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PDC Online Help



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Contents

About This Content

1 Getting Started with Pricing Design Center

Using the PDC User Interface 1
- Supported Browsers 1
- About the Processing Indicator 1
- About Session Timeout 2
- Understanding the Workspace Page 3
- Closing a Tab 4
- Logging Out 4

Working with Pricing Design Center 4
- Working with Pricing Components 5
  - Creating Pricing Components 5
  - Modifying Pricing Components 5
  - Deleting Pricing Components 6
  - Obsoleting Pricing Components 6
  - Validating Pricing Components 8
- Searching for Pricing Components 8
  - Basic Search 8
  - Advanced Search 9
  - Saved Search 10
  - Contextual Search 11
  - Used By Search 11
  - Query-by-Example Search 12
  - Search Page Reference 12
- Saving a Pricing Component 13
- Viewing a Chart of Offers By Service 14
- Working with Tables 14
  - Sorting Data in Tables 14
  - Detaching and Attaching Tables 15
  - Adding or Removing Table Columns 15
  - Reordering Table Columns 15
  - Adding Rows to a Table 15

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Deleting Rows from a Table 15
Enabling the Query-by-Example Bar 16
Setting Validity Periods 16
Changing Your Password 16
Using Keyboard Shortcuts 16

2 Setup Components

Creating Service-Event Maps 1
Service-Event Map Page 2
Map RUMs Dialog Box 3
RUM Expression Builder Dialog Box 3
New RUM Dialog Box 3
Creating a RUM Configuration 4
Creating Impact Categories for Zones 4
About Impact Categories for Zones 5
Impact Categories Page Reference 5
Impact Categories for Zones Section 5
Creating Balance Elements 6
Creating Currency Balance Elements 6
Creating Noncurrency Balance Elements 7
Adding Rounding Rules for Specific Events 8
Balance Elements Page Reference 8
Balance Elements Section 9
Balance Elements Table 9
Rounding Rules Section 11
Processing Stage and Event Selection Dialog Box 12
Creating Zone Models 12
Creating Standard Zone Models 13
Creating Geographical Zone Models 14
Zone Models Page Reference 15
Zone Models Section 15
Details Section 16
Zone Rules Subtab for Standard Zone Model 16
Zone Rules Subtab for Geographical Zone Model 17
Area Codes Subtab 17
Configuring Policy Specifications 18
Specifying General Information for a Policy Specification 18
Creating Policy Labels 18
Creating Counter Policies 19
Adding Counter Ranges 19
Modifying Policy Specifications 20

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Modifying Policy Labels 20
Modifying Counter Policies 21
Modifying Counter Ranges 21
Deleting Policy Specifications 21
Deleting Counter Policies 21
Deleting Counter Ranges 22
Policy Specifications Page Reference 22
Policy Specifications Section 23
Create Policy Label Dialog Box 23
Create Counter Policies Dialog Box 23
Configuring Item Type Selectors 24
Specifying General Information for an Item Type Selector 24
Selecting Rule Attributes 25
Creating Item Type Selector Rules 25
Changing Priority of the Rules 26
Creating Item Specifications 26
Modifying Item Type Selectors 27
Deleting Item Type Selectors 27
Item Type Selectors Page Reference 28
Item Type Selectors Section 28
Item Specifications Dialog Box 29
Manage Rule Attributes Dialog Box 29
Rules Section 30
Creating Special Day Calendars 30
Special Day Calendars Page Reference 31
Special Day Calendars Section 31
Special Day Definitions for Selected Calendar Section 31
Creating Custom Analyzer Rules 32
Custom Analyzer Rules Page Reference 33
Details Section 33
Condition Builder Dialog Box 34
Creating Tax Codes 35
Creating Tax Codes for a Flat Tax or Custom Implementation 35
Creating Tax Codes for Vertex 36
Tax Codes Page Reference 36
Tax Codes Section 37
Details Section (For Flat Taxes and Custom Implementations) 37
Details Section (For Vertex) 38
Manage Validity Period Dialog Box 39
Creating Tax Exemption Codes 39
Tax Exemption Codes Page Reference 40
Tax Exemption Codes Section 40

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Jurisdictions and Rates Section 40
Manage Validity Period Dialog Box 40
Configuring Price Tags 41
Creating Price Tags 41
Modifying Price Tags 42
Deleting Price Tags 42
Price Tags Page Reference 43
Price Tags Table 43
Price Tag Details Table 44
Permitted Services Dialog Box 45

3 Changesets

Creating a Changeset 1
Specifying the Active Changeset 2
Validating a Changeset 2
Submitting a Changeset 3
Showing or Hiding Failed Changesets 4
Fixing a Failed Changeset 5
Exporting and Importing Changesets 5
Exporting Changesets 5
Importing Pricing and Setup Components into Changesets 6
Modifying a Changeset 7
Deleting a Changeset 7
Workspace Page Reference 8
Changeset Details Section 8
Create Changeset Dialog Box 9
Edit Changeset Dialog Box 9
Export Dialog Box 10
Import Dialog Box 10
Hide and Close Failed Changesets Dialog Box 11

4 Charge Offers

Creating a Charge Offer 1
Specifying General Information for a Charge Offer 1
Specifying Product Specification Attribute Values 2
Specifying Charge Offer Settings 2
Adding Deliverables 3
Adding Charges to a Charge Offer 3
Adding a New Charge 4
Adding Additional Currencies to a Charge 6

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Removing Currencies from a Charge 6
About Charge Categories 7
Adding a New Fold Charge 7
Adding an Existing Charge 8
Adding an Existing Charge Selector 8
Working with Charges 9
About the Charges Tree 10
Editing Charge Details 10
Removing a Charge from a Charge Offer 11
Adding Impact Categories and Time Periods to a Charge 11
Adding Impact Categories to a Charge 11
Adding Time Periods to a Charge 12
Grouping Components in a Charge 13
Ungrouping Components in a Charge 13
Setting Up Pricing for a Charge 14
Adding Pricing to a Charge 14
Adding Pricing to a Charge 15
Adding a Price Selector to a Charge 15
Adding a Generic Selector to a Charge 15
Adding a Price Override to a Charge 16
Configuring Balance Impacts for Charges 17
Adding Balance Impacts to Charges 17
Adding Balance Impacts to Fold Charges 18
Adding Balance Impacts to Rollover Charges 18
Configuring Counters for Charges 18
Configuring Conditional Balance Impacts 19
Adding Multiple Validity Periods to Noncurrency Balance Impacts 19
Specifying a Minimum Charge 20
Adding Effective Periods to Charge Pricing 21
Deleting Effective Periods from Charge Pricing 21
Changing the Start Date of Effective Periods in Charge Pricing 22
Adding Quantity Ranges to Charge Pricing 22
Adding Ranges for Usage Pricing 23
Changing the Start and End Values of Quantity Ranges in Charge Pricing 24
Changing the Noncurrency Balance Element in Quantity Ranges 24
Changing the Order that Granted Allowances Are Consumed 25
Editing Quantity Range Properties 25
Automatically Renewing Granted Allowances 26
Adding Price Tags to One-Time and Recurring Charges 27
Adding Price Tags to Usage Charges 27
Identifying the Components That Share a Charge 28
Modifying Pricing without Inadvertently Affecting Other Components 28

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Renaming Charge Pricing 29
Adding Price Tiers 30
Removing Price Tiers 30
Deleting a Pricing Tag 31
Adding Date Ranges to a Charge 31
Modifying Date Ranges in a Charge 32
Create Charge Offer Page Reference 32
General Information Section 33
Product Specification Attributes Subsection 33
Offer Settings Subsection 34
Deliverables Subsection 35
Charges Section 36
Add Charge List 37
Charge Selector Configuration 37
Proration Settings Dialog Box 37
Used By Button 38
Charge Actions List 38
Charges Tree 38
Pricing Details Section 39
Pricing Table 41
Rollover Rules Section 45
Price Override Section 46
Price Tag Dialog Box 47
RUM Details Dialog Box 47
Create Charge Dialog Box 48
Taxation Section 49
Advanced Section 50
Cycle Settings Section for Recurring Charges 51
Proration Section for Rollovers 52
Search for Charges Dialog Box 53
Search for Charge Selectors Dialog Box 54
Charge Details Dialog Box 55
Taxation Section 56
Advanced Section 56
Cycle Settings Section 57
Add Impact Categories Dialog Box 59
Add Time Periods Dialog Box 59
Add Generic Selector Dialog Box 60
Search for Price Selectors Dialog Box 60
Change Price Dialog Box 61
Properties for All Quantity Ranges 62
New Date Range Dialog Box 64

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Manage Date Ranges Dialog Box 65
Edit Date Range Dialog Box 65

5 Discount Offers

Creating a Discount Offer 1
Specifying General Information for a Discount Offer 1
Specifying Product Specification Attribute Values 2
Specify Discount Offer Settings 2
Adding Discounts to a Discount Offer 3
Adding a New Discount 3
Adding an Existing Discount 4
Adding a Discount Selector 5
Configuring Discount Rule 5
Specifying How to Apply the Discount 6
Configuring Discount Filters 6
Adding a New Filter 6
Adding an Existing Filter 7
Configuring Discount Triggers 7
Adding a New Discount Trigger 8
Adding an Existing Discount Trigger 8
Adding a New Discount Rule 9
Renaming a Discount Rule 9
Reordering Discount Rules 9
Deleting a Discount Rule 10
Setting Up Pricing for a Discount 10
Selecting Quantity Ranges 10
Adding Quantity Ranges to a Discount Pricing 11
Modifying Quantity Ranges in Discount Pricing 12
Deleting Quantity Ranges 12
Adding Balance Impacts for Discount Pricing 12
Adding Price Tags to Discounts 13
Identifying the Components That Use a Shared Discount 14
Modifying Pricing without Inadvertently Affecting Other Components 14
Adding Date Ranges to a Discount 15
Modifying or Deleting Date Ranges in a Discount 15
Changing Discount Details 16
Removing a Discount from a Discount Offer 16
Create Discount Offer Page Reference 16
General Information Section 17
Offer Settings Subsection 17
Product Specification Attributes Subsection 19

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Search for Discount Offers Dialog Box 19
Discounts Section 20
Create Discount Dialog Box 21
Search for Discounts Dialog Box 23
Search for Discount Selectors Dialog Box 24
New Date Range Dialog Box 25
Manage Date Ranges Dialog Box 25
Edit Date Range Dialog Box 25
Rule Details Section 26
Discount Details Dialog Box 34

6 Chargeshare Offers

Creating a Chargeshare Offer 1
Specifying General Information and Settings for a Chargeshare Offer 1
Adding Chargeshares to a Chargeshare Offer 2
Adding a New Chargeshare 2
Adding an Existing Chargeshare 3
Reordering ChargeShare Rules 3
Configuring Chargeshare Rules 4
Configuring Chargeshare Filters 4
Adding a New Chargeshare Filter 5
Adding an Existing Chargeshare Filter 5
Configuring Chargeshare Triggers 6
Adding a New Chargeshare Trigger 6
Adding an Existing Chargeshare Trigger 7
Adding a New Chargeshare Rule 7
Setting Up Pricing for a Chargeshare 7
Selecting Quantity Ranges 7
Adding Quantity Ranges to Chargeshare Pricing 8
Modifying Quantity Ranges in Chargeshare Pricing 9
Deleting Quantity Ranges 9
Adding Balance Impacts for Chargeshare Pricing 10
Identifying the Components That Use a Shared Chargeshare 11
Modifying Pricing without Inadvertently Affecting Other Components 11
Adding Date Ranges to a Chargeshare 11
Modifying or Deleting Date Ranges in a Chargeshare 12
Changing Chargeshare Details 12
Removing a Chargeshare from a Chargeshare offer 13
Create Chargeshare Offer Page Reference 13
General Information Section 13
Product Specification Attributes Subsection 14

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Offer Settings Subsection 14
ChargeShares Section 14
Create ChargeShare Dialog Box 15
Search for ChargeShares Dialog Box 16
New Date Range Dialog Box 16
Manage Date Ranges Dialog Box 17
Edit Date Range Dialog Box 17
Rule Details Section 17
ChargeShare Details Dialog Box 23

7 Subscription Terms

Creating a Subscription Term 1
Configuring Early Termination Fees 2
Create Terms Page Reference 3
Commitment Period 3
Early Termination of Contract 3
Auto Renew 4

8 Bundles

Creating a Bundle 1
Specifying Bundle General Information and Settings 1
Adding Terms to a Bundle 2
Adding an Offer to a Bundle 3
Customizing an Offer in a Bundle 3
Defining Dependencies for Bundles 5
Defining a Prerequisite Relationship Between Bundles 5
Defining a Mutually Exclusive Relationship Between Bundles 5
Defining Transition Rules for Bundles 6
Create Bundle Page Reference 7
General Information Section 7
Product Specification Attributes Subsection 7
Bundle Settings Subsection 7
Terms Section 8
Manage Bundle Content Section 9
Offer Customization Subsection 9
Search for Offers Dialog Box 13
Prerequisite Section 14
Search Bundles for Prerequisite Dialog Box 15
Mutually Exclusive Section 15
Search Bundles for Exclusivity Dialog Box 16

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Transition Rules for Eligible Bundles Section 17
Search Bundles for Transition Dialog Box 17

9 Packages

Creating a Package 1
Adding Services and Bundles 2
Creating a Service Group 3
Adding Balance Tracking Information 3
Assigning Services to Balance Groups 4
Deleting a Balance Group 4
Setting Credit Limits 4
Setting Credit Thresholds 5
Setting Loan Thresholds 5
Deleting a Credit Limit 6
Setting Consumption Rules 6
Deleting a Consumption Rule 6
Defining Transition Rules 6
Defining Generation Change Rules 7
Defining Discount Restrictions 8
Create Package Page Reference 9
General Information Section 9
Product Specification Attributes Subsection 10
Terms Section 10
Manage Package Content Section 10
Search for Bundles Dialog Box 10
Balance Groups Section 11
Transition Rules for Eligible Packages Section 13
Search Packages for Transition Dialog Box 14
Generation Change Rules for Eligible Packages Section 15
Search Packages for Generation Change Dialog Box 15
Manage Discount Restrictions Section 16
Search Discount Offers for Restriction Dialog Box 17

10 Package Lists

Creating a Package List 1
Create Package List Page Reference 2
General Information Section 2
Package List Content Section 2
Search for Packages Dialog Box 3

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11 Time Models

Creating a Time Model 1
Create Time Model Page Reference 2
- General Information Section 2
- Time Periods Section 3
- Manage Effective Periods Dialog Box 4
- Manage Time Periods Dialog Box 4

12 Charge Selectors

Creating a Charge Selector 1
- Specifying Charge Selector General Information 1
- Selecting Attributes for Charge Selector Rules 2
- Creating Charge Selector Rules 4

Create Charge Selector Page Reference 6
- General Information Section 6
- Rule Attributes Section 7
  - Selector Options Section 7
  - Select Fields for Rules Section 7
- Rules Section 8

13 Price Selectors

Creating a Price Selector 1
- Specifying Price Selector General Information 1
- Selecting Rule Attributes 2
- Creating Price Selector Rules 2

Create Price Selector Page Reference 3
- General Information Section 3
- Select Fields for Rules Section 3
- Rules Section 4
  - Pricing Details Section 5
  - Search for Pricing Dialog Box 6

14 Discount Selectors

Creating a Discount Selector 1
- Specifying Discount Selector General Information 1
- Selecting Rule Attributes 2
- Creating Discount Selector Rules 2

Create Discount Selector Page Reference 3
- General Information Section 3

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Select Fields for Rules Section 3
Rules Section 4
Search for Discounts Dialog Box 5

15 Generic Selectors

Creating a Generic Selector 1
Specifying Generic Selector General Information 1
Selecting Rule Attributes 2
Creating Generic Selector Rules 2
Create Generic Selector Page Reference 3
General Information Section 3
Select Fields for Rules Section 4
Rules Section 4

16 USC Selectors

Creating a USC Selector 1
Create USC Selector Page Reference 2
General Information Section 3
Rules and Conditions Section 3

17 APN Selectors

Creating an APN Selector 1
Create APN Selector Page Reference 2
General Information Section 2
Rules Section 2

18 Tax Selectors

Creating a Tax Selector 1
Specifying Tax Selector General Information 1
Selecting Attributes for Tax Selector Rules 2
Creating Tax Selector Rules 2
Create Tax Selector Page Reference 3
General Information Section 3
Rule Attributes Section 4
Rules Section 5
Manage Effective Periods Dialog Box 5

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19 Tax Exemption Selectors

Creating a Tax Exemption Selector 1
- Specifying Tax Exemption Selector General Information 2
- Selecting Attributes for Tax Exemption Selector Rules 2
- Creating Tax Exemption Selector Rules 3

Create Tax Exemption Selector Page Reference 4
- General Information Section 4
- Rule Attributes Section 4
- Rules Section 5
- Manage Effective Periods Dialog Box 6

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About This Content

This Help describes procedures and tasks for using Oracle Communications Billing and Revenue Management Pricing Design Center.

Audience

This Help is intended for pricing analysts and others involved in pricing and rating.

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1

Getting Started with Pricing Design Center

Oracle Communications Billing and Revenue Management Pricing Design Center (PDC) is a Web-based application used to create and manage product offerings. A product offering represents the services available to your customers and the price of those services. A service is a commodity, such as a mobile phone line or an Internet connection, that your customers can purchase and use. For an overview of product offerings, see *PDC Creating Product Offerings*.

For information on using PDC, see:

- Using the PDC User Interface
- Working with Pricing Design Center
- Using Keyboard Shortcuts

Using the PDC User Interface

The PDC user interface works entirely inside a single page display. You should not use your Web browser buttons, such as Back, Forward, and Refresh, to navigate within the page. If you use a Web browser button, you might lose the data you entered on the page. If a Web browser button is used accidentally, navigate to the main link, and log in to PDC again, if required.

Do not open multiple instances of PDC in different tabs of the same browser.

For more information about the PDC user interface, see:

- Supported Browsers
- About the Processing Indicator
- About Session Timeout
- Understanding the Workspace Page
- Closing a Tab
- Logging Out

Supported Browsers

For information about supported browsers, see *BRM Compatibility Matrix*.

You must have cookies enabled in your browser when using PDC.

About the Processing Indicator

The processing indicator is available at the upper-right corner of the page. The indicator shows the current state of PDC:

- **Idle:** The indicator is not spinning.
- **Processing:** The indicator is spinning (for example, PDC is searching for pricing components).

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About Session Timeout

Your interaction with PDC takes place in a session. Your PDC session starts as soon as you log in to the application. The session time is set to 10 minutes by default. If you do not interact with PDC for ten minutes, your session times out and the Page Expired dialog box appears. Click **OK** to log back in to PDC.

PDC displays a pop-up warning message two minutes before the session times out, giving you a chance to prevent session expiration.

You can change the session timeout settings for PDC from the Oracle WebLogic Remote Console. See Oracle WebLogic Remote Console Online Help for more information.

