Manage**.
2. On the Job Management page, click **Export Jobs**.
3. On the Export Jobs page, search for your export job either by the **Job ID** or **Submitted By** options from the Search by type drop-down list or by the file name in the search bar.

The Export Jobs page lists all the export jobs that have been triggered. You can monitor and track the progress of the export job. View each job to get more details on the job. To download the exported content, once the export job succeeds, click **Actions** > **Download from**.

> **Note:** You cannot export initiatives or resources that are in `In Design` status

Related Topics
- Manage Entity Lifecycle Using Initiatives

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17 Publish Catalog Entities

Integrate with Siebel CRM

You can migrate and publish catalog definitions along with their extensions between Siebel and Launch application.

Overview

Migration enables Launch to be the master of the migrated entities. You have to perform a one-time migration from Sibel to master the Catalog definitions in Launch. Further updates to the migrated entities or creation of new entities will be carried out in Launch and published to Siebel via the CX Industries framework.You must have Catalog Administrator privilege to migrate entities.

> **Note:** For detailed information on setting up the sync, see Supporting files for Oracle Digital Experience for Launch, Doc ID 2826909.1, on My Oracle Support.

What you can Migrate or Publish

Here's the list of entities that you can migrate along with the details about the seeded mappings available to you in the JSON file.

Entity name in Siebel CRM	Entity Name in Launch	What you can migrate
Catalog	Catalog	• Definition • Category Association
Category	Category	• Definition • Sub-categories • Product Association
Product Class	Product Specification	• Definition • Parent-Child Relationships • Attributes • Smart Part Number (user defined)
Products	Simple Offer	• Definitions • Category/Class/Product Line association • Prices and Adjustments • Compatibility and Eligibility Rules • Recommendation and Migration Rules (Publish only)
Product Line	Product Line	• Definition

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Entity name in Siebel CRM	Entity Name in Launch	What you can migrate
		• Product association • Compatibility and Eligibility Rules
Price list	Price list	• Definition and its associations
Promotion	Package	• Definitions • Category/Class/Product Line association • Components along with Aggregates and Option Class • Compatibility and Eligibility Rules • Recommendation and Migration Rules (Publish only)

External Job (Migration Job)

To migrate entities, you must create a migration job.

As a pre-requisite It is mandatory to complete the post provision process detailed in the implementation guide, see *Integrate Launch with Siebel CRM*.

Here's a summary of the steps to create a migration job:

1. Go to **Administration** > **Job Management** and click **Manage**.
2. On the Job Management page, click **Migration Jobs**, and then click **Create Migration Job**.
3. Select a source application from which the entities will be migrated.
4. Select the appropriate API for the entity that you want to migrate and complete the query parameters along with the value as described in the following table.

Available APIs	Query parameters	Sample Query parameter Value	What's migrated using the APIs
/migration/class	1.$.SiebelMessage['ListOfSWIAdminISSClass DefinitionIO'] ['SWI ISS Class VOD BusComp'].searchspec 2.$.SiebelMessage.ListOfSWIAdminISSClass DefinitionIO. ['SWI ISS Class VOD BusComp'].['VOD Name'] 3.$.SiebelMessage.ListOfSWIAdminISSClass DefinitionIO. ['SWI ISS Class VOD BusComp'].['VOD Id'] The searchspec can be used across the API by following the syntax as follows '[<fieldName>] <= or LIKE> <fieldValue>' as shown in sample 1.	a. "queryValue": "([VOD Name] like 'Supremo*')". b. queryValue": "Supremo 5G Dual" c. queryValue": "88X3281"	Product class with its attributes.
/migration/ pricelists	No query parameter.	No query_param/ query_value in request	All the pricelists available at the source.