The following example shows how you can secure cookie, path, and cookie session timeouts by updating the following in the default **plan.xml** file within the **<deployment-plan>** element:

```
<application-name>PricingDesignCenter</application-name>
<variable-definition>
  <variable>
     <name>SessionDescriptor_TimeoutSecs</name>
     <value>36000</value>
  </variable>
  <variable>
     <name>SessionDescriptor_InvalidationIntervalSecs</name>
     <value>3000</value>
  </variable>
  <variable>
     <name>cookie-secure</name>
     <value>true</value>
  </variable>
  <variable>
     <name>cookie-path</name>
     <value>/pdc</value>
  </variable>
  <variable>
     <name>NewSessionValue</name>
     <value>100</value>
  </variable>
  <variable>
     <name>url-rewriting-enabled</name>
     <value>false</value>
  </variable>
  </variable-definition>
  <module-override>
  <module-name>pricingui.ear</module-name>
  <module-type>ear</module-type>
  <module-descriptor external="false">
     <root-element>weblogic-application</root-element>
     <uri>META-INF/weblogic-application.xml</uri>
     <variable-assignment>
       <name>SessionDescriptor_TimeoutSecs</name>
       <xpath>/weblogic-application/session-descriptor/timeout-secs</xpath>
     </variable-assignment>
     <variable-assignment>
```


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```
      <name>SessionDescriptor_InvalidationIntervalSecs</name>
      <xpath>/weblogic-application/session-descriptor/invalidation-interval-
secs</xpath>
    </variable-assignment>
    <variable-assignment>
      <name>cookie-secure</name>
      <xpath>/weblogic-application/session-descriptor/cookie-secure</xpath>
      <operation>add</operation>
    </variable-assignment>
    <variable-assignment>
      <name>url-rewriting-enabled</name>
      <xpath>/weblogic-application/session-descriptor/url-rewriting-enabled</
xpath>
      <operation>add</operation>
    </variable-assignment>
  </module-descriptor>
 </module-override>
 <module-override>
      <module-name>BPA.war</module-name>
      <module-type>war</module-type>
      <module-descriptor external="false">
         <root-element>weblogic-web-app</root-element>
         <uri>WEB-INF/weblogic.xml</uri>
         <variable-assignment>
            <name>NewSessionValue</name>
            <xpath>/weblogic-web-app/session-descriptor/timeout-secs</xpath>
         </variable-assignment>
         <variable-assignment>
           <name>cookie-path</name>
           <xpath>/weblogic-web-app/session-descriptor/cookie-path</xpath>
           <operation>add</operation>
      </variable-assignment>
    </module-descriptor>
 </module-override>
<config-root>{deployment_plan file location}</config-root>
</deployment-plan>
```

Understanding the Workspace Page

When you start PDC, it opens your workspace in the **Workspace** page. This page contains your changesets. A changeset is a group of pricing components that you manage and submit together.

> **Note**
>
> If no changeset is active after you log into PDC, you must either manually set the desired changeset as active or create a new changeset and make it active before performing any operations in the PDC application.

The **Workspace** page contains the following sections:

- Workspace task pane that allows you to add, delete, export, and import changesets.

  It displays the changesets in the following lists:

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  - **Open Changesets:** Displays changesets in the Open state. You can edit, validate, and submit open changesets.
  - **Pending Changesets:** Displays changesets that have been submitted and are waiting for transformation to be completed.
  - **Successfully Submitted Changesets:** Displays changesets that have been successfully submitted and the transformation is completed.
  - **Failed Changesets:** Displays changesets that have been submitted and have failed transformation.
- Changeset Details section that allows you to edit, validate, submit, or fix a changeset depending on its status. The table in this section displays the components in the selected changeset.

For more information about changesets, see "Changesets".

Related Topics

Specifying the Active Changeset

Creating a Changeset

Closing a Tab

To close a tab:

> **Note**
>
> You can close only the active tab. You cannot close the **Workspace** tab.

1. Hold the mouse over the tab name to display the **Close Tab** icon.

   The following figure shows the tab with the **Close Tab** icon:



2. Click the **Close Tab** icon.

Logging Out

To log out of PDC, on the top right of the PDC UI, click **Logout**.

Working with Pricing Design Center

The following topics explain how to work with PDC:

- Working with Pricing Components
- Searching for Pricing Components
- Saving a Pricing Component
- Viewing a Chart of Offers By Service
- Working with Tables

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- Setting Validity Periods
- Changing Your Password

Working with Pricing Components

Pricing components, such as charge offers, discount offers, bundles, packages, package lists, time models, and selectors, are used to create product offerings. You use Oracle Communications Pricing Design Center (PDC) to create, modify, delete, and validate pricing components.

See:

- Creating Pricing Components
- Modifying Pricing Components
- Deleting Pricing Components
- Validating Pricing Components

Related Topics

Working with Pricing Design Center

Creating Pricing Components

Before creating a pricing component, you must specify the active changeset. New pricing components are automatically added to your active changeset. See "Specifying the Active Changeset".

To create pricing components:

1. In the Pricing section of the navigation pane, click the link for the component you want to create.

   A page in which you configure the selected component appears.

   Asterisks (*) indicate required fields.
2. Configure the component.

   For configuration procedures, see the relevant topics in the PDC Help.
3. Save the component. See "Saving a Pricing Component".

   The component is added to the active changeset.

Related Topics

Working with Pricing Components

Modifying Pricing Components

To modify a pricing component:

1. In the Workspace task pane, select a changeset.

   The pricing components in the changeset are displayed in a table in the Changeset Details section.
2. Select a pricing component.

   The summary page of the pricing component appears in a read-only mode.

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3. Click **Edit**.

   The fields in the page are now editable.

4. Modify the component, and then click **Save and Done**.

   Your changes are saved, and the fields on the page become read-only.

Related Topics

Working with Pricing Components

Deleting Pricing Components

The criteria for deleting a pricing component are:

- You can delete a pricing component only if it is in the Draft status.
- You can delete a pricing component only if it is not referenced by any other components. For example, if a charge offer is referenced in a bundle, you cannot delete the charge offer. If you want to delete the charge offer, you should delete the bundle.
- You cannot delete a pricing component that is in the Promoted status.

To delete a pricing component:

1. Do one of the following:
   a. In the Workspace task pane, select a changeset.

      The pricing components in the changeset are displayed in a table in the Changeset Details section.

   b. Search for the pricing components. See "Searching for Pricing Components".

      The search results appear in the Results table.
2. Select one or more pricing components.
3. Click the **Delete** icon.

   The Remove selected pricing components dialog box appears. The tree in this dialog box lists the selected pricing components and any dependent pricing components of the selected pricing component.
4. Click **Delete**.

   The selected pricing components are deleted from the table in the Changeset Details section and from the changeset.

Related Topics

Working with Pricing Components

Obsoleting Pricing Components

The criteria for obsoleting pricing components are:

- You can obsolete a pricing component only if it is in the Promoted status.
- You can obsolete a pricing component only if it is not referenced by any other components. For example, if a charge offer is referenced in a bundle, you cannot obsolete the charge offer.
- You can obsolete an offer if it is not subscribed by a customer.

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- If you obsolete a charge offer, the referenced component of the charge offer such as charges are also obsoleted only if they are not being referenced in any pricing components. The obsoleted charges are moved to the changeset.

> **Note**
>
> Before obsoleting an offer in PDC, you must manually verify in BRM and ECE that the offer is not subscribed by customers.
>
> Obsoleting offers subscribed by customers can affect usage ratings.

To obsolete a pricing component:

1. Search for the pricing components in the Promoted status. See "Searching for Pricing Components".

   The search results appear in the Results table.

2. Select the pricing component.

   The summary page of the pricing component appears in a read-only mode.

3. Click **Obsolete**.

   The **Obsolete** dialog box appears with the list of referenced components.

4. Do one of the following:

   a. If you want to obsolete the pricing component with its referenced components, click **Yes**.

      The obsoleted pricing component with its referenced components are marked with delete icon in the **Changeset Details** section. When you delete the pricing component and submit the changeset, this component is obsoleted and removed from the PDC user interface. You cannot view the obsoleted components in the PDC user interface.

   b. If you do not want to obsolete the pricing component, click **No**.

   After you obsolete the pricing components, ensure that you do the following:

   a. Delete the obsolete components in BRM by using the **loadPriceList** utility. For example, to delete a charge offer from the BRM database, run the following command:

      ```
      loadpricelist

      delete product chargeoffername=OBSOLETED=timestamp
      ```

      The obsoleted components are stored in BRM in the following format:

      ```
      PricingComponent=OBSOLETED=<timestamp>.
      ```

      You can use this format to search for the obsoleted components in BRM.

      For more information, see the discussion about the **loadPriceList** utility in *BRM Setting Up Pricing and Rating*.

   b. Delete the obsolete components in the ECE cache by restarting the ECE server. For more information, see the discussion about starting and stopping ECE in *ECE System Administrator's Guide*.

Related Topics

Working with Pricing Components

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Validating Pricing Components

Before a pricing component can be submitted by PDC, it must be validated. When you submit a changeset, PDC validates all the components in the changeset. See "Submitting a Changeset".

Optionally, you can click **Validate** to validate an individual pricing component or a changeset containing multiple pricing components. See "Validating a Changeset".

To validate a pricing component:

1. In the Workspace task pane, select a changeset.

   The pricing components in the changeset are displayed in a table in the Changeset Details section.

2. In the **Name** column, click the link of the pricing component that you want to validate.

   The summary page of the pricing component appears in a read-only mode.

3. Click **Validate**.

   If no validation errors are found, the message "Validation Successful: No Errors Found" appears below the **Validate** button.

   If validation errors are found, the Validation Errors section listing the validation errors appears at the bottom of the page.

Related Topics

Working with Pricing Components

Searching for Pricing Components

PDC supports the following searches:

- **Basic:** Enables you to use the component type and name to search for a specific pricing component. See "Basic Search".
- **Advanced:** Enables you to use additional criteria to search for a specific pricing component. See "Advanced Search".
- **Saved:** Enables you to save a search criteria and reuse it. See "Saved Search".
- **Contextual:** Enables you to search components within the context of another component. See "Contextual Search".
- **Used By:** Enables you to search for references of a pricing component in other pricing components. See "Used By Search".
- **Query-by-Example:** Enables you to search records that match specified criteria in a table. See "Query-by-Example Search".

Related Topics

Working with Pricing Design Center

Basic Search

The default search mode, Basic, offers the most commonly used search criteria.

To perform a Basic search:

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1. In the Search Pricing section, select a pricing component from the **Search** list.
2. In the **Name Contains** field, enter the full or partial name of the component you want to search. You can use an asterisk (*) as a wildcard to substitute for one or more characters.

> **Note**
>
> Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

3. Click the **Search** icon.

   The **Search** page appears.
4. From the **Phase** list, select the status of the component. The default is **Draft or Promoted**.
5. (Optional) Enter additional search criteria.
6. (Optional) From the **Add Fields** menu, select additional fields to use as search criteria.
7. Click **Search**.

   The search results appear in the Results table.

Related Topics

Search Page Reference

Searching for Pricing Components

Advanced Search

The Advanced search widens the search by providing other options and by allowing you to add search fields. By default, the Advanced search displays the Saved search that is set as default. See "Saved Search" for more information on Saved searches.

To perform an Advanced search:

1. In the Search Pricing section, click **Advanced**.

   The **Search** page appears.
2. Select the search criteria, such as **Pricing Component** and **Phase**.
3. (Optional) From the **Add Fields** menu, select additional fields to use as search criteria.

> **Note**
>
> When entering search criteria in the **Name** and **Description** fields, you can use an asterisk (*) as a wildcard to substitute for one or more characters.

4. Click **Search**.

   The search results appear in the Results table.

Related Topics

Search Page Reference

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Searching for Pricing Components

Saved Search

The Saved search enables you to save a search criteria for a later use. This may be useful when you frequently use a particular search criteria.

To create a Saved search:

1. Perform a Basic or Advanced search. See "Basic Search" and "Advanced Search".
2. Click **Save**.

   The Create Saved Search dialog box appears.
3. Enter a name for the Saved search.
4. (Optional) To set this search as the default search, select **Set as Default**.

   A Saved search set as default opens whenever you use the Advanced search.
5. (Optional) To run this search query automatically without clicking **Save**, select **Run Automatically**.
6. Click **OK**.

   The newly created Saved search is added to the **Saved Searches** list in the Search Pricing section and the **Saved Search** list in the **Search** page.

To use a Saved search:

1. In the Search Pricing section, from the **Saved Searches** list, select a Saved search.

   The **Search Saved Searches** icon is enabled.
2. Click Search Saved Searches.

   A **Search** page appears with the saved search criteria and their values.

   If **Run Automatically** option is set for this Saved search, the search is performed automatically and the search results appear in the Results table.

   If **Run Automatically** option is not set for this Saved search, click **Search** to perform the search.

To delete a saved search:

1. In the Search Pricing section, select a saved search from the **Saved Searches** list.
2. Click on the arrow next to the name of the saved search.

   A **Search** page appears with the saved search criteria and its values.
3. From the **Saved Search** list on the top right of the page, select **Personalize**. The Personalize Saved Searches dialog box appears.
4. Click **Delete**. A Warning dialog box appears.
5. Click **Yes**.

Related Topics

Search Page Reference

Searching for Pricing Components

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Contextual Search

Contextual searches are performed when you create or edit a pricing component. For example, when adding a charge offer to a bundle, you perform a search for the charge offer.

The criteria for Contextual searches are:

- The result of the Contextual search varies depending on when it is used:
  - If it is used when creating a new pricing component, the search returns all the Draft components from the active changeset and all the Promoted components from all the available changesets.
  - If it is used when editing an existing pricing component, the search returns all the Draft components from the current changeset of the object even if it is not set as active, and all the Promoted components from all the available changesets.
- You cannot save the search criteria of a Contextual search.

Related Topics

Searching for Pricing Components

Used By Search

The Used By search enables you to search for references of a pricing component in other pricing components. For example, before modifying a pricing component, you can use the Used By search to discover all the pricing components that use this pricing component.

The criteria for Used By searches are:

- The Used By search returns only the parent-child references for a pricing component. For example, Bundle1 is set to transition to Bundle2 and has a mutually exclusive relationship with Bundle3. Package1 contains Bundle1. When you perform the Used By search on Bundle1, only Package1 appears in the hierarchical view; Bundle2 and Bundle3 do not appear, although, they are used in setting up Bundle1.
- The hierarchical view displays the pricing components in Draft or Promoted status. The used-by references for components in Draft or Promoted status are shown in different colors. If the same component is found in both Draft and Promoted status, only the component in Draft status appears in the hierarchical view.
- For components in Draft status, the Used By search is performed on all the changesets of the current user.
- For components in Promoted status, the Used By search is performed on the current user's changeset and returns the components in Draft and Promoted statuses that are referenced by this component.
- If a component is referenced more than once in another pricing component, the Used By search returns only one instance of the component. For example, if a charge offer is used thrice in the same bundle, the Used By search on the charge offer returns only one instance of the bundle.

To use a Used By search:

1. In the summary page of a pricing component that supports the Used By search, click the **Used By** button.

   The **Used By:** *PricingComponentName* page appears, where *PricingComponentName* is the name of the pricing component. This page displays the references of the current

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pricing component in other pricing components in a hierarchical view. Initially, the hierarchical view displays only the immediate parents.

2. Expand the nodes to display the used-by references.

Related Topics

Searching for Pricing Components

Query-by-Example Search

The Query-by-Example (QBE) search provides you a graphical interface to create database queries without actually writing the queries in a query language. You can enter the values in the QBE fields to search for records that match specified criteria in a table.

In the back end, PDC generates a query by appending the values entered in the QBE search fields using the AND operator.

The QBE fields appear above the table that supports QBE; one QBE field per column.

To perform a QBE search:

1. Enable the QBE bar. See "Enabling the Query-by-Example Bar".
2. Enter the values in the QBE fields.
3. Click the **Search** icon on the table toolbar, or press the **Enter** key while the focus is in one of the QBE fields.

   The search results appear in the Results table.

Related Topics

Searching for Pricing Components

Search Page Reference

Use the **Search** page to search for a pricing component.

The fields displayed on this page are determined by the type of search you perform.

Table 1-1 Transitions Section

Field	Description
Pricing Component	Select the type of pricing component that you want to search.
Phase	Select the status of the pricing component: • **Draft:** The pricing component has not been published to Oracle Communications Billing and Revenue Management (BRM). It is still part of a changeset in PDC. • **Promoted:** The pricing component has been published to BRM. It is no longer part of a changeset in PDC. • **Draft or Promoted:** Pricing component is either in the Draft or Promoted status.
Name	(Optional) Enter a full or partial name of the component to search for. You can use an asterisk (*) as a wildcard to substitute for one or more characters. Select an operator from the operator list and enter a value in the field next to the operator list.

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Table 1-1 (Cont.) Transitions Section

Field	Description
Applicable To	Select the service associated with the pricing component.
Event	Select the event type to which any of the selectors (APN, charge, discount, price, or USC) applies.
Charge Type	Select the event to which the charge applies.
Measured By	Select the ratable usage metrics (RUMs) to apply to the charge.
Pricing Profile	Select a pricing profile for the charge, time model, or any of the selectors (APN, charge, discount, price, or USC).
Saved Search	Displays the saved search that is set as default. You can select any other saved search from the list.

Results Table

The Results table lists the pricing components that meet the search criteria.

Table 1-2 Results Table

Field	Description
Name	Lists the pricing components that meet the search criteria.
Description	Displays the description of each pricing component.
Phase	Displays the status of the pricing components. • **Draft:** The pricing component has not been published to BRM. It is still part of a changeset in PDC. • **Promoted:** The pricing component has been published to BRM. It is no longer part of a changeset in PDC.
Applicable To	Displays the service associated with the pricing component.
Event	Displays the event type to which any of the selectors (APN, charge, discount, price, or USC) applies.
Charge Type	Displays the event to which the charge applies.

Related Tasks

Searching for Pricing Components

Saving a Pricing Component

You can save a pricing component by using the following buttons:

- **Save:** Saves the component but the component remains editable. Use this button if you have not finished setting up your component but want to save your work without committing it to the database.
- **Save and Done:** Saves the component and makes it read-only. Use this button if you want your component to be available in the PDC database.
- **Finish:** Saves the component and displays the summary page. You can modify the component from this page, if required.

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- **Save As:** Makes a copy of the current component. Use this button if you want to use the settings of the current component for a new component. Clicking this button opens the Save As dialog box. Enter a unique name for the component and click **OK**. The summary page of the new component appears. You can modify the new component from this page, if required.

  > **Note**
  >
  > Use this button if you want to use the settings of the current component including the referenced components for a new component.

Related Topics

Working with Pricing Design Center

Viewing a Chart of Offers By Service

You can generate and view a chart that displays the number of offers, bundles, and packages for each service.

To view a chart of offers by service:

- In the Pricing section of the navigation pane, under **Analytics**, click **Offers by Service**.

  The Offers By Service page appears, displaying a bar chart. Each bar represents the number of promoted bundles, packages, charge offers, and discount offers for a given service.

  If a package has multiple services, the package is included in the count for each service.

Working with Tables

Each table has a toolbar. The toolbar provides options to perform some or all of the following activities:

- Sorting Data in Tables
- Detaching and Attaching Tables
- Adding or Removing Table Columns
- Reordering Table Columns
- Adding Rows to a Table
- Deleting Rows from a Table
- Enabling the Query-by-Example Bar

Sorting Data in Tables

All table sort operations in PDC are case-sensitive.

To sort data in table columns:

- Hover the pointer over a column header to display arrows for sorting data, and then select the up arrow (ascending sort) or down arrow (descending sort).

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Detaching and Attaching Tables

You can detach a table to appear in a separate screen. Using a detached table you can increase the number of visible rows.

- **To detach a table**: In the table toolbar, click the **Detach** icon, or from the **View** menu, select **Detach**. The table is displayed on a separate screen. The **Detach** icon changes to indicate that the table is detached.
- **To attach a table**: In the table toolbar, click the **Detach** icon, or from the **View** menu, select **Attach**. The table is reattached to the tab.

Adding or Removing Table Columns

To add or remove table columns:

1. From the **View** menu, select **Columns**.
2. From the column list, select or deselect a column name.

   The column is added or removed from the table.

Reordering Table Columns

To reorder table columns:

1. From the **View** menu, select **Reorder Columns**.

   The Reorder Columns dialog box appears.
2. In the **Visible Columns** list, select a column name and use the arrows to move the column up or down.

   You can also move the selected column to the top or bottom of the list.
3. Click **OK**.

Adding Rows to a Table

To add rows to a table:

1. In the table toolbar, click the **Add** icon.

   A new row is added to the table. If an existing row was selected when you clicked Add, the new row is added below the selected row. If no row is selected, the new row is added at the bottom of the table.

Deleting Rows from a Table

To delete rows from a table:

1. Select the row that you want to delete from the table.
2. In the table toolbar, click the **Delete** icon.
3. In the confirmation dialog box, click **OK**.

   The selected row is deleted from the table.

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Enabling the Query-by-Example Bar

Some of the tables in the PDC UI support the Query-by-Example (QBE) search. To use the QBE search, you must enable the QBE bar.

To enable the QBE bar, do one of the following:

> **Note**
>
> These actions toggle the display of the QBE bar.

- Click the **Show/hide filter bar** icon:



- From the **View** menu, select **Show/hide filter bar**.

Related Topics

Query-by-Example Search

Setting Validity Periods

A validity period specifies when the component is available for purchase or when it is valid to use within a particular context. By default, these periods start immediately and never end.

To change the default start or end date of a validity period:

1. Deselect the appropriate check box:
   - **Immediately** (for start dates)
   - **Never** (for end dates)
2. Click the date-and-time icon next to the **Start** or **End** field.

   A dialog box to select date and time appears.
3. Select the appropriate month, year, day, and time.
4. Click **OK**.

   The selected date and time are added to the **Start** or **End** field.

To reinstate the default start or end dates, select the **Immediately** or **Never** check boxes.

Changing Your Password

You can change your PDC password from the Oracle WebLogic Remote Console. See Oracle WebLogic Remote Console Online Help for more information.

Using Keyboard Shortcuts

You can use keyboard shortcuts for many actions in Pricing Design Center.