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Available APIs	Query parameters	Sample Query parameter Value	What's migrated using the APIs
/migration/ package_ref	$.SiebelMessage['ListOfSWI Admin ISS Product Definition'].['SWI Internal Product VOD'].Name		
/migration/ pricelists_by_id	@pathParam(id)	"queryValue": "88-290-3"	Pricelist based on the specific ID.
/migration/ catalog	$.SiebelMessage['ListOfBase Catalog Admin'].['Product Catalog'].Name	"queryValue": "Mob*"	Catalog and its associated categories.
/migration/ device	$.SiebelMessage['ListOfSWI Admin ISS Product Definition'].['SWI Internal Product VOD'].Name	"queryValue": "Supremo 5G Dual"	Product is migrated as an atomic product offer of type Device.
/migration/ service	$.SiebelMessage['ListOfSWI Admin ISS Product Definition'].['SWI Internal Product VOD'].Name	"queryValue": "Supremo Wireless Service"	Product is migrated as atomic product offer of type Service.
/migration/ device_ref	$.SiebelMessage['ListOfSWI Admin ISS Product Definition'].['SWI Internal Product VOD'].Name	"queryValue": "Supremo Mustang 4G"	Product is migrated as atomic product offer of type Device along with its referenced entities.
/migration/ service_ref	$.SiebelMessage['ListOfSWI Admin ISS Product Definition'].['SWI Internal Product VOD'].Name	"queryValue": "Supremo GPRS"	Product is migrated as atomic product offer of type Service along with its referenced entities.
/migration/ productCompatibl	$.SiebelMessage['ListOfSWI Admin ISS Product Definition'].['SWI Internal Product VOD'].Name	"queryValue": "Supremo Dual Wireless Bundle"	Rules associated with the product.
/migration/ productLine	$.SiebelMessage.['ListOfSWI Admin Product Line']. ['Admin Product Line'].Name	"queryValue": "Supremo Handsets"	Product line

5. The Migration API header parameters section contains the default header parameters to invoke the API job.

Key	Required or Optional	Description
X-Source-PreSelection	Required	The source application instance name defined in TTD/TIC as TargetPreselection. Used for routing.
X-Target-PreSelection	Optional	Target application instance name defined in TTD/TIC as TargetPreselection. Used for routing.
X-Version	Optional	Version of the mapping
X-Destination-System	Required	Destination name defined in mapping
X-Source-System	Required	Source name defined in mapping

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Key	Required or Optional	Description
Test-Mode	Optional	true/false to toggle test/api mode
Mode-Type	Required for TEST Mode	WITH_SUB_QUERY/TRANSFORMED_RESPONSE
Source-Response-Index	Required for Test Mode	Used for multiple objects returned by source query
Target-Api-Path	Optional for Test mode	Path for target API defined in mapping
Use-Sample-Response	Optional for Test Mode	true/false to toggle sample data/real data
X-Target-Bulk-Api-Batch-Size	Optional	Numeric value which helps in processing the targetApi path
User-<Key>	Optional	This user key is as defined in the mapping schema. For example, using `siebel_launch.json` schema user can pass User-Project-Name, User-Project-Id and User-Project-Create to pass project name, project id and whether to create a project or use an existing one.

6. In case you expect a high number of migration records in a job, use the batch parameters fields like **Page Size**, **Start Offset**, and **Batches** to specify the number of records to be processed per batch along with the offset.
7. Click **Submit**.

   You have now submitted your migration job.

After you submit your catalog migration job, you can monitor the summary of the job. To view the summary, from the Launch home go to **Administration > Job Management > Migration Jobs**.

The job details include the job ID, source application, and details about the number of records fetched, processed, failed or skipped. You can also download from the UI the log file containing details about the migration job. If there's an error in migration , the job details include an error message showing the possible cause.

Publish Job

The publication of updates to migrated entities or new entities created in Launch to Siebel continues to follow the existing CX Industries Framework.

Things to consider during Migration and Publish:

- Prior to migration simple products from Siebel, the same should be segregated as service or device type and the respective APIs is to be invoked for migration into Launch.

- All the customizable bundles will be migrated as commercial bundles into Launch.

- The migration will always pick the latest released version into Launch.

- Any product which does not hold the mandatory association like the product specification or service specification entities will be migrated with default 'Dummy Product Spec' and 'Dummy Service Specification' into Launch.

- The entities published from Launch will be created under a default workspace.

- The published entities will be in released state in Siebel.

- The products with more than one POP of same price type or multiple price type will be published as a customizable bundle (**CP**) with simple product (**SP**) for every independent POP.

- The commercial bundle or service bundle will be published with structure type = customizable.

- Any commitment terms at promotional level are to be created in Siebel post publish.

Known limitations between Launch and Siebel CRM

Launch does not support the following:

- Alteration types like Price Override, Multiplicative Amount, Round, and Power.

- Effective period at overall volume discount level.

- Multiple Active versions for a product.

- Independent Pricing at package offer/commercial bundle level.

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