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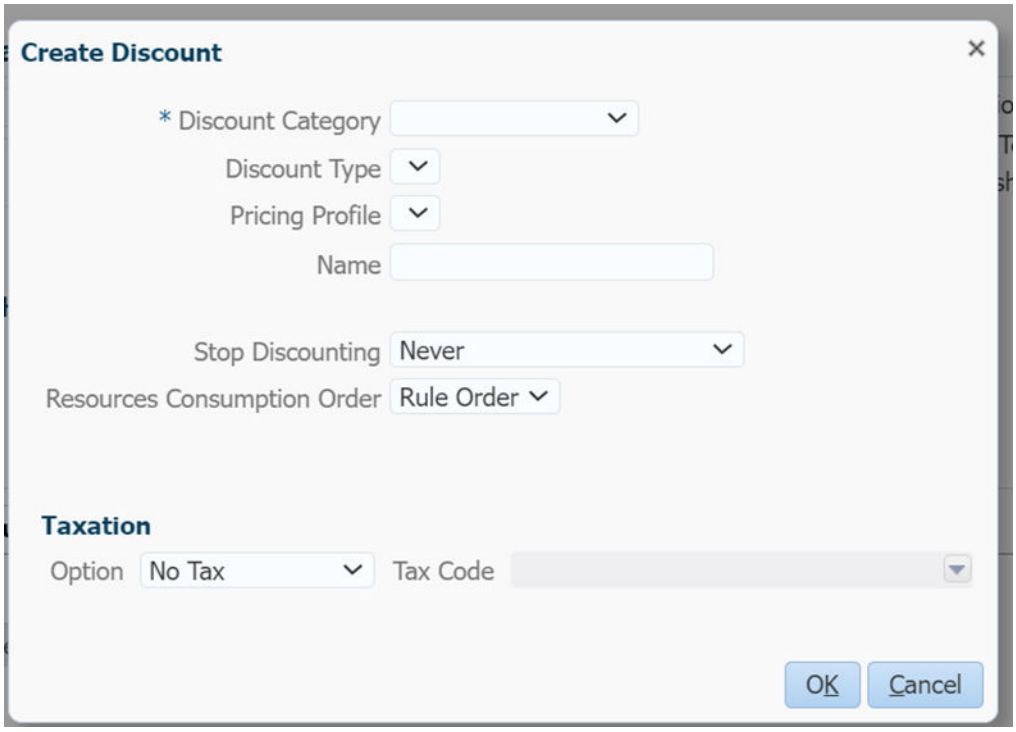
Action	Shortcut
Move focus to the next field or element from top to bottom and left to right.	**Tab**
Move focus to the previous field or element, from bottom to top and right to left.	**Shift** + **Tab**
Click a link, a button, or a command on a menu.	**Enter**
In a table, move to the next row. In a drop-down list, move to the next item in the list.	**Down Arrow**
In a table, move to the previous row. In a drop-down list, move to the previous item in the list.	**Up Arrow**

You can use access keys to select from multiple options. The keyboard shortcut is **Alt** + the underlined character for the corresponding option.

For example, in the following dialog box:

- The shortcut for **OK** is Alt+K.
- The shortcut for **Cancel** is Alt+C.

Figure 1-1 Keyboard Shortcuts for Dialog Box



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Note

For Firefox, use Alt+Shift+Access Key.

For MacOS, use the Ctrl key instead of the Alt key.

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2

Setup Components

Setup components are the prerequisite data that you configure before creating product offerings. For example, before creating product offerings, you must configure the ratable usage metrics (RUMs) that define how to measure events.

You can create the following setup components in the Oracle Communications Pricing Design Center (PDC) UI:

- Service-event maps. See "Creating Service-Event Maps".
- RUMs. See "Creating a RUM Configuration".
- Impact categories. See "Creating Impact Categories for Zones".
- Balance elements. See "Creating Balance Elements".
- (Optional) Zone models. See "Creating Zone Models".
- Policy specifications. See "Configuring Policy Specifications".
- Item type selectors. See "Configuring Item Type Selectors".
- (Optional) Special day calendars. See "Creating Special Day Calendars".
- (Optional) Custom analyzer rules. See "Creating Custom Analyzer Rules".
- Tax codes. See "Creating Tax Codes".
- Tax exemption codes. See "Creating Tax Exemption Codes".

> **Note**
>
> You need to configure the optional setup components only if you plan to use the related feature or perform certain business functions. For example, you configure a zone model only if you use zoning to determine a price in your charge offer.

See the discussion about configuring setup components in *PDC Creating Product Offerings* for more information about other setup components that are required for creating product offerings in PDC and how to configure them by using the **SyncPDC** and **ImportExportPricing** utilities.

Creating Service-Event Maps

A service-event map defines which events can be used for a service and which ratable usage metrics (RUMs) can be used for each service-event combination. These maps determine which events are available when you define charge and discount offers.

To create service-event maps:

1. In the Setup section of the navigation pane, under **Pricing Elements**, click **Service-Event Map**.

   The **Service-Event Map** page appears.

2. In the Service-Event Map section, select **Service-Event Map** and then click the **Add** icon.

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The Add Service or Account dialog box appears.

3. From the **Service** list, select a service or select **Account** and click **OK**.

   The selected service or **Account** is added under **Service-Event Map**.

4. Select a service or select **Account** and then click the **Add** icon.

   The Add Events dialog box appears.

5. Select the events to map to the service or select **Account** and click **OK**.

   You must map at least one event to the service you added or to **Account**.

   The selected events appear under the selected service or **Account**.

6. Select an event and then click the **Add** icon.

   The Map RUMs dialog box appears.

7. In the **RUM** column, select the RUMs to map to the event.

   Optionally, you can click **New RUM** to create a RUM configuration. See "Creating a RUM Configuration".

   You must map at least one RUM to each event that is added.

8. For each selected RUM, in the **Expression** field, enter the expression that indicates the quantity of the event.

   Optionally, you can click the **Edit** icon next to the **Expression** field and use the RUM Expression Builder to build the RUM expression.

   > **Note**
   >
   > You must ensure that the RUM expression that you enter is valid for the rating system in which the RUM is used.

9. Click **OK**.

   The selected RUMs appear under the selected event.

10. Click **Submit**.

Related Topics

Service-Event Map Page

Map RUMs Dialog Box

RUM Expression Builder Dialog Box

New RUM Dialog Box

Service-Event Map Page

Use the **Service-Event Map** page to map events to services or to **Account** and map RUMs to events. These mappings are used to define charge and discount offers.

Expand the service node to display the events mapped to that service.

Expand the event node to display the RUMs mapped to that event.

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Related Tasks

Creating Service-Event Maps

Map RUMs Dialog Box

Use the Map RUMs dialog box to map RUMs to an event and configure the RUM expression for measuring the event.

Field	Description
RUM	Displays the available RUMs for the selected event. Select the RUMs to map to the event.
Expression	Enter the expression that indicates the quantity of the event. For example, to calculate the duration quantity, you might reference the start and end fields in the event with the expression **End Time - Start Time**. Optionally, you can click the **Edit** icon and use the RUM Expression Builder to build the expression.
New RUM	Click this button to create a RUM configuration.

Related Tasks

Creating Service-Event Maps

RUM Expression Builder Dialog Box

Use the RUM Expression Builder dialog box to build the expression for measuring the event for the selected RUM.

Field	Description
Mathematical Elements Toolbar	Click any of the mathematical elements to add them to the **Expression** field.
Field	Select a field to add it to the **Expression** field.
Expression	Displays the RUM expression that indicates the quantity of the event. **Note:** You must ensure that the RUM expression is a valid expression for the rating system in which the RUM is used.

Related Tasks

Creating Service-Event Maps

New RUM Dialog Box

Use the New RUM dialog box to create a RUM configuration.

Field	Description
Name	Enter a unique name for the RUM.
Code	Enter a unique reference code for the RUM.
Units	Select the units of measurement to use for measuring the event. For RUMs of type **Conditional**, this field is not applicable.

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Field	Description
Rounding	(Optional) Select the rounding method to use for the event usage.
Type	Select one of the following RUM types: • **Whole:** Select this type if the RUM cannot be split; for example, Occurrence. • **Partial:** Select this type if the RUM can be split; for example, Duration. • **Conditional:** Select this type to configure charges with conditional balance impacts. You can change the RUM type only when the RUM is not used in any other components.

Related Tasks

Creating a RUM Configuration

Creating Service-Event Maps

Configuring Conditional Balance Impacts

Creating a RUM Configuration

To create a RUM configuration, you must first map the services to the events, and then map the RUMs to the events. See "Creating Service-Event Maps".

To create a RUM configuration:

1. In the Service-Event Map section of the **Service-Event Map** page, select an event and then click the **Add** icon.

   The Map RUMs dialog box appears.
2. Click **New RUM**.

   The New RUM dialog box appears.
3. In the **Name** field, enter a unique name for the RUM.
4. In the **Code** field, enter a unique reference code for the RUM.
5. From the **Units** list, select the unit of measurement to use for measuring the event.

   This step does not apply for RUMs of type **Conditional**.
6. (Optional) From the **Rounding** list, select the rounding method to use for the event usage.
7. From the **Type** list, select the RUM type.
8. Click **OK**.

Related Topics

Creating Service-Event Maps

Creating Impact Categories for Zones

You use impact categories to determine a price in a charge offer. An impact category represents a combination of event, service, or account attributes.

To create impact categories for zones:

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1. In the Setup section of the navigation pane, under **Pricing Elements**, click **Impact Categories**.

   The **Impact Categories** page appears.
2. In the Impact Categories for Zones section, click the **Add** icon in the table toolbar.

   An editable row is added.
3. In the **Name** column, enter a unique name for the impact category.
4. In the **Description** column, enter a description for the impact category.
5. (Optional) To use the impact category as a result in a Usage Scenario (USC) selector and an Access Point Name (APN) selector, select the **Derived Only** check box.

   See "About Impact Categories for Zones" for information about different uses of impact categories for zones.
6. Click **Submit**.

   The impact category is added to the table in the Impact Categories for Zones section.

Related Topics

Impact Categories for Zones Section

About Impact Categories for Zones

Impact categories for zones are used as follows:

- **Base** zone impact categories are used as results in zone models. You can also use them as results in USC and APN selectors.
- **Derived Zone** impact categories are used as results in USC and APN selectors. They are considered derived because the rules in USC and APN selectors take base zone impact categories and remap them, resulting in new impact categories.

  For example, a USC selector rule might specify that if the base zone impact category is China and the usage type is Friends & Family, the selector returns the Friends & Family derived zone impact category.

Impact Categories Page Reference

Use the **Impact Categories** page to create impact categories for zones.

For a description of the fields, see:

- Impact Categories for Zones Section

Impact Categories for Zones Section

Use the Impact Categories for Zones section to create impact categories for zones.

Click the **Add** icon in the table toolbar to add an impact category.

Column	Description
Name	Enter a unique name for the impact category
Description	Enter a description for the impact category.

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Column	Description
Derived Only	(Optional) Select the check box to use this impact category only in the USC and APN selectors.

Related Tasks

Creating Impact Categories for Zones

Creating Balance Elements

A balance element represents a currency or noncurrency asset of economic value, such as U.S. dollars or included minutes. When you configure pricing in a charge, you specify the balance elements that are debited or credited when the charge offer is used to rate an event. For example, a charge of one dollar per minute for a phone call affects the US Dollars balance element.

To create a balance element, see:

- Creating Currency Balance Elements
- Creating Noncurrency Balance Elements

Creating Currency Balance Elements

To create currency balance elements:

1. In the Setup section of the navigation pane, under **Pricing Elements**, click **Balance Elements**.

   The **Balance Elements** page appears. See "Balance Elements Section" for details.

2. In the Balance Elements section, click the **Add Currency Balance Element** icon in the table toolbar:

   A new row is added to the balance elements table. See "Balance Elements Table" for details.

3. In the **Name** column, select a currency name.

   The default reference code, numeric code, and symbol for the currency are automatically displayed.

   The **Temporary** and **Counter** columns are not applicable.

4. To use the balance element in a fold charge, select the check box in the **Can Be Folded** column.

5. To trigger notifications to customers when the balance element is about to expire, select the check box in the **Notify Before Expiration** column.

6. To trigger notifications to customers a set amount of time after the balance element has expired, select the check box in the **Notify After Expiration** column.

7. In the **Consumption Rule** column, select a consumption rule.

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8. Click **Save**.

   The currency balance element is saved in the balance elements table, and the default rounding rules for the currency balance element are saved in the rounding rules table. You cannot delete the default rounding rules.

9. To add rounding rules for specific events, see "Adding Rounding Rules for Specific Events".

Related Topics

Balance Elements Page Reference

Creating Noncurrency Balance Elements

To create noncurrency balance elements:

1. In the Setup section of the navigation pane, under **Pricing Elements**, click **Balance Elements**.

   The **Balance Elements** page appears. See "Balance Elements Section" for details.

2. In the Balance Elements section, click the **Add Noncurrency Balance Element** icon in the table toolbar:

   A new row is added to the balance elements table. See "Balance Elements Table" for details.

3. In the **Name** column, enter a unique name.
4. In the **Code** column, enter a unique reference code.
5. If you want to change the default numeric code, enter a unique reference code in the **Numeric Code** column.

   You can change the numeric code only before publishing the balance element.

6. In the **Symbol** column, enter a symbol.
7. To use the balance element for tracking balances temporarily while applying discounts to events, select the check box in the **Temporary** column.

   If you select this check box, rounding rules are not applicable.

8. To use the balance element as a counter, select the check box in the **Counter** column.
9. To use the balance element in a fold charge, select the check box in the **Can Be Folded** column.

   This column is disabled if the check box in the **Temporary** column is selected.

10. To trigger notifications to customers when the balance element is about to expire, select the check box in the **Notify Before Expiration** column.
11. To trigger notifications to customers after the balance element has expired, select the check box in the **Notify After Expiration** column.
12. In the **Consumption Rule** column, select a consumption rule.
13. Click **Save**.

    The noncurrency balance element is saved in the balance elements table.

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If you have not selected the check box in the **Temporary** column, the default rounding rules for the noncurrency balance element are saved in the rounding rules table. You cannot delete the default rounding rules.

14. To add rounding rules for specific events, see "Adding Rounding Rules for Specific Events".

Related Topics

Balance Elements Page Reference

Adding Rounding Rules for Specific Events

The Rounding Rules section displays the rounding rules for the balance element selected in the balance elements table. (See "Rounding Rules Section" for details.) You cannot delete the default rounding rules, but you can add new rounding rules for specific events.

To add rounding rules for specific events:

1. In the Rounding Rules section, click the **Add** icon in the table toolbar.

   The Processing Stage and Event Selection dialog box appears. See "Processing Stage and Event Selection Dialog Box" for details.
2. From the **Processing Stage** list, select a processing stage for the rounding rule.
3. From the **Event Category** list, select an event category.
4. From the **Event(s)** list, select the events.
5. Click **OK**.

   For each selected event, a rounding rule is added to the rounding rules table.
6. (Optional) If the selected events have child events, in the Rounding Rules section, select the check box in the **Apply To Child Events** column to use the balance element for both parent and child events.
7. (Optional) In the **Rounding Method** column, select a rounding method to use for the selected balance element.
8. (Optional) In the **Precision** column, enter the precision for rounding the balance element.
9. (Optional) In the **Tolerance Parameters** columns, enter the minimum and maximum tolerance values and the tolerance percentage that determines how the rounding rule will be applied to the balance element.
10. Click **Save**.

    The rounding rules are saved.

Related Topics

Rounding Rules Section

Balance Elements Page Reference

Use the **Balance Elements** page to create, modify, or delete currency or noncurrency balance elements and to add or delete rounding rules.

For a description of the fields, see:

- Balance Elements Section

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- Rounding Rules Section
- Processing Stage and Event Selection Dialog Box

Balance Elements Section

Use the Balance Elements section to create, modify, or delete currency or noncurrency balance elements.

See "Balance Elements Table" for information about the balance elements table.

Field	Description
Add Currency Balance Element 	Use to add a currency balance element.
Add Noncurrency Balance Element 	Use to add a noncurrency balance element.
Delete 	Use to delete a balance element.
Balance Element table	Use to configure balance elements.

Related Tasks

Creating Currency Balance Elements

Creating Noncurrency Balance Elements

Related Topics

Balance Elements Table

Balance Elements Table

Use the balance elements table in the Balance Elements section to configure balance elements. Each row in the table represents a balance element.

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Tip

You cannot delete a balance element that is referenced by other components. The **In Use** icon indicates that the balance element is referenced by other components and that it cannot be deleted:



Column	Description
Name	For a currency balance element, select a currency from the list. For a noncurrency balance element, enter a unique name.
Code	For a currency balance element, this column displays the default reference code: it is read-only. For a noncurrency balance element, enter a unique reference code for the balance element.
Numeric Code	Displays the numeric code for the currency or noncurrency balance element. You can change the default numeric code for a noncurrency balance element only.
Symbol	(Optional) For a currency balance element, this column displays the default currency symbol: it is read-only. For a noncurrency balance element, enter a symbol. You can enter any character string for this balance element.
Temporary	(Optional) For a noncurrency balance element, select the check box to use the balance element for tracking balances temporarily while applying discounts to events. See "About Using Temporary Balances in Discounts" in *PDC Creating Product Offerings*. If you select this check box, rounding rules are not applicable. If you do not select this check box, the default rounding rules for each processing stage are automatically added to the rounding rules table.
Counter	(Optional) For a noncurrency balance element, select the check box to use the balance element as a counter.
Can Be Folded	(Optional) Select this check box to use the balance element in a fold charge.
Notify Before Expiration	(Optional) Select this check box to send notifications to your customers when their balance (of this balance element) is about to expire.
Notify After Expiration	(Optional) Select this check box to send notifications to your customers several days, weeks, or months after their balance (of this balance element) has expired.
Consumption Rule	(Optional) Select a consumption rule for the balance element.

Related Tasks

Creating Currency Balance Elements

Creating Noncurrency Balance Elements

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Rounding Rules Section

Use the Rounding Rules section to add or delete rounding rules.

When you add a balance element, the default rounding rules for each processing stage are added to the rounding rules table. You cannot delete these rounding rules.

Select a balance element in the balance elements table and click **Add** or **Delete** icon in the rounding rules table toolbar to add or delete rounding rules.

Column	Description
Processing Stage	Displays the processing stage to which the rounding rule applies. For default rounding rules, this column is read-only.
Event Name	Displays the event to which the rounding rule applies. For default rounding rules, this column displays an asterisk (*), which indicates that the rounding rules will be applied to all the events.
Apply To Child Events	(Optional) If the selected event has child events, select this check box to use the balance element for both parent and child events. For default rounding rules, this column is read-only.
Rounding Method	(Optional) Select one of the following rounding methods to use for the balance element: • **Up:** If there is an additional digit, the last significant digit is always rounded up. For example, if rounding is set to two significant digits, 1.151 rounds to 1.16. • **Down:** If there is an additional digit, the last significant digit always remains the same. For example, if rounding is set to two significant digits, 1.159 rounds to 1.15. • **Even:** If there is an additional digit and the digit to the left is even, the last significant digit always remains the same. For example, if rounding is set to two significant digits, 10.154 rounds to 10.16 and 10.165 rounds to 10.16. • **Nearest:** If the additional digit is 0 through 4, the last significant digit remains the same. If the additional digit is 5 through 9, the last significant digit is rounded up. For example, 1.151 rounds to 1.15, and 1.159 rounds to 1.16.
Precision	(Optional) Enter the precision for rounding the balance element. For example, if the precision is 2, 1.1201 rounds to 1.12. **Note:** The precision must be between 0 and 15.
Tolerance Min	(Optional) Enter the minimum error tolerance for rounding the currency balance element.
Tolerance Max	(Optional) Enter the maximum error tolerance for rounding the currency balance element. For example, for Swiss Francs, if the minimum error tolerance is 2 and the maximum error tolerance is 3: • If a customer pays in euros for a 50 CHF charge, and the euro amount converts to 49 CHF, the payment is accepted. • If a customer pays in euros for a 50 CHF charge, and the euro amount converts to 46 CHF, the payment is not accepted. **Note:** The maximum tolerance value must be greater than the minimum tolerance value.

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Column	Description
Tolerance %	(Optional) Enter the error tolerance percentage for rounding the currency balance element. For example, if the tolerance percentage for Swiss Francs is 98%: • If a customer pays in euros for a 100 CHF charge, and the euro amount converts to 99 CHF, the payment is accepted. • If a customer pays in euros for a 100 CHF charge, and the euro amount converts to 97 CHF, the payment is not accepted. If you set both a tolerance percentage and a tolerance amount, the tolerance percentage overrides the tolerance amount. For example, if the tolerance percentage is 1% and the minimum error tolerance is 5. If the customer pays in euros for a 1000 CHF charge, and the euro amount converts to 992, the percentage tolerance is met, so the payment is accepted, even though the minimum error tolerance has not been met. **Note:** The tolerance percentage must be between 0 and 100.

Related Tasks

Adding Rounding Rules for Specific Events

Related Topics

Balance Elements Table

Processing Stage and Event Selection Dialog Box

Processing Stage and Event Selection Dialog Box

Use the Processing Stage and Event Selection dialog box to select a processing stage and the events for adding the rounding rules.

Field	Description
Processing Stage	Select the processing stage.
Event Category	Select an event category. This category determines which events are displayed in the **Event(s)** list. See "About Charge Categories" for descriptions of the categories.
Event(s)	Select the events for adding the rounding rules. **Note:** The **Event(s)** list displays only the events that are not associated with any processing stage.

Related Tasks

Adding Rounding Rules for Specific Events

Related Topics

Rounding Rules Section

Creating Zone Models

You can configure the following types of zone models:

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- **Standard Zone Model**: Associates the origin and destination area codes of a call to an impact category. See "Creating Standard Zone Models".
- **Geographical Zone Model**: Associates the distance between the origin and destination area codes of a call to an impact category. See "Creating Geographical Zone Models".

Creating Standard Zone Models

To create standard zone models:

1. In the Setup section of the navigation pane, under **Pricing Elements**, click **Zone Models**.

   The **Zone Models** page appears.
2. In the Zone Models section, click the **Add** icon in the table toolbar.

   An editable row is added.
3. In the Details section, enter a name and a description.
4. Under **Type**, select **Standard**.
5. Under the **Zone Rules** subtab, click the **Add** icon in the table toolbar.

   An editable row is added.
6. In the **Service Type** column, do one of the following:
   - Select the service type to which this zone rule applies.
   - Select the asterisk (*), which applies this zone rule to all the services.
7. In the **Origin** column, enter the call origin area code to associate with this zone rule.

   > **Note**
   >
   > The area code must include the international code.

8. In the **Destination** column, enter the call destination area code to associate with this zone rule.

   > **Note**
   >
   > The area code must include the international code.

9. In the **Results** column, under **Zone Impact Category**, select a zone impact category to associate with the call origin and call destination area codes. The impact category name is also the name of the zone.

   > **Note**
   >
   > The **Zone Impact Category** list shows only the base zone impact categories. This list is empty if no zone impact category is available. You must create the base zone impact category to proceed further. See "Creating Impact Categories for Zones".

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10. (Optional) In the **Results** column, under **Alternate Zone Model**, select an alternative zone model that can be used to determine the price of a call.

> **Note**
>
> The alternative zone model that you select must have at least one zone rule with the service type that matches with the service type selected for this zone model.

11. In the **Validity** column, enter the period for which this zone rule is valid. See "Setting Validity Periods" for information about setting the validity period.
12. (Optional) Add more zone rules to the standard zone model.
13. Click **Submit**.

    A standard zone model is added to the table in the Zone Models section.

Related Topics

Zone Models Page Reference

Creating Zone Models

Creating Geographical Zone Models

To create geographical zone models:

1. In the Setup section of the navigation pane, under **Pricing Elements**, click **Zone Models**.

   The **Zone Models** page appears.
2. In the Zone Models section, click the **Add** icon in the table toolbar.
3. In the Details section, enter a name and a description.
4. Under **Type**, select **Geographical**.
5. Under the **Zone Rules** subtab, click the **Add** icon in the table toolbar.

   An editable row is added.
6. In the **Service Type** column, do one of the following:
   - Select the service type to which this zone rule applies.
   - Select the asterisk (*), which applies this zone rule to all the services.
7. In the **Distance** column, enter the distance between call origin and call destination.
8. In the **Results** column, under **Zone Impact Category**, select an impact category that is assigned to the specified distance. The impact category name is also the name of the zone.

> **Note**
>
> The **Zone Impact Category** list shows only the base zone impact categories. This list is empty if no zone impact category is available. You must create the base zone impact category to proceed further. See "Creating Impact Categories for Zones".

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9. (Optional) In the **Results** column, under **Alternate Zone Model**, select an alternative zone model that can be used to determine the price of a call.

> **Note**
>
> The alternative zone model that you select must have at least one zone rule with the service type that matches with the service type selected for this zone model.

10. In the **Validity** column, enter the period for which this zone rule is valid. See "Setting Validity Periods" for information about setting the validity period.
11. (Optional) Add more zone rules to the geographical zone model.
12. Click the **Area Codes** subtab.
13. Click the **Add** icon in the table toolbar.

    An editable row is added.
14. In the **Prefix Area Code** column, enter the area code prefix.
15. In the **Latitude** column, enter the latitude for the specified area code.
16. In the **Longitude** column, enter the longitude for the specified area code.
17. In the **Validity** column, enter the period for which this mapping is valid. See "Setting Validity Periods" for information about setting the validity period.
18. (Optional) Add more area code combinations for this geographical zone model.
19. Click **Submit**.

    A geographical zone model is added to the table in the Zone Models section.

Related Topics

Zone Models Page Reference

Creating Zone Models

Zone Models Page Reference

Use the **Zone Models** page to add and create zone models.

For a description of the fields, see:

- Zone Models Section
- Details Section
- Zone Rules Subtab for Standard Zone Model
- Zone Rules Subtab for Geographical Zone Model
- Area Codes Subtab

Zone Models Section

Use the Zone Models section to add zone models.

Click the **Add** icon in the table toolbar to add a zone model.

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Column	Description
Name, **Description**	Displays the name and the description of the zone model added in the Details section.
Type	Displays the type of the zone model added in the Details section.

Related Tasks

Creating Standard Zone Models

Creating Geographical Zone Models

Details Section

Use the Details section to provide general information for the zone model.

The Details section also contains the **Zone Rules** subtab and, for geographical zone models, the **Area Codes** subtab.

For a description of the fields, see:

- Zone Rules Subtab for Standard Zone Model
- Zone Rules Subtab for Geographical Zone Model
- Area Codes Subtab

Field	Description
Name, **Description**	Enter a unique name and a unique description for the zone model
Type	Select the zone model type: • **Standard** to create a standard zone model. • **Geographical** to create a geographical zone model.

Related Tasks

Creating Standard Zone Models

Creating Geographical Zone Models

Zone Rules Subtab for Standard Zone Model

Use the **Zone Rules** subtab to add rules that associate origin and destination area codes to impact categories.

Column	Description
Service Type	Select the service type to which this zone rule applies. Select the asterisk (*) to apply this zone rule to all the services.
Origin	Enter the call origin area code to associate with this zone rule. Include the international code.
Destination	Enter the call destination area code to associate with this zone rule. Include the international code.

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Column	Description
Results	Select the base zone impact category to associate with the call origin and call destination area codes. The impact category name is also the name of the zone. (Optional) Select the alternative zone model that can be used to determine the price of a call. You specify an alternative zone model when you create zone hierarchies.
Validity	Specify the period for which this zone rule is valid. Enter the start and end dates for this zone rule.

Related Tasks

Creating Standard Zone Models

Zone Rules Subtab for Geographical Zone Model

Use the **Zone Rules** subtab to add rules that associate distances between origin and destination area codes to impact categories.

Column	Description
Service Type	Select the service type to which this zone rule applies. Select the asterisk (*) to apply this zone rule to all the services.
Distance	Enter the distance between call origin and call destination.
Results	Select the base zone impact category, which is also the name of the zone, that is assigned to the specified distance. (Optional) Select the alternative zone model that can be used to determine the price of a call. You specify an alternative zone model when you create zone hierarchies. See *PDC Creating Product Offerings* for more information on alternative zone models.
Validity	Specify the period for which this zone rule is valid. Enter the start and end dates for this zone rule.

Related Tasks

Creating Geographical Zone Models

Area Codes Subtab

Use the **Area Codes** subtab to add a set of mappings that associate area codes to their respective latitude and longitude coordinates for geographical zone models.

Column	Description
Prefix Area Code	Enter the area code prefix. You can create multiple geographical zones within a single area code by mapping different combinations of longitude and latitude coordinates to that area code.
Latitude	Enter the latitude for the specified area code. The range for valid latitude values is -90 through 90.
Longitude	Enter the longitude for the specified area code. The range for valid longitude values is -180 through 180.

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Column	Description
Validity	Specify the period for which this mapping is valid. Enter the start and end dates for this mapping.

Related Tasks

Creating Geographical Zone Models

Related Topics

Setting Validity Periods

Configuring Policy Specifications

A *policy specification* is made up of one or more counter policies each of which defines a gradation in the QoS based on the subscriber's service usage. For example, you can have a policy specification called *Platinum* for a data service and a balance element for it as *Megabytes Used*. You can define a counter policy labeled *Fair Usage*, which has three levels, *Low QoS*, *Medium QoS*, and *High QoS*, with each level containing a usage range valid for that quality of service, such as *100-150*, *150-200*, and *200-No Maximum* megabytes.

See the discussion about policy specifications in PDC User's Guide for more information.

To configure policy specifications by using the PDC user interface:

1. In the Setup section of the navigation pane, under **Pricing Elements**, click **Policy Specifications**.

   The Policy Specifications page appears.
2. Specifying general information for a policy specification. See "Specifying General Information for a Policy Specification" for more information.
3. Create policy labels. See "Creating Policy Labels" for more information.
4. Create counter policies. See "Creating Counter Policies" for more information.

Related Topics

Policy Specifications Page Reference

Specifying General Information for a Policy Specification

To specify general information for a policy specification:

1. In the Policy Specifications section, click the **Add** icon in the table toolbar.

   A new row is added.
2. In the **Name** column, enter a unique name for the policy specification.
3. In the **Description** column, enter a description for the policy specification.

Creating Policy Labels

To create a policy label:

1. In the Counter Policies section, click the **Add** icon in the table toolbar.

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The Create Counter Policy dialog box appears.

2. From the **Policy Label** list, select **Create**….

   The Create Policy Label dialog box appears.

3. In the **Name** field, enter a unique name for the policy label.
4. In the Sub-Labels section, click the **Add** icon in the table toolbar.

   A new row is added.

5. In the **Label** column, enter a unique name for the sublabel.

   You can add additional sub labels by repeating steps 4 and 5.

6. Click **OK**.

Related Topics

Create Policy Label Dialog Box

Creating Counter Policies

To create a counter policy:

1. In the Counter Policies section, click the **Add** icon in the table toolbar.

   The Create Counter Policies dialog box appears.

2. From the **Policy Label** list, select a policy label or create a new policy label. See "Creating Policy Labels" for more information.
3. From the **Unit** list, select the unit to be used for measurement.
4. From the **Balance Element** list, select a balance element to which the counter policy must be applied.

   > **Note**
   >
   > The **Balance Element** list displays only the noncurrency balance elements. You can add only one counter policy for a balance element in a policy specification.

5. Click **OK**.
6. Click **Save**.

Related Topics

Create Counter Policies Dialog Box

Adding Counter Ranges

To vary QoS based on the level of usage, add counter ranges to a counter policy and use different policy labels for each range.

To add a counter range to a counter policy:

1. In the Counting Ranges section, click the **Add** icon in the table toolbar.

   The Add Counter Range dialog box appears.

2. In the **Starting At** field, enter the starting value for the range, or select **No Minimum**.

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PDC automatically generates an end value for the range based on the existing counter ranges.

For example, if you specify 5, PDC creates the following range:

- 5 – No maximum

If you then create another quantity range with a start value of 2.5, PDC creates the following ranges:

- 2.5 – 5
- 5 – No maximum

3. Add counter ranges.
4. From the **Label** list, select the corresponding label for each counter range.

> **Tip**
>
> You can select the same label for multiple counter ranges as appropriate.

5. Click **OK**.

   A table for the counter range is added.

Modifying Policy Specifications

To modify a policy specification:

1. In the Policy Specifications section, click the policy specification that you want to modify.
2. Edit the name and description as required.
3. Modify the counter policies as required. See "Modifying Counter Policies" for more information.
4. Click **Save**.

Modifying Policy Labels

To modify a policy label:

1. In the Counter Policies section, click the counter policy that you want to modify.

   The Edit Counter Policy dialog box appears.
2. From the **Policy Label** list, select the policy label that you want to modify.

   The Edit Policy Label dialog box appears.
3. Modify the policy label and sub labels as required.

   To edit a sublabel, click a label in the Sub-labels section.

   To delete a sublabel, select a label in the Sub-labels section and then click the **Delete** icon in the table toolbar.
4. Click **OK**.

Related Topics

Create Policy Label Dialog Box

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Modifying Counter Policies

To modify a counter policy:

1. In the Counter Policies section, click the counter policy that you want to modify.

   The Edit Counter Policies dialog box appears.
2. Modify the policy label, counter ranges, and the range labels as required.

   For modifying policy labels, see "Modifying Policy Labels".

   For modifying counter ranges, see "Modifying Counter Ranges".
3. Click **OK**.

Related Topics

Create Counter Policies Dialog Box

Modifying Counter Ranges

To modify the counter range in a counter policy:

1. Go to the Counter Ranges section.
2. In the **Counter Ranges** table, click the link in the **Counter Ranges** column for which you want to change the range.

   The Edit Counter Range dialog box appears.
3. Modify the **Start** value.

   You can specify a minimum start value or select **No Minimum**.

   You cannot enter a value that includes the entire following counter range. Instead, to extend a range beyond the following range, first delete the following range. See "Deleting Counter Ranges" for more information.

   PDC adjusts the start and end values of the preceding and following counter ranges accordingly.
4. Click **OK**.

Deleting Policy Specifications

To delete a policy specification:

1. In the Policy Specifications section, click the policy specification that you want to delete.
2. Click the **Delete** icon in the table toolbar.

   A confirmation message appears.
3. Click **OK**.

   The policy specification and the associated counter policies are removed.
4. Click **Save**.

Deleting Counter Policies

To delete a counter policy:

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1. In the Counter Policies section, select the counter policy that you want to delete.
2. Click the **Delete** icon in the table toolbar.

   A confirmation message appears.
3. Click **OK**.

   The counter policy is removed from the table.
4. Click **Save**.

Deleting Counter Ranges

To delete a counter range:

1. Go to the Counter Ranges section.
2. In the **Counter Ranges** table, select the range in the **Counter Ranges** column.
3. Click the **Delete** icon in the table toolbar.

   A confirmation message appears.
4. Click **OK**.

   The counter range and the corresponding policy label are removed from the table.

   If you deleted a middle range, PDC automatically adjusts the end value of the previous counter range.

Policy Specifications Page Reference

Use the Policy Specifications page to create, modify, or delete policy specifications, counter policies, and policy labels.

For a description of the fields, see:

- Policy Specifications Section
- Create Policy Label Dialog Box
- Create Counter Policies Dialog Box

Field	Description
Add 	Use to add a policy specification, policy label, and counter policy.
Delete 	Use to remove a policy specification, policy label, and counter policy.

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Tip

You cannot delete a policy specification that is referenced by other components. The **In Use** icon indicates that the policy specification is referenced by other components and that it cannot be deleted:



Policy Specifications Section

Use the **Policy Specifications** section to add the policy specifications. Click the **Add** icon in the table toolbar to add a policy specification.

Column	Description
Name, **Description**	Enter the name and the description of the policy specification that you have added.

Related Topics

Specifying General Information for a Policy Specification

Create Policy Label Dialog Box

Use the **Create Policy Label** dialog box to create policy labels.

Field	Description
Name	Enter a unique name for the policy label.
Sub Labels	In the sub labels section, click **Add** icon to enter a unique name for the sub label.

Related Topics

Creating Policy Labels

Modifying Policy Labels

Create Counter Policies Dialog Box

Use the **Create Counter Policies** dialog box to counter policies.

Field	Description
Policy Label	Select a policy label from the drop-down list. You can also create and edit a policy label.
Units	Select the units to be used for measurement.
Balance Element	Select a balance element to which the counter policy must be applied.
Add Counter Range	Add counter ranges to a counter policy and use different policy labels for each range.

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Related Topics

Creating Counter Policies

Modifying Counter Policies

Deleting Counter Policies

Adding Counter Ranges

Modifying Counter Ranges

Deleting Counter Ranges

Configuring Item Type Selectors

An *item type selector* contains rules and item specifications for assigning balance impacts to bill items. These rules and specifications enable you to assign different bill items for balance impacts within the same event or event type. For example, you can define separate bill items for international and national calls and apply a different tax to each bill item at billing time.

See the discussion about item type selectors in *PDC User's Guide* for more information.

To configure item type selectors by using the PDC user interface:

1. In the Setup section of the navigation pane, under **Pricing Elements**, click **Item Type Selectors**.

   The Item Type Selectors page appears.
2. Specifying general information for an item type selector. See "Specifying General Information for an Item Type Selector".
3. Select the attributes that you want to use in the rules for the item type selector. See "Selecting Rule Attributes".
4. Create the rules for the item type selector. See "Creating Item Type Selector Rules".

Related Topics

Item Type Selectors Page Reference

Specifying General Information for an Item Type Selector

> **Note**
>
> You can add only one item type selector for a combination of service, event, and item group.

To specify general information for an item type selector:

1. In the Item Type Selector section, click the **Add** icon in the table toolbar.

   A new row is added.
2. In the **Name** column, enter a unique name for the item type selector.
3. In the **Description** column, enter a description for the item type selector.

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4. In the **Applicable To** column, select the service name or account.
5. To apply the item type selector to all the child services of the selected service or account, select the check box in the **Select Applicable to all Child Services** column.
6. In the **Event** column, select the name of an event.
7. To apply the item type selector to all the child events of the selected event, select the check box in the **Select Applicable to all Child Events** column.
8. In the **Item Group** column, enter the name of the item group to be used for aggregating the balance impacts.
9. To apply the item type selector to all the balance impacts, select the check box in the **Applicable to all Balance Impacts** column.
10. In the **Default Item Spec** column, select a default item specification from the list or create a default item specification.

    To create the default item specification, see "Creating Item Specifications".
11. Click **Save**.

Related Topics

Item Type Selectors Section

Modifying Item Type Selectors

Deleting Item Type Selectors

Selecting Rule Attributes

To select the rule attributes:

1. In the **Rules** section, click **Manage Rule Attributes**.

   The Manage Rule Attributes dialog box appears.
2. Choose the attribute for assigning balance impacts and click the check box in the **Use** column.
3. Select an operator to be used in the rule for the selected attributes from the **Operator** list.
4. Click **OK**.

   The selected attributes are displayed in the Rules section.

Related Topics

Manage Rule Attributes Dialog Box

Creating Item Type Selector Rules

Creating Item Type Selector Rules

To create rules for an item type selector:

1. In the **Item Type Selectors** section, select an item type selector.
2. Click the **Add** icon in the table toolbar of the Rules section.

   A new row is added. By default, in the **Priority** column, the priority of the rules is displayed in the order of creation.
3. In the **Rule Name** column, enter a name for the rule.

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4. In the attribute columns, enter values for each of the rule attributes that you selected in the Manage Rule Attributes dialog box.
5. In the **Item Spec** column, select an item specification from the list or create an item specification.

   To create an item specification, see "Creating Item Specifications".
6. Click **Save**.

Related Topics

Item Type Selectors Section

Changing Priority of the Rules

To change the priority of the rules, in the Rules section select a rule and then click the up and down arrow keys in the table toolbar.

> **Note**
>
> - In the Rules section, you cannot sort the columns in the ascending or descending order because the columns are dynamically generated. You can only change the priority of the rules.
> - After creating the rules, changing the event or service in the item type selector removes all the rules configured for that event or service.

Related Topics

Rules Section

Creating Item Specifications

To create an item specification:

1. In the item specifications column, navigate till the end of the list of values and then click **Manage Item Spec**.

   The Item Specifications dialog box appears.
2. Click the **Add** icon in the table toolbar.

   A new row is added.
3. In the **Name** column, enter a unique name for the item specification.
4. In the **Category** column, enter a charge category for the item specification.
5. In the **Type** column, enter an item type for assigning balance impacts.

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> **Note**
>
> - Item type should always start with */item/*.
> - You can add only one item specification for a combination of category, item type, and aggregation type.

6. In the **Aggregation Type** column, select an aggregation type to track the balance impacts.
7. Click **OK**.

Related Topics

Item Specifications Dialog Box

Modifying Item Type Selectors

To modify an item type selector:

1. In the Item Type Selectors section, click the item type selector that you want to modify.
2. Do the following as appropriate:
   - To modify an item specification, in the item specifications column navigate till the end of the list of values, and then click **Manage Item Spec**. In the Item Specifications dialog box, click the item specification that you want to modify.
   - To modify a rule, in the Rules section click the rule that you want to modify.
3. Make the necessary changes as required.
4. Click **Save**.

Related Topics

Item Type Selectors Section

Deleting Item Type Selectors

To delete an item type selector:

1. In the Item Type Selectors section, click the item type selector that you want to delete.
2. Do the following as appropriate:
   - To delete an item specification, in the item specifications column navigate till the end of the list of values, and then click **Manage Item Spec**. In the Item Specifications dialog box, click the item specification that you want to delete.

     > **Note**
     >
     > You cannot delete an item specification that is in use.

   - To delete a rule, in the Rules section, click the rule that you want to delete.
3. Click the **Delete** icon in the table toolbar.

   A confirmation message appears.

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4. Click **OK**.

   The selected item is removed.

5. Click **Save**.

Item Type Selectors Page Reference

Use the Item Type Selectors page to create, modify, or delete item type selectors, item specifications, and their rules.

For a description of the fields, see:

- Item Type Selectors Section
- Rules Section
- Item Specifications Dialog Box
- Manage Rule Attributes Dialog Box

Field	Description
Add 	Use to add an item type selector, item specification, and a rule.
Delete 	Use to remove an item type selector, item specification, and a rule.

Item Type Selectors Section

Use the Item Type Selectors section to add the item type selectors.

Column	Description
Name, **Description**	Enter a unique name and a description for the item type selector.
Applicable To	Select the service name or account.
Applicable to all Child Services	(Optional) Select the check box to apply the item type selector to all the child services of the selected service or account.
Event	Select the name of an event.
Applicable to all Child Events	(Optional) Select the check box to apply the item type selector to all the child events of the selected event.
Item Group	Enter the name of the item group to be used for aggregating the balance impacts.
Applicable to all Balance Impacts	(Optional) Select the check box to apply the item type selector to all the balance impacts.
Default Item Spec	Select a default item specification.

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Related Topics

Specifying General Information for an Item Type Selector

Modifying Item Type Selectors

Deleting Item Type Selectors

Item Specifications Dialog Box

Use the **Item Specifications** dialog box to create item specifications.

Field	Description
Name	Enter a unique name for the item specification.
Category	Enter a charge category. This category determines the balance impacts to be tracked. See "About Charge Categories" for descriptions of the categories.
Type	Enter the type of the bill item for assigning balance impacts. This must match the item type created in BRM. **Note:** Item type should always start with */item/*. You can add only one item specification for a combination of category, type, and aggregation type.
Aggregation Type	Select the aggregation type for tracking balance impacts: • **CUMULATIVE_NONPRECREATE.** Specifies that the bill item accumulates charges throughout the billing cycle and the bill item need not be pre-created in BRM. • **INDIVIDUAL_NONPRECREATE.** Specifies that the bill item stores a charge for a single event and the bill item need not be pre-created in BRM. • **CUMULATIVE_PRECREATE.** Specifies that the bill item accumulates charges throughout the billing cycle and the bill item needs to be pre-created in BRM.

Related Topics

Creating Item Specifications

Manage Rule Attributes Dialog Box

Use the Manage Rule Attributes dialog box to select the attributes that you want to use in the item type selector rules.

Field	Description
Use	Select this check box against the attributes that you want to use in the rules.
Attribute Name	Displays the attributes that you can use in the rules.

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Field	Description
Operator	Select an operator and enter a value. Displays the relationship between the rule's default field value and the value in the subscriber, event, service, or charging field. You can select one of the following operators: • Equal To • Not Equal To • Greater Than • Greater Than or Equal To • Less Than • Less Than or Equal To • Contains • Matches

Related Topics

Selecting Rule Attributes

Rules Section

Use the Rules section to add the item type selector rules.

Column	Description
Priority	Displays the priority of the rules. By default, the priority of the rules is displayed in the order of creation.
Rule Name	Enter a name for the rule.
Field Name	Enter values for each of the rule attributes that you selected. The same fields are used for all the rules in the item type selector. You can set specific values in the rule to limit the fields that you want used in a rule.
Item Spec	Select or add an item specification.

Related Topics

Creating Item Type Selector Rules

Selecting Rule Attributes

Changing Priority of the Rules

Creating Special Day Calendars

Use a special day calendar to define a set of dates, such as holidays, for which you want to configure special prices for your services. Each date can either be a specific date valid only in one year or a recurring date valid each year. These dates are used in a time model to define a time period. A time period can be used in a charge offer to determine a price.

To create special day calendars:

1. In the Setup section of the navigation pane, under **Pricing Elements**, click **Special Day Calendars**.

   The **Special Day Calendars** page appears.

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2. In the Special Day Calendars section, click the **Add** icon in the table toolbar.

   An editable row is added.
3. In the **Special Day Calendars** column, enter a name.
4. In the Special Day Definitions for Selected Calendar section, click the **Add** icon in the table toolbar.

   An editable row is added.
5. In the **Type** column, select one of the following types of special days:
   - **Fixed** to specify a specific date valid in only one year.
   - **Recurring** to specify a date that is valid every year.
6. In the **Special Days** column, enter the date.
7. In the **Description** column, enter a brief description for the special day.
8. Enter additional special day definitions for the calendar as needed.
9. Click **Submit**.

   The special day definitions for the selected calendar are added to the table.

Related Topics

Special Day Calendars Page Reference

Special Day Calendars Page Reference

Use the **Special Day Calendars** page to create, edit, or delete a set of dates, such as holidays, for which you want to configure special prices for your services. These dates are used in a time model to define a time period. A time period can be used in a charge offer to determine a price.

For a description of the fields, see:

- Special Day Calendars Section
- Special Day Definitions for Selected Calendar Section

Special Day Calendars Section

Use the Special Day Calendars section to define names for the calendars.

Click the **Add** icon in the table toolbar to add a special day calendar.

Column	Description
Special Day Calendars	Enter a name for the special day calendar.

Related Tasks

Creating Special Day Calendars

Special Day Definitions for Selected Calendar Section

Use the Special Day Definitions for Selected Calendar section to specify the dates to include in the calendar.

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Click the **Add** icon in the table toolbar to add special days to the calendar.

Column	Description
Type	Select the special day type: • **Fixed** to specify a specific date valid only in one year, such as May 8, 2011, for Mother's Day in the U.S. • **Recurring** to specify a date that is valid every year, such as January 1 for New Year's Day.
Special Days	Click the date selector to select a date for the special day type in the following formats: • For **Fixed** type: *Mmm DD YYYY*. For example, **May 08 2011**. • For **Recurring** type: *Mmm DD*. For example, **Jan 01**.
Description	Enter a brief description.

Related Tasks

Creating Special Day Calendars

Creating Custom Analyzer Rules

A custom analyzer rule (custom rule) is a named expression that is used in selector rules to guide to a price. You can use these rules when configuring a charge based on a subscriber's **Friends & Family**, **Special Day**, or **Closed User Group** profile. For example, you can create custom rules for calls to friends and family on a subscriber's birthday, or to configure supplementary services, such as call forwarding and call blocking.

To create custom analyzer rules:

1. In the Setup section of the navigation pane, under **Pricing Elements**, click **Custom Analyzer Rules**.

   The **Custom Analyzer Rules** page appears.
2. In the Custom Analyzer Rules section, click the **Add** icon in the table toolbar.

   A new row is added.
3. In the Name column, enter the rule name.
4. (Optional) Enter the rule description.
5. In the Details section, select the following for which you want to create the rule:
   - **Profile Attribute Specification**. Select the profile attribute specifications that you want to use for configuring the rule.
   - **Service Specification**. Select the service attributes that you want to use for configuring the rule.
   - **Event Specification**. Select the event attributes that you want to use for configuring the rule.
6. Under **Condition**, click the condition link.

   The **Condition Builder** dialog box appears.
7. In the Condition Builder dialog box, enter the conditions for the custom rule.

   For example, you can define the conditions for identifying if the originating and terminating subscribers belong to a common closed user group to apply special rates for the calls between the members of the closed user group.

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8. Click **OK**.
9. Click **Save**.

Related Topic

Custom Analyzer Rules Page Reference

Custom Analyzer Rules Page Reference

Use the Custom Analyzer Rules page to create custom rules.

> **Note**
>
> You cannot delete a custom rule that is being referenced by other pricing components. The **In Use** icon indicates that the custom rule is referenced by other rules and that it cannot be deleted:
>
> 

See "Details Section" for configuring custom rules.

Field	Description
Name, Description	Enter a unique name and a description for the custom rule.

> **Note**
>
> You can copy the existing rules. When you click the **Duplicate** icon, a copy of the selected rule is added below the selected rule.
>
> 
>
> The rule's fields contain the same values as the fields in the original rule.

Related Topic

Details Section

Details Section

Use the Details section to configure custom rules.

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Field	Description
Rating Profile	Select the profile attribute specifications that you want to use for configuring the rule. **Note**: If you do not select any profile attribute specification value, **Not Used** is selected by default.
Service	Select the service attributes that you want to use for configuring the rule. **Note**: If you do not select any service specification value, **Not Used** is selected by default.
Event	Select the event attributes that you want to use for configuring the rule. **Note**: If you do not select any event specification value, **Any** is selected by default.
Condition	Click to enter the expression and then select conditions for the custom rule. See "Condition Builder Dialog Box" for more information.

Related Topic

Condition Builder Dialog Box

Condition Builder Dialog Box

Use the Condition Builder dialog box to configure conditions by using condition elements.

Field	Description
Condition Type/Left Hand Side Condition Type Create Right Hand Side of Condition Type	Select one of the following condition types for the condition type, left hand side condition type, and the right hand side condition type (as applicable): • **Complex Expression**. By default, this condition type is disabled. You can use any condition type to create a complex expression. • **Compare Field with Another Field**. Compares the field with another field in the condition. • **Compare Field with Values**. Compares the field with a specific value. • **Dynamic Fields**. Compares dynamic fields. Use this condition type to configure closed user groups. **Note**: You can interchange the left hand side and right hand side conditions by clicking the **Swap** icon: 
Originating	Select the originating values for configuring the closed user groups. • **Selector Field**. Select the closed user group name that matches the given product identifier (PUID); for example, a phone number for the originating subscribers. • **Operator**. Displays the **EQUAL_TO** operator. • **Condition Field**. Select any service, event, or account attribute.
Operator (for **Dynamic Fields**)	Displays the **INTERSECT** operator.

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Field	Description
Terminating	Select the terminating values for configuring the closed user groups. • **Selector Field**. Select the closed user group name that matches the given product identifier (PUID); for example, a phone number for the terminating subscribers. • **Operator**. Displays the **EQUAL_TO** value. • **Condition Field**. Select any service, event, or account attribute.
Compare Field	Select a field that you want to compare. **Note**: The list of fields appears based on the configuration.
Operator (for **Condition Type**)	Select an operator to compare the fields, fields and values, or the left hand side and right hand side conditions.
Compare to Field	Select a field that you want to compare with. **Note**: The list of fields appears based on the configuration.
Values	Enter the values for which you want to compare with the field.

Creating Tax Codes

Tax codes are used to assign taxes to the products and services that you sell to your customers. For example, you use tax codes to apply taxes differently to usage charges versus charges for physical goods. A tax code indicates which tax to apply based on a charge offer. For example, a telephone handset uses a different tax code than an online service subscription. When a customer is charged, the tax code identifies the tax to apply.

To create a tax code, see:

- Creating Tax Codes for a Flat Tax or Custom Implementation
- Creating Tax Codes for Vertex

Creating Tax Codes for a Flat Tax or Custom Implementation

You use Tax Codes page to implement simple flat taxes. You configure tax code and then assign it to one or more tax rates, which are differentiated by criteria such as validity date and jurisdiction.

To create a tax code for a flat tax or custom implementation:

1. In the **Setup** section of the navigation pane, under **Pricing Elements**, click **Tax Codes**.

   The Tax Codes page appears.
2. In the **Tax Codes** section, click the **Add** icon in the table toolbar.

   A new row is added.
3. In the **Tax Name** column, enter the tax name.
4. (Optional) Enter the tax description.
5. In the **GLID** column, enter the general ledger ID to associate with the tax code.
6. In the **Tax Code** column, enter a unique tax code.
7. In the **Type** column, select the tax package type that you want to use. For flat taxes and custom implementations, select **CUSTOM**.
8. In the **Details** section, configure the following:

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- In the **Description** column, enter the tax rate description.
- In the **Rate (%)** column, enter the tax rate in percent.
- In the **Jurisdiction** column, select the Jurisdiction level for which this rate is applicable.
- In the **Nexus** column, click the link to configure nexus for the corresponding jurisdiction level.
- In the **Tax Calculation Rule** column, select the tax rule type that determines how taxes will be calculated. For more information about tax calculation rule, see "Details Section (For Flat Taxes and Custom Implementations)".
- Select **Manage...** from the drop-down list to configure the validity period.

  The Manage Validity Period dialog box appears. You can add, edit, and delete the validity period from the Manage Validity Period dialog box. By default, validity period is set to **Immediately - Never Ends**.

9. Click **Save**.

Creating Tax Codes for Vertex

You specify to calculate taxes using Vertex by selecting a Vertex tax package type on the tax code. Tax rates are determined in Vertex.

To create a tax code for Vertex:

1. In the **Setup** section of the navigation pane, under **Pricing Elements**, click **Tax Codes**.

   The **Tax Codes** page appears.
2. In the **Tax Codes** section, click the **Add** icon in the table toolbar.

   A new row is added.
3. In the **Tax Name** column, enter the tax name.
4. (Optional) Enter the tax description.
5. In the **GLID** column, enter the general ledger ID to associate with the tax code.
6. In the **Tax Code** column, enter a unique tax code.
7. In the **Type** column, select the tax package type that you want to use: **CUSTOM**, **VERTEX_QUANTUM**, **VERTEX_COMMTAX_21**, or **VERTEX_O_SERIES**.
8. In the **Details** section, configure the appropriate fields for the selected tax type. For details, see:
   - Details Section (For Flat Taxes and Custom Implementations)
   - Details Section (For Vertex)
9. Click **Save**.

Tax Codes Page Reference

Use the Tax Code page to create, modify, and delete tax codes.

For a description of the fields, see:

- Tax Codes Section
- Details Section (For Flat Taxes and Custom Implementations)

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- Details Section (For Vertex)
- Manage Validity Period Dialog Box

Tax Codes Section

Use the Tax Codes section to add tax codes.

Column	Description
Tax Name, Description	Name and a brief description of the tax code.
GLID	The general ledger ID associated to the tax code.
Tax Code	A unique alphanumeric value that defines categories with different tax treatments.
Type	The tax package type. Values are: • **CUSTOM**: For flat taxes and custom implementations. • **VERTEX_O_SERIES**: For Vertex O Series. • **VERTEX_QUANTUM**: For Vertex Communications Tax Q Series (telecommunications). • **VERTEX_COMMTAX_21**: For Vertex Sales Tax Q Series (sales and use).

Details Section (For Flat Taxes and Custom Implementations)

Use the Details section to configure tax rates for flat taxes and custom implementations.

Column	Description
Description	Description of tax rate.
Rate (%)	The tax rate in percent. For example, 4.25 means 4.25%. For prepaid purchase events that grant negative currency balances, the corresponding tax associated with it should also be negative. For example, -4.25.
Jurisdiction	Jurisdiction level for which this rate is applicable. Values are **FEDERAL**, **STATE**, **COUNTY**, **CITY**, **LOCATION**.
Nexus	The jurisdiction where the rate applies. If the **Jurisdiction** field value is **STATE**, the Nexus values must be state-level jurisdictions.

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Column	Description
Tax Calculation Rule	Determines how taxes will be computed. Values are: • **STANDARD**: Standard tax computation. Taxes are computed based on the taxable amount and are then added to the total. • **TAX**: "Tax on tax" computation. Taxes are computed based on previous taxable amounts and taxes, and are then added to the total. For example, if tax1 = 10%, tax2 = 20%, and charge = 100.00, taxes are computed as follows: – tax1 = 10% @ 100.00 = 10.00 – tax2 = 20% @ (100.00 + 10.00) = 22.00 • **INCLUSIVE**: Inclusive tax computation. Taxes are already included in the total. For example, if the total is $110 and the tax is 10%, the tax amount is $10 and the charge is $100. • **NCS**: Noncumulative standard tax computation. Taxes are computed based on the taxable amount but are not added to the total. • **NCT**: Noncumulative "tax on tax" computation. Taxes are computed based on the taxable amount but are not added to the total. For example, if tax1 = 10%, tax2 = 20%, and charge = 100.00, taxes are computed as follows: – tax1 = 10% @ 100.00 = 10.00 – tax2 = 20% @ 100.00 = 20.00

Details Section (For Vertex)

Use the Details section to map tax codes for Vertex.

Column	Description
Category Code	(Applicable for **VERTEX_QUANTUM** tax package type.) Refer to the Communications Tax Q Series documentation for more information about its category codes.
Service Code	(Applicable for **VERTEX_QUANTUM** tax package type.) Refer to the Communications Tax Q Series documentation for more information on service codes.
Transaction Type	(Applicable for **VERTEX_COMMTAX_21** tax package type.) Refer to the Sales Tax Q Series documentation for more information on transaction types.
Transaction Subtype	(Applicable for **VERTEX_COMMTAX_21** tax package type.) Refer to the Sales Tax Q Series documentation for more information on transaction subtypes.

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Column	Description
Sale Type	Indicates if the charge offer is for sale (**SALE**) or resale (**RESALE**). The default value is **SALE**.

Manage Validity Period Dialog Box

Use the Manage Validity Period dialog box to add, modify, and delete the validity period for the tax rate. You can use multiple validity periods to create different rates for a single tax code, but the validity periods must not overlap.

Click the **Add** icon in the table toolbar to add a new validity period.

Field	Description
Start	Start date for the tax rate validity period. By default, start date is set to **Immediately**. To set a specific start date, deselect **Immediately**, then enter a date or use the date selector to select a date.
End	End date for the tax rate validity period. By default, end date is set to **Never Ends**. To set a specific end date, deselect **Never Ends**, then enter a date or use the date selector to select a date.

Creating Tax Exemption Codes

You use tax exemption codes to remove tax liability (either entirely or partially) from a charge. For example, you could create a tax exemption code to exempt a customer account from all tax liability.

To create a tax exemption code:

1. In the **Setup** section of the navigation pane, under **Pricing Elements**, click **Tax Exemption Codes**.

   The Tax Exemption Codes page appears.
2. In the **Tax Exemption Codes** section, click the **Add** icon in the table toolbar.

   A new row is added.
3. In the **Name** column, enter the tax exemption name.
4. (Optional) Enter the tax exemption description.
5. In the **Tax Exemption Code** column, enter a unique tax exemption code.
6. In the **Jurisdictions** column, select one or more jurisdiction levels for which this rate is applicable.
7. In the **Jurisdictions and Rates** section, do the following for each jurisdiction:
   - In the **Rate (%)** column, enter a rate between 0 and 1 that represents a percentage. For example, enter 0.25 for a 25% exemption.
   - In the **Validity** column, select the **Immediately - Never Ends** link and then enter the new start and end dates for the validity period.

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8. Click **Save**.

Related Topics

Tax Exemption Codes Page Reference

Tax Exemption Codes Page Reference

Use the Tax Exemption Code page to create, modify, and delete tax exemption codes.

For a description of the fields, see:

- Tax Exemption Codes Section
- Jurisdictions and Rates Section
- Manage Validity Period Dialog Box

Tax Exemption Codes Section

Use the Tax Exemption Codes section to define your tax exemption codes.

Click the **Add** icon in the table toolbar to add a tax exemption code.

Column	Description
Name	Enter a unique name for the tax exemption code.
Description	(Optional) Enter a brief description for the tax exemption code.
Tax Exemption Code	Enter a unique alphanumeric value that defines categories with different tax exemptions.
Jurisdictions	Enter the jurisdiction level for which this exemption is applicable: **All**, **City**, **County**, **District**, **Federal**, **Location**, **State**, and **Territory**.

Jurisdictions and Rates Section

Use the Jurisdictions and Rates section to configure the exemption rate for each jurisdiction level.

Column	Description
Jurisdiction	Displays the jurisdiction levels you selected.
Rate (%)	Enter the tax exemption rate. Enter a value between 0 and 1. For example, enter .15 for 15%.
Validity	Displays the validity period for the tax exemption code. By default, it displays **Immediately – Never Ends**. To modify the validity period, click the link for the validity period. See "Manage Validity Period Dialog Box".

Manage Validity Period Dialog Box

Use the Manage Validity Period dialog box to set the validity period for the jurisdiction's tax exemption rate.

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Field	Description
Start	Displays the start date for the validity period. By default, the start date is set to **Immediately**. To set a specific start date, deselect **Immediately** and then enter or select a date.
End	Displays the end date for the validity period. By default, the end date is set to **Never Ends**. To set a specific end date, deselect **Never End** and then enter or select a date.

Configuring Price Tags

Price tags let you apply special prices to charge offers or discounts according to your specified rules. You configure price tag setup components to specify the balance elements, resources, and services a price tag applies to and set the list of possible values.

To configure price tags:

1. In the Setup section of the navigation pane, under **Pricing Elements**, click **Price Tags**. The **Price Tags** page appears.
2. Create, modify, or delete price tag setup components and the price tags within them. See:
   - Creating Price Tags
   - Modifying Price Tags
   - Deleting Price Tags

Related Topics

Price Tags Page Reference

Creating Price Tags

To create price tags:

1. In **Price Tags** table, click the **Add** icon.
   A new row appears.
2. In the **Price Tag Name** column, enter a unique name for the price tag setup component.
3. Optionally, in the **Description** column, enter a description.
4. In the new row in the **Price Tag details** table, configure tags. See "Price Tag Details Table."
5. Click **Save**.

You can add more rows in the **Price Tags** table to create more setup components with their own sets of price tags. For each row in the **Price Tags** table, you can add more rows in the **Price Tag details** table to define more price tags within the same setup component.

Within the same setup component, you cannot create duplicate price tags. This means:

- You cannot create multiple **Price Tag details** rows that specify all of the same values for Resource Id, Resource Unit Type, and Permitted. For example, Tag1 and Tag 2 could not both specify Resource Id: 840, Resource Unit Type: BYTE and Permitted: IP.

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- You cannot create multiple **Price Tag details** rows that specify a subset of the same values for Resource Id, Resource Unit Type, and Permitted. For example, because using Resource Id: 0 means the tag applies to any balance element, if one row specifies Resource Id: 0, Resource Unit Type: BYTE and Permitted: IP, another row could not specify Resource Id: 840, Resource Unit Type: BYTE and Permitted: IP.

If needed, you can create duplicate tags in separate setup components. For example, you could create:

- A row in the **Price Tags** table for **TagGroup1** that includes a row in the **Price Tag details** table specifying Resource Id: 0, Resource Unit Type: BYTE and Permitted: IP
- A second row in the **Price Tags** table for **TagGroup2** that includes a row in the **Price Tag details** table specifying the same values for Resource ID, Resource Unit Type, and Permitted.

Related Topics

Price Tags Page Reference

Modifying Price Tags

Modifying Price Tags

To modify price tags:

1. In the **Price Tags** table, click the price tag you want to modify.
2. Modify fields as required:
   - For price tags that are not referenced by other pricing components, you can modify all fields.
   - For price tags that are referenced by other pricing components, you can modify the following fields:
     - Description
     - Rule Type
     - Values

> **Note**
>
> Be sure that you understand the impact that modifying the rules and values will have on the pricing components that reference the price tag.

3. Click **Save**.

Related Topics

Price Tags Page Reference

Deleting Price Tags

You can delete a price tag only if it is not referenced by any other pricing components.

To delete a price tag:

1. In the **Price Tags** table, click the row for the price tag you want to delete.

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2. Do one of the following:
   - To delete the entire setup component, click the **Delete** icon in the **Price Tags** table toolbar.
   - To delete a tag within the setup component, in the **Price Tag details** table, click the row for the tag you want to delete, and then click the **Delete** icon in the **Price Tag details** table toolbar.

   A confirmation message appears.
3. Click **OK**.
   The selected tag or setup component is removed.
4. Click **Save**.

Related Topics

Price Tags Page Reference

Deleting Pricing Components

Obsoleting Pricing Components

Price Tags Page Reference

Use the **Price Tags** page to create, modify, and delete price tags.

For a description of the fields, see:

- Price Tags Table
- Price Tag Details Table

Price Tags Table

Use the Price Tags table to configure price tag setup components. Each row in the table represents a price tag setup component, which can contain multiple price tags.

Use the **Add** and **Delete** icons in the table toolbar to add or delete a price tag setup component.

> **Note**
>
> You cannot delete a price tag that is being referenced by other pricing components. The **In Use** icon indicates that the price tag is referenced by other components and that it cannot be deleted:
>
> 

See "Price Tag Details Table" for more information about the price tags details table.

Column	Description
Price Tag Name	Displays the name of the price tag setup component.

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Column	Description
Description	Displays the description of the price tag setup component.

Related Topics

Price Tag Details Table

Related Tasks

Modifying Price Tags

Creating Price Tags

Deleting Price Tags

Price Tag Details Table

Use the Price Tag details table to configure price tags. Each row in the table represents a price tag with the price tag setup component selected in the Price Tags table.

Column	Description
Resource Id	The balance element associated with the price tag. The default value of **0** lets you use the price tag with any balance element.
Resource Unit Type	The unit for the balance element. The default of **ANY** lets you use the price tag with any unit.
Permitted	The services to associate the price tag with. You can select multiple services and their children. The default of **ANY** lets you use the price tag with any service. See "Permitted Services Dialog Box" for more information.
Rule Type	The type of values that can be configured. The default of **ANY** lets you use any values at purchase time.
Values	The possible values that can be used. Values can be positive or negative integers or decimals. • If Rule is set to **ANY**, the default value is an empty string and any values can be entered at purchase time. • If Rule is set to **LIST**, enter a list of semicolon-separated values. For example, **5;10;20**. • If Rule is set to **RANGE**, enter values for the bottom and top of the range, separated by a semicolon. For example, **5;20**.

Related Topics

Price Tags Table

Permitted Services Dialog Box

Related Tasks

Modifying Price Tags

Creating Price Tags

Deleting Price Tags

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Permitted Services Dialog Box

Use the **Permitted Services** dialog box to select the services that a price tag can be used with.

Field	Description
Permitted	Select a service name from the drop-down list. The default of **ANY** lets you use the price tag with any service.
Child Services	(Optional) Select the check box to allow the price tag to be used with all child services of the selected service.

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3
Changesets

A changeset is a group of setup and pricing components that you manage and submit together. Changesets are managed and displayed in the Oracle Communications Pricing Design Center (PDC) **Workspace** page. See "Understanding the Workspace Page".

For information on using changesets, see:

- Creating a Changeset
- Specifying the Active Changeset
- Validating a Changeset
- Submitting a Changeset
- Exporting and Importing Changesets
- Modifying a Changeset
- Deleting a Changeset
- Workspace Page Reference
- Create Changeset Dialog Box
- Edit Changeset Dialog Box
- Export Dialog Box
- Import Dialog Box
- Hide and Close Failed Changesets Dialog Box

For an overview of changesets, see "About Changesets" in *PDC Creating Product Offerings*.

Creating a Changeset

To create a changeset:

1. In the **Workspace** page, click the **Add** icon in the Workspace task pane.

   The Create Changeset dialog box appears.
2. Enter a name and a description.
3. (Optional) To make the changeset active upon creation, select **Set as Active Changeset**.
4. Click **OK**.

   The changeset is added to the **Open Changesets** list. A check mark appears next to changeset if it is set to active.

Related Topics

Validating a Changeset

Submitting a Changeset

Exporting and Importing Changesets

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Specifying the Active Changeset

When you create or modify a setup or pricing component, a draft of the new or updated component is automatically added to your active changeset.

You can have multiple changesets, but only one can be active at any time.

> **Note**
>
> Do not switch the active changeset while in the middle of creating a setup or pricing component. Otherwise, a search for referenced components may return components from different changesets, which is invalid. This does not apply when editing draft components.

To specify the active changeset:

1. In the Workspace task pane, select a changeset.
2. Do one of the following:
   - From the **Actions** menu, select **Set As Active**.
   - Right-click the changeset and select **Set As Active**.

   The changeset becomes active, and a check mark appears next to its name.

Related Topics

Creating a Changeset

Validating a Changeset

Before a changeset can be submitted by PDC, it must be validated. When you submit a changeset, PDC validates all the components in the changeset. See "Submitting a Changeset".

Optionally, you can validate a changeset by clicking the **Validate** button. You can also validate individual components. See "Validating Pricing Components".

To validate a changeset:

1. In the Workspace task pane, select a changeset.

   The setup and pricing components in the changeset appear in the Changeset Details section.
2. Click **Validate**.

   If no validation errors are found, the message "Validation Successful: No Errors Found" appears below the **Validate** button.

   If validation errors are found, the Validation Errors section appears at the bottom of the page that lists the validation errors. The number of validation errors displayed is limited to 25. To see additional errors, fix some of the existing errors.

   The **Status** column displays:

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Status Icon	Description
	Displays for invalid setup or pricing components in the changeset.
	Displays for setup or pricing components with invalid child nodes.

The invalid changeset node in the Workspace displays the following icon:



Submitting a Changeset

To publish the components in a changeset to Oracle Communications Billing and Revenue Management (BRM), you submit the changeset. You must submit an entire changeset; you cannot submit only some of its components. You cannot modify a changeset after it is submitted.

To submit a changeset:

1. In the Workspace task pane, select a changeset.

   The setup and pricing components in the changeset appear in the Changeset Details section.

2. Click **Submit**.

3. In the confirmation message, click **OK**.

   The components in the changeset are submitted for publication to BRM. The **Pending** and **Successfully Submitted** links are displayed in the Workspace task pane. To view the list of pending or successfully submitted changesets, move the mouse over the **Pending** or **Successfully Submitted** link.

   The status of its components is changed from Draft to Promoted when the components are validated and submitted for transformation to BRM.

   If one or more components cannot be submitted to BRM, the changeset is moved to the **Failed Changesets** list.

   After a changeset is successfully submitted, it is removed from your workspace. You can no longer access it from your workspace; however, it is still available in the database.

   To remove the list of successfully submitted changesets from the Successfully Submitted Changesets dialog box, click the **Successfully Submitted** link in the Workspace task pane and then click **Clear**.

> **Note**
>
> You cannot delete a pending changeset. If the changeset fails, you can fix and resubmit it.

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Related Topics

Fixing a Failed Changeset

Showing or Hiding Failed Changesets

You can show, hide, or close failed changesets.

> **Note**
>
> Only the users with Pricing Design Admin and Pricing Analyst roles can show or hide failed changesets. For more information on adding PDC users to groups, see *PDC Installation and System Administration Guide*.

To show or hide failed changesets:

> **Note**
>
> By default, all the failed changesets are displayed.

1. In the **Workspace** task pane, from the **Actions** menu, select one of the following:
   - **Hide Failed Changesets**

     All the failed changesets are hidden.
   - **Hide and Close Failed Changesets**

     The **Hide and Close Failed Changesets** dialog box appears. In the dialog box, select **Close Hidden Changesets** and then click **OK** to close all the failed changesets including the hidden failed changesets. Do not select this option, if you want to close only the changesets displayed in the **Failed Changesets** list.

     > **Note**
     >
     > If you close a failed changeset, you cannot reopen it.
     >
     > If you want to fix and resubmit the components in the closed changeset later, you can search and add those components to a new changeset.
   - **Show Failed Changesets**

     The hidden failed changesets are displayed. You can now fix and resubmit these changesets. See the following for more information:
     - Fixing a Failed Changeset
     - Submitting a Changeset

Related Topics

Hide and Close Failed Changesets Dialog Box

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Fixing a Failed Changeset

To submit a failed changeset, you must first fix it.

For information on the common changeset errors and how to resolve them, see the discussion about troubleshooting PDC in *BRM System Administrator's Guide*.

To fix a failed changeset:

1. In the Changeset Details section of a failed changeset, click **Fix**.

   Depending on the type of error, PDC either resubmits the changeset or creates a changeset with invalid objects.

   If PDC creates a changeset:

   - The Draft Created message is displayed. Click **OK**.
   - The original failed changeset is closed and removed from the **Failed Changesets** list.
   - Newly created changeset is added to the **Open Changesets** list.
   - The Changeset Details section of the newly created changeset lists the errors that caused the failure at the bottom of the section. An error tab is displayed for each transformation engine to which the changeset was submitted. This section also displays the Submission History link. Click the link to open the Submission History dialog box that displays all the predecessor changesets in a hierarchical structure. Select a changeset to view its details.

   If PDC resubmits a failed changeset to fix it, the changeset is removed from the **Failed Changesets** list and added to the **Pending Changeset** list.

Related Topics

Submitting a Changeset

Exporting and Importing Changesets

You can export a changeset from PDC to an XML file and also import a changeset from an XML file into PDC.

For exporting and importing changesets, see:

- Exporting Changesets
- Importing Pricing and Setup Components into Changesets

Exporting Changesets

> **Note**
>
> You can export only valid changesets.

You can export the components of a changeset into an XML file. Optionally, you can include all the components referenced by the components in the exported changeset, whether or not the components are part of that changeset.

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To export a changeset:

1. In the Workspace task pane, select a changeset.

   The setup and pricing components in the changeset appear in the Changeset Details section.

2. Do one of the following:

   - From the **Actions** menu, select **Export**.
   - Right-click the changeset and select **Export**.

   The Export dialog box appears.

3. Select the export option.

   You can select to export the setup or pricing components in this changeset and all the referenced setup or pricing components from other changesets or only the setup or pricing components in this changeset.

4. Click **OK**.

   The Opening *Filename* dialog box appears, where *Filename* is the default name of the XML file.

   > **Note**
   >
   > By default, PDC generates the XML file name as *ChangesetName***.xml**, where *ChangesetName* is the name of the changeset.

5. Select the **Save File** option.
6. Click **OK**.

   A dialog box in which to enter the name and location of the file appears.

7. Select a location where you want to save the file. Optionally, rename the file.
8. Click **Save**.

Importing Pricing and Setup Components into Changesets

You can import setup and pricing components from an XML file into a new or an existing open changeset. The imported components can be immediately submitted for publication.

To import a changeset:

1. In the Workspace task pane, from the **Actions** menu, select **Import**.

   The Import dialog box appears.

2. Click **Browse**.

   The Choose File to Upload dialog box appears.

3. Do the following:

   a. Select the XML file that you want to import.

   b. Click **Open**.

   The selected XML file name appears and the **Browse** button is replaced by the **Update** button.

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Optionally, click **Update** if you want to select a different XML file to import. In the Update File dialog box, click **Browse** and select a different XML file.

4. Do one of the following:
   - To import the components into a new changeset, select **New** and enter the name of the changeset.
   - To import the components into an existing changeset, select **Existing** and then select a changeset.
5. (Optional) Select the option to submit the changeset for publication to BRM right after the components are imported.
6. Click **OK**.

> **Note**
>
> If you encounter a server exception when importing a Service-Event Map XML file in the PDC UI, use the **ImportExportPricing** utility to create the service-event map.

Modifying a Changeset

You can modify the name and description of a changeset.

To modify a changeset:

1. In the Workspace task pane, select the changeset.

   The setup and pricing components in the changeset appears in the Changeset Details section.
2. Click **Edit**.

   The Edit Changeset dialog box appears.
3. Modify the changeset name and description as required.
4. (Optional) Select the **Set as Active Changeset** check box to make this changeset active. This check box is disabled if the changeset is active.
5. Click **OK**.

Related Topics

Specifying the Active Changeset

Deleting a Changeset

When you delete a changeset, all its components are also deleted.

To delete a changeset:

1. In the Workspace task pane, select a changeset and click the **Delete** icon.
2. In the confirmation message, click **OK**.

   If you deleted an active changeset, the Select Active Changeset dialog box appears. You can select any existing changeset to be set as active or create an active changeset. If only one changeset remains after you delete the active changeset, by default, it is set as active.

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Related Topics

Specifying the Active Changeset

Workspace Page Reference

Use the **Workspace** page to create and manage changesets.

For a description of the fields, see:

- Changeset Details Section

Changeset Details Section

Use the Changeset Details section to edit, validate, submit, or fix a changeset.

The following table describes the fields and buttons available in this section. Depending on the status of a changeset, only a subset of the fields and buttons might appear.

Field	Description
Name	Displays the name of the changeset.
Status	Displays the status of the changeset.
Created	Displays the date and time when the changeset was created.
Description	Displays the description of the changeset.
Submitted	Displays the date and time when the changeset was submitted. This field appears only for a changeset in Failed status.
Submission History	Click this link to open the Submission History dialog box. This link appears only for a changeset that is created when you fixed a failed changeset.
Edit	Click this button to edit the changeset. This button appears only for a changeset in Open status.
Validate	Click this button to validate the changeset. This button appears only for a changeset in Open status.
Submit	Click this button to submit the changeset. This button appears only for a changeset in Open status.
Fix	Click this button to fix the changeset. This button appears only for a changeset in Failed status.

The table in this section lists the setup and pricing components available in the changeset. Depending on the status of a changeset, only a subset of the columns in the table might appear.

Label	Description
Name	Displays the name of the setup or pricing component.
Type	Displays the type of the setup or pricing component.
Description	Displays the description of the setup or pricing component.

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Label	Description
Last Modified	Displays the date and time when the setup or pricing component was last modified. This column does not appear for a changeset in Failed status.
Status	This column appears only for a changeset in Open or Failed status. For an open changeset, this column displays the validation status of the setup or pricing component. For a failed changeset, this column displays one of the following transformation process statuses of the setup or pricing component: • **Success:** Specifies that the setup or pricing component is successfully transformed for all the associated target engines. • **Failed:** Specifies that the setup or pricing component failed to transform for all the associated target engines. • **Partial Success:** Specifies that the setup or pricing component failed to transform for some of the associated target engines. The tooltip on the status icon for each partially successful setup or pricing component lists the name of the associated target engine and the corresponding transformation status. The transformation-engine statuses are: – **DISPATCHED:** PDC dispatched the data to the transformation-engine queue. The engine has not yet returned a final acknowledgment. – **COMPLETED:** The transformation engine processed the data successfully, and PDC received an acknowledgment. – **FAILED:** The transformation engine failed to process the data.

Related Tasks

Validating a Changeset

Modifying a Changeset

Submitting a Changeset

Create Changeset Dialog Box

Use the Create Changeset dialog box to create a changeset.

Field	Description
Name	Enter the name of the changeset.
Description	Enter a description for the changeset.
Set as Active Changeset	(Optional) Select to make the changeset active upon creation. This check box is disabled if the changeset is active.

Related Tasks

Creating a Changeset

Edit Changeset Dialog Box

Use the Edit Changeset dialog box to modify the properties of an existing changeset.

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Field	Description
Name	Modify the name of the changeset.
Description	Modify the description of the changeset.
Set as Active Changeset	(Optional) Select to make the changeset active. This check box is disabled for an already active changeset.

Related Tasks

Modifying a Changeset

Export Dialog Box

Use the Export dialog box to export a changeset to an XML file.

Field	Description
Export all referenced pricing components	Select to export components in the selected changeset and all the components referenced by these components to an XML file. The referenced objects may belong to changesets other than the selected changeset.
Export only the pricing components in this changeset	Select to export the components in only the selected changeset to an XML file.

Related Tasks

Exporting Changesets

Import Dialog Box

Use the Import dialog box to import components from an XML file into a new or an existing changeset in the Draft status.

Field	Description
Browse	Click to find the XML file that you want to import. After you select the XML file, the **Browse** button is replaced by the **Update** button. Optionally, click **Update** if you want to select a different XML file to import.
New	Select to import the components from the XML file into a new changeset and then enter the name of the new changeset.
Existing	Select to import the components into an existing changeset and then select a changeset.
Submit imported pricing components immediately	Select to submit the changeset for publication to BRM right after the components are imported.

Related Tasks

Importing Pricing and Setup Components into Changesets

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Hide and Close Failed Changesets Dialog Box

Use the Hide and Close Failed changesets dialog box to close and hide failed changesets.

Field	Description
Close Hidden Changesets	Select to close all the failed changesets including the hidden failed changesets.

Related Tasks

Showing or Hiding Failed Changesets

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4

Charge Offers

Charge offers determine how customers can purchase and use your services and how you track and charge for usage. Each charge offer contains one or more charges, which specify the events to track and the fees to charge when the events occur.

To set up a charge offer, perform the following tasks:

1. Create the charge offer (see "Creating a Charge Offer").
2. Add charges to the charge offer (see "Adding Charges to a Charge Offer").
3. If necessary, add extended pricing features and date ranges to the charges (see "Adding Impact Categories and Time Periods to a Charge" and "Adding Date Ranges to a Charge").
4. Configure charge pricing (see "Setting Up Pricing for a Charge").

To make charge offers available for purchase, you group them, with discount offers, into bundles.

For an overview of charge offers, see "Configuring Charge Offers" in *PDC Creating Product Offerings*.

Related Topics

Discount Offers

Bundles

Creating a Charge Offer

To create a charge offer:

1. In the Pricing section of the navigation pane, under **Offers**, click **Create Charge Offer**. The **Create Charge Offer** page appears.
2. Enter general information. See "Specifying General Information for a Charge Offer" for more information.
3. Specify values for any product specification attributes configured in XML templates for charge offers. See "Specifying Product Specification Attribute Values" for more information.
4. Specify offer settings. See "Specifying Charge Offer Settings" for more information.
5. Optionally, add one or more deliverables. See "Adding Deliverables" for more information.
6. Add charges. See "Adding Charges to a Charge Offer" for more information.

Related Topics

Create Charge Offer Page Reference

Specifying General Information for a Charge Offer

To specify general information for a charge offer:

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1. In the **Create Charge Offer** page, enter a unique name and a description.
2. From the **Type** list, select a charge offer type.
3. From the **Applicable To** list, select the service to which the charge offer applies.

Related Topics

General Information Section

Creating a Charge Offer

Specifying Product Specification Attribute Values

If you have configured product specification attributes in an XML template file, you can specify values for them. The attributes and input types available depend on what is configured in the XML template file.

The values are validated against the XML template file. Any invalid values are highlighted and errors are displayed in a pop-up message.

See "About Product Specification Attributes for Pricing Components" in *PDC Creating Product Offerings* for more information.

Specifying Charge Offer Settings

The settings in this section have valid defaults, but you can change them.

To specify charge offer settings:

1. In the **Create Charge Offer** page, expand **Offer Settings**.
   The Offer Settings subsection appears.
2. In the **Available for Purchase** fields, specify the period during which customers can purchase the charge offer.
3. (Optional) In the **Cycle Alignment Day of Month** list, select the day of the month on which to align recurring charges and product validity. For example, select 5 to apply recurring charges on the 5th day of each month regardless of the billing or purchase date.
4. (Optional) Select a provisioning tag for the charge offer.
   In Oracle Communications Billing and Revenue Management (BRM), provisioning tags implement extended rating attributes (ERAs), which provide special charges or discounts based on a specific attribute of a service or an account, such as a telephone number.
5. (Optional) Select a supplier tax ID.
6. Enter the charge offer's priority.
   When multiple charge offers apply to the same service-event pair, your billing system can consider them in the order of their priority.
7. In the **Ownership Rules** fields, specify the number of charge offers that a customer can purchase and own at one time.
8. Specify whether customers can purchase only part of the offer.
9. Specify whether the charge offer is shared with all members of a corporate sharing group when it is purchased by the group's owner.
10. Specify whether to notify customers when their offer is about to expire.
11. Specify whether to notify customers after their offer has already expired.
12. Specify whether to notify customers when their offer is about to renew.

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13. Specify whether to notify customers after their offer has already passed the renewal date.
14. Specify what happens when you are using date ranges for versioning. From the **Existing subscriptions** menu, if you select **Continue to use the old rates and grants**, also specify whether to determine the balance impacts to apply based on the charge offer purchase date or the service instantiation date.
15. (Optional) Select the name of the tax exemption selector to apply.
16. Specify whether you want to round the validity for the charge offer.
17. Specify whether to charge for a full day or a partial day for the first day of the billing cycle.

Related Topics

Offer Settings Subsection

Creating a Charge Offer

Adding Deliverables

Use deliverables to specify when and how much revenue can be recognized from a customer's purchase of a good or service. A deliverable defines the type of good or service you are selling, its standalone selling price, its revenue earning schedule, and the revenue general ledger ID (G/L ID) to associate with financial transactions.

Add one or more deliverables to a charge offer when the following is true:

- Your company is using deliverable-based revenue recognition.
- The charge offer contains a recurring or one-time charge.

To add a deliverable to a charge offer:

1. In the **Create Charge Offer** page, expand the **Deliverables** section.
2. Click the **Add** icon in the table toolbar:



   The Select Deliverable dialog box appears.
3. Select a deliverable.
4. Click **OK**.

Related Topics

Deliverables Subsection

Creating a Charge Offer

Adding Charges to a Charge Offer

A charge specifies how to calculate the cost of an event. In a charge offer, you can configure charges for any event associated with the service to which the offer applies.

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> **Note**
>
> The charge features displayed in Oracle Communications Billing and Revenue Management Pricing Design Center (PDC) are determined by the pricing profile that you associate with the charge. Not all the features described in this procedure and related procedures are supported by all pricing profiles.

To add a charge to a charge offer, use one of the following procedures:

- Adding a New Charge
- Adding a New Fold Charge
- Adding an Existing Charge
- Adding an Existing Charge Selector

Related Topics

Charges Section

Adding a New Charge

See "Adding a New Fold Charge" to add a new fold charge.

To add a new charge of any other type:

1. In the Charges section of the **Create Charge Offer** page, from the **Add Charge** list, select **Add New Charge**.

   The Create Charge dialog box appears. See "Create Charge Dialog Box" for details.
2. From the **Charge Category** list, select the event category to which the charge applies.

   See "About Charge Categories" for descriptions of the categories.
3. From the **Charge Type** list, select the type of event to which the charge applies.
4. From the **Pricing Profile** list, select a pricing profile for the charge.
5. From the **Measured By** list, select the ratable usage metrics (RUMs) to use in the charge.

   To configure conditional balance impacts, select a RUM of type **Conditional**.

   This step does not apply to rollover charges.
6. (Optional) Select the **Using same pricing rule for all RUMs** option.

   > **Note**
   >
   > This option appears only if you selected multiple RUMs.

   If you select this option, a single charge tree is created for multiple RUMs. This enables you to quickly publish the charges to ECE.

   If you do not select this option, multiple charge trees are created for multiple RUMs, each representing the charge for a different RUM.
7. (Optional) Enter a name for the charge.

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If you leave this field blank, PDC generates a name.

8. From the **Stop Charging** list, select whether to stop applying charges to accounts that have an **Inactive** status, a **Cancelled** status, or a **Suspended Active** custom life cycle state.

> **Note**
>
> This setting also affects the rerating process. If you specify to:
>
> - Stop charging accounts with an **Inactive**, **Cancelled**, or **SuspendedActive** status, the charge is not used if it has that status during the rerate period.
> - Continue charging with an **Inactive**, **Cancelled**, or **SuspendedActive** status, the charge is used when it has that status during the rerate period.

9. From the **Currency** list, select the required charge currencies.

   This step does not apply to rollover charges.

10. (Optional) Select the **Use extended pricing features for this charge** option.

    If you select this option, the Charges tree is displayed when the charge first appears. You use the tree to add extended pricing features (such as impact categories, time periods, and price overrides) to the charge.

    If you do not select this option, the Charges tree is hidden and only a pricing table is displayed when the charge first appears. This enables you to quickly configure pricing for a simple charge.

    To display the hidden Charges tree, click the **Restore Pane** arrow in the lower-left corner of the Pricing Details section of the charge tab.

11. (Optional) In the Taxation section, specify when to apply taxes and how to apply taxes. See "Taxation Section" for details.

    This step does not apply to rollover charges.

12. (Usage charges only) In the Advanced section, specify settings for processing events. See "Advanced Section" for details.

13. (Recurring charges only) In the Cycle Settings section, specify settings for the following:

    - **In-Advance Billing**
    - **Cycle Alignment**
    - **Proration**

    See "Cycle Settings Section for Recurring Charges" for details.

> **Note**
>
> In-advance billing is supported only for cycle forward events, not cycle arrears or cycle forward arrears events.

14. (Rollover charges only) Under **Proration**, specify how the charge should be handled if the charge offer is purchased or canceled in the middle of a billing cycle. See "Proration Section for Rollovers" for details.

15. Click **OK**.

    A tab for the fold charge is added to the Charges section of the charge offer.

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You can now configure pricing for the charge.

Related Topics

Create Charge Dialog Box

Charges Tree

Adding Charges to a Charge Offer

Adding a New Fold Charge

Working with Charges

Setting Up Pricing for a Charge

Adding Additional Currencies to a Charge

To add additional currencies to a charge:

1. In the Charges section of the **Create Charge Offer** page, do one of the following:
   - If you are adding the currency to a multi-currency graph, click the **Charge Currency** list.
   - If you are adding the currency to a single currency graph, click the **Tier Currency** list.
2. Select **Add**.

   The Manage Currencies dialog box appears listing all the currencies that are available for the charge.
3. Select the required currencies.
4. Click **OK**.

   The selected currencies are added to the charge.

Related Topics

Charges Section

Adding Charges to a Charge Offer

Adding a New Fold Charge

Working with Charges

Setting Up Pricing for a Charge

Removing Currencies from a Charge

To remove currencies from a charge:

1. In the Charges section of the **Create Charge Offer** page, do one of the following:
   - If you are removing the currency from a multi currency graph, click the **Charge Currency** list.
   - If you are removing the currency from a single currency graph, click the **Tier Currency** list.
2. Select **Delete.**

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The Manage Currencies dialog box appears listing all the currencies that are configured for the charge.

3. Select the currencies to be removed.
4. Click **OK**.

   The selected currencies are removed from the charge.

Related Topics

Charges Section

Adding Charges to a Charge Offer

Adding a New Fold Charge

Working with Charges

Setting Up Pricing for a Charge

About Charge Categories

Charges can apply to the following categories of events:

Event Category	Description
Fold	Charges used to zero-out a balance, such as unused free minutes or to convert one balance to another. Fold charges must be associated with an existing charge selector whose event matches the fold event.
One-Time	Nonrecurring charges, such as setup or cancellation fees.
Recurring	Ongoing charges that are not generated or affected by usage, such as a monthly subscription fee.
Remittance	Charges that calculate the manner in which you share revenue with third parties, such as resellers or service providers. This category is available only for charge offers that apply to accounts.
Rollover	Charges that extend the validity of unused balances to succeeding cycles. For example, unused included minutes are often rolled over.
Usage	Charges for service usage, such as telephone calls or Internet sessions.

Related Topics

Adding Charges to a Charge Offer

Adding a New Fold Charge

To add a new fold charge:

1. In the Charges section of the **Create Charge Offer** page, from the **Add Charge** list, select **Add New Charge**.

   The Create Charge dialog box appears.
2. From the **Charge Category** list, select **Fold**.
3. Click **Search**.

   The Search for Charge Selectors dialog box appears.

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4. Search for a charge selector to add to the charge. See "Searching for Pricing Components" for more information.
5. In the Results section, select the charge selector to add, and click **OK**.
6. In the Create Charge dialog box, click **OK**.

   A tab for the charge is added to the Charges section of the charge offer.

   To edit the charge selector and its associated charges, click the **Charge Selector** link above the Rules section on the charge tab. See "Charge Selectors" for more information.

Related Topics

Charges Section

Adding Charges to a Charge Offer

Adding a New Charge

Working with Charges

Adding an Existing Charge

To add an existing charge:

1. In the Charges section of the **Create Charge Offer** page, from the **Add Charge** list, select **Add Existing Charge**.

   The Search for Charges dialog box appears.
2. Search for a charge to add to the charge offer. See "Searching for Pricing Components" for more information.
3. In the Results section, select the charge to add, and click **OK**.

   A tab for the charge is added to the Charges section of the charge offer.
4. (Optional) Modify the pricing in the charge.

> **Note**
>
> When using an existing charge, any changes you make to the charge, including price changes, will affect all the charge offers and charge selectors where this charge is used. To avoid unintended consequences of changing prices in a reusable charge, use the Change Price dialog box provided in the charge.

Related Topics

Search for Charge Selectors Dialog Box

Adding Charges to a Charge Offer

Setting Up Pricing for a Charge

Adding an Existing Charge Selector

See "Charge Selectors" for information about charge selectors.

To add an existing charge selector:

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1. In the Charges section of the **Create Charge Offer** page, from the **Add Charge** list, select **Add Existing Charge Selector**.

   The Search for Charge Selectors dialog box appears.
2. Search for a charge selector to add to the charge. See "Searching for Pricing Components" for more information.
3. In the Results section, select the charge selector to add, and click **OK**.

   A tab for the charge selector is added to the Charges section of the charge offer.
4. In the Charges section, click **Charge Selector Configuration**. See "Charge Selector Configuration" for more information.
5. Select **Proration Settings** from the list.

   The Proration Settings dialog box appears.
6. Specify how the charge should be handled if the charge selector is purchased or canceled in the middle of a customer's billing cycle by selecting one of the following options:
   - **Prorate**: Calculate the charge based on the amount used.
   - **Full Charge**: Charge for the entire cycle.
   - **No Charge**: Do not charge for the cycle.
7. Click **OK**.

> **Note**
>
> The proration settings are applicable to all charges in the charge selector.

8. (Optional) To edit the charge selector and its associated charges, click the **Charge Selector** link above the Rules section on the charge tab.
9. (Optional) To edit the charge selector and its associated charges, click the **Charge Selector** link above the Rules section on the charge tab.

Related Topics

Proration Settings Dialog Box

Adding Charges to a Charge Offer

Working with Charges

After adding a charge to a charge offer, you use the Charges tree to add extended pricing features, such as impact categories and time periods, to it.

> **Note**
>
> If you did not select the extended pricing option when you created the charge, the Charges tree is hidden. Display it by clicking the **Restore Pane** arrow in the lower-left corner of the Pricing Details section of the charge tab.

You then configure pricing for each branch of the Charges tree. If necessary, you can add date ranges to your charges and edit charge details.

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Related Topics

Adding Charges to a Charge Offer

About the Charges Tree

Adding Impact Categories and Time Periods to a Charge

Setting Up Pricing for a Charge

Adding Date Ranges to a Charge

Editing Charge Details

Removing a Charge from a Charge Offer

About the Charges Tree

Use the Charges tree to build a complex charge, which is a charge that contains extended pricing features, such as impact categories, time periods, and multiple pricing instances.

The Charges tree shows the hierarchical structure of a charge. Initially, the tree contains only the **Charges** root node. The pricing profile associated with a charge determines which elements can be added to the tree and the order in which they can be added.

The last node of each branch of the Charges tree is a pricing node. Each pricing node has its own pricing table or tables in which balance impacts for that branch of the tree are configured. The tables appear in the Pricing Details section of the charge tab when the pricing node is selected. When a node other than a pricing node is selected, read-only information about that node appears in the charge tab.

The Charges tree is typically used to configure usage charges, but it supports all charge categories except folds and rollovers.

Related Topics

Charges Tree

Displaying the Charges Tree

If the Charges tree is not visible, display it by clicking the **Restore Pane** arrow in the lower-left corner of the Pricing Details section of the charge tab:



Editing Charge Details

To edit details of a charge, such as the RUMs used to measure it or the currency to which it applies:

1. Open the charge offer that contains the charge.

   The **Charge Offer** page appears.

2. If the charge offer is in read-only mode, click **Edit** in the charge offer toolbar.
3. In the Charges section, click the appropriate charge tab.

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4. From the **Charge Actions** list, select **Charge Details**.

   The Charge Details dialog box appears.

5. Edit the details, and then click **OK**.

Related Topics

Charge Details Dialog Box

Adding Charges to a Charge Offer

Removing a Charge from a Charge Offer

To remove a charge from a charge offer:

1. Open the charge offer that contains the charge.
2. If the charge offer is in read-only mode, click **Edit** in the charge offer toolbar.
3. In the Charges section of the charge offer, click the charge tab.
4. From the **Charge Actions** list, select **Remove Charge**.
5. In the confirmation message, click **OK**.

   The charge is removed from the charge offer, but it is not deleted from PDC. See "Deleting Pricing Components" for information about deleting charge offers from PDC.

Adding Impact Categories and Time Periods to a Charge

After adding a charge to a charge offer, use the Charges tree to perform the following tasks:

- Add impact categories to the charge. See "Adding Impact Categories to a Charge" for more information.
- Add time periods to the charge. See "Adding Time Periods to a Charge" for more information.
- Group multiple impact categories or time periods to apply the same pricing configuration to all members of the group. See "Grouping Components in a Charge" for more information.

Related Topics

Charges Tree

Adding Impact Categories to a Charge

You use impact categories to enable a charge to apply different balance impacts based on various event attributes, such as the destination of a call.

To add impact categories to a charge:

1. In the Charges tree, select the root node, **Charges**.
2. From the **Add** or **Insert** list in the Charges tree, select **Impact Categories**.

   The Add Impact Categories dialog box appears.

3. Select the zone model that contains the appropriate impact categories.

   The impact categories in the selected zone model are listed in the dialog box.

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4. (Optional) To list enhanced impact categories for differentiated network services, select a Usage Scenario (USC) selector. See "USC Selectors" for more information.

   This step is mandatory if the Online Usage pricing profile is associated with the charge.

5. (Optional) To list enhanced impact categories for GPRS calls, select an Access Point Name (APN) selector. See " APN Selectors" for more information.

6. Select the impact categories to add to the charge.

7. (Optional) To add all the selected impact categories to the same node in the tree, select **Add Impact Categories As a Group.**

   Grouping impact categories enables you to use the same pricing for all the impact categories in the group.

8. Click **OK.**

   The impact categories are added as children of the **Charges** node.

Related Topics

Add Impact Categories Dialog Box

Adding Impact Categories and Time Periods to a Charge

Grouping Components in a Charge

Adding Time Periods to a Charge

You use time periods to charge different prices for the same service depending on the day and time the service is used.

To add time periods to a charge:

1. In the Charges tree, select the parent node for the time period.

   Possible parent nodes are **Charges** or an impact category.

2. From the **Insert** or **Add** list in the Charges tree, select **Time Periods**.

   The Add Time Periods dialog box appears.

3. Select a time model.

4. Select the time periods to add to the parent node.

5. Do one of the following:

   - To add each time period to a separate node, click **Add**.
   - The add the time periods to the same node, click **Add As a Group**.

     Grouping time periods enables you to use the same pricing for all the time periods in the group.

   The time periods are added as children of the selected parent node.

Related Topics

Add Time Periods Dialog Box

Adding Impact Categories and Time Periods to a Charge

Grouping Components in a Charge

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Grouping Components in a Charge

Grouping components on the same node in the Charges tree enables you to use the same pricing for all the components in the group. You can group the components either as you add them to the tree or after you add them.

To group components after adding them to the Charges tree:

1. In the Charges tree, right-click the node on which to group the components, and select **Group.**

   The Group dialog box appears.

2. Select the components to group on the node.

> **Note**
>
> If the selected components have child nodes, they will lose those nodes. Only the child nodes of the component currently residing on the selected node are retained.

3. Click **OK**.

   The components are moved to the selected node.

Related Topics

About the Charges Tree

Ungrouping Components in a Charge

Ungrouping Components in a Charge

Ungrouping components that currently reside on the same node in the Charges tree enables you to modify each component's pricing without affecting the pricing of the other components.

To ungroup components in a charge:

1. In the Charges tree, right-click the node containing the components to ungroup, and select **Ungroup.**

   The Ungroup dialog box appears.

2. Select the components to remove from the group.
3. Click **OK**.

   Individual nodes are added to the tree for the selected components. The original group's child nodes are copied to the new node of each former group member.

Related Topics

About the Charges Tree

Grouping Components in a Charge

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Setting Up Pricing for a Charge

After adding a charge to a charge offer, perform the following tasks to configure pricing for the charge:

- Add pricing instances if necessary. See "Adding Pricing to a Charge" for more information.
- Configure debit, credit, and counter balance impacts. See "Configuring Balance Impacts for Charges" for more information.
- Configure minimum charges for balance impacts. See "Specifying a Minimum Charge" for more information.
- Add effective periods to manage price changes. See "Adding Effective Periods to Charge Pricing" for more information.
- Add quantity ranges to vary prices based on usage. See "Adding Quantity Ranges to Charge Pricing" for more information.
- Add price tags to apply special pricing at purchase time. See "Adding Price Tags to One-Time and Recurring Charges" and "Adding Price Tags to Usage Charges" for more information.

After configuring pricing for a charge, you might need to perform the following task:

- Rename the pricing instance. See "Renaming Charge Pricing " for more information.

Related Topics

Adding Charges to a Charge Offer

About the Charges Tree

Adding Pricing to a Charge

If you do not select the extended pricing option when creating a charge, the charge initially contains a single new pricing instance. This is a simple charge, which contains no extended pricing features, such as impact categories and time periods. You do not add pricing to simple charges; you just configure their new pricing instance.

If you select the extended pricing option when creating a charge, the charge initially contains no pricing instances. After adding extended pricing features to the charge, you must add pricing to each branch of the Charges tree. A branch can have only one pricing node. The pricing node is the last node on a branch.

Depending on the pricing profile associated with a charge, you can add the following pricing elements to a charge:

- Pricing. See "Adding Pricing to a Charge" for more information.
- Price selector. See "Adding a Price Selector to a Charge" for more information.
- Generic selector. See "Adding a Generic Selector to a Charge" for more information.
- Price override. See "Adding a Price Override to a Charge" for more information.

Related Topics

About the Charges Tree

Setting Up Pricing for a Charge

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Adding Pricing to a Charge

To add pricing to a charge:

1. In the Charges tree, select the parent node for the pricing instance.

   Possible parent nodes are **Charges**, an impact category, or a time period.

2. From the **Add** list, select **Pricing**.

   A Pricing child node is added to the selected parent node, and a corresponding table is displayed in the Pricing Details section of the charge tab.

Related Topics

About the Charges Tree

Adding Pricing to a Charge

Adding a Price Selector to a Charge

To add a price selector to a charge:

1. In the Charges tree, select the parent node for the price selector.
2. From the **Add** list, select **Price Selector**.

   The Search for Price Selectors dialog box appears.

3. Search for a price selector to add to the charge. See "Searching for Pricing Components" for more information.
4. In the Results section, select a price selector to add to the charge, and click **OK**.

   The price selector is added to the Charges tree.

5. (Optional) To edit the price selector and its associated charges, click the **Price Selector** link above the Rules section in the charge tab.

Related Topics

Search for Price Selectors Dialog Box

Price Selectors

About the Charges Tree

Adding Pricing to a Charge

Adding a Generic Selector to a Charge

To add a generic selector to a charge:

1. In the Charges tree, select the parent node for the generic selector.
2. From the **Add** list, select **Generic Selector**.

   The Add Generic Selector dialog box appears.

3. From the **Generic Selector** list, select the generic selector to add to the charge.
4. From the **Generic selector results to add** list, select the generic selector results to add to the charge and click **OK**.

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The generic selector results are added to the Charges tree.

5. (Optional) Select **Add Generic Selector results as a group**, which adds all the selected generic selector rules to the same node in the Charges tree.

   If necessary, you can later ungroup the generic selector rules to individual nodes.

6. (Optional) To edit the generic selector and its associated rules, from the Charges tree, select the node for the generic selector rule and click the **Generic Selector** link in the Generic Selector Details section.

Related Topics

Add Generic Selector Dialog Box

Generic Selectors

Grouping Components in a Charge

Ungrouping Components in a Charge

About the Charges Tree

Adding Pricing to a Charge

Adding a Price Override to a Charge

A price override replaces or adjusts a previously applied charge. For example, suppose a content provider has specified a price for downloading its content. The service provider who makes the content available to customers and does the billing might use a price override to add a surcharge or a discount to the content provider's original price.

To add a price override to a charge:

1. In the Charges tree, select the parent node for the price override.
2. From the **Add** list, select **Price Override**.

   A Price Override child node is added to the selected parent node, and a corresponding table is displayed in the charge.

3. In the **Impact to Original Price** column, select the type of override.
4. In the **Amount** column, enter the amount of the override.
5. In the **Balance Element** column, select the balance element affected by the override.
6. In the **Measured By** column, select the RUMs to use in the price override.

> **Note**
>
> The **Measured By** column appears only if you selected to create a single charge tree for multiple RUMs when adding a charge.

7. In the **GLID** column, enter the general ledger (G/L) ID for the event associated with the charge.

Related Topics

About the Charges Tree

Adding Pricing to a Charge

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Configuring Balance Impacts for Charges

Balance impacts define how a charge affects a specified balance in an account.

Each charge can contain one or more balance impacts. For example, you can configure different balance impacts for different impact categories, different time periods, and different balance elements in the same charge.

For all charges except folds and rollovers, balance impacts are specified in the Pricing Details section of the charge tab or in the associated price selector.

For folds, balance impacts are specified in the associated charge selector.

For rollovers, balance impacts are specified in the Rollover Rules section of the charge tab.

Because charge and price selectors reference existing charges and pricing in which balance impacts are already configured, all balance impacts are ultimately configured in the tables in the Pricing Details or Rollover Rules section of a charge.

Each row in those tables represent a balance impact. To configure balance impacts for charges, you configure, add, and delete rows. The information required in each row depends on the charge category and pricing profile associated with the charge.

> ⚠ **Caution**
>
> Changing balance impacts in charges that are used in multiple places can impact all the components that use it. See "Modifying Pricing without Inadvertently Affecting Other Components" for information about avoiding unintended consequences when changing pricing.

Related Topics

Adding Balance Impacts to Charges

Adding Balance Impacts to Fold Charges

Adding Balance Impacts to Rollover Charges

Configuring Counters for Charges

Configuring Conditional Balance Impacts

Setting Up Pricing for a Charge

Adding Balance Impacts to Charges

To add a balance impact to a charge:

1. In the Pricing Details section, click the **Add Balance Impact** icon in the pricing table toolbar:



2. Edit the values for the balance impact.

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Related Topics

Pricing Table

Configuring Balance Impacts for Charges

Adding Balance Impacts to Fold Charges

To add a balance impact to a fold charge:

1. In the Pricing Details section, click the **Add Balance Impact** icon in the pricing table toolbar.
2. Edit the values for the **Debit** balance impact.

   See "Pricing Table" for details.
3. Click the **Add Balance Impact** icon to add **Credit** balance impacts.

   The Debit balance impact is converted into each Credit balance impact that you specify.

Related Topics

Pricing Table

Configuring Balance Impacts for Charges

Adding Balance Impacts to Rollover Charges

To add a balance impact to a rollover charge:

1. In the Rollover Rules section, click the **Create Balance Impact** icon in the table toolbar:

   A row for the new balance impact is added to the table.
2. Edit the values for the balance impact.

   See "Rollover Rules Section" for details.

Related Topics

Rollover Rules Section

Configuring Balance Impacts for Charges

Configuring Counters for Charges

Counters track a balance for a specified period, increasing or decreasing the balance accordingly. For example, a counter can track the number of minutes talked during a period. The total number of minutes talked can then be used to determine a billing-time discount.

To configure a counter for a charge:

1. In the Pricing Details section, click the **Add Counter** icon in the pricing table toolbar:

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A row for the new counter is added to the table.

2. Edit the values for the counter.

   See "Pricing Table" for details.

Related Topics

Pricing Table

Configuring Balance Impacts for Charges

Configuring Conditional Balance Impacts

Conditional balance impacts credit or debit a customer's balance when the customer uses a charge offer for the first time within a specified period; for example, the first time in a day or the first time in two days. For example, you can use conditional balance impacts to grant daily included minutes to a customer, instead of using recurring events.

You can configure conditional balance impacts only for a charge that includes a RUM of type **Conditional**. If a charge uses multiple RUMs, the conditional balance impact is displayed only in the tab for the RUM of type **Conditional**. Conditional balance impacts are applicable only for charges with the Convergent Usage pricing profile.

> **Note**
>
> Conditional balance impacts can only be used with charge offers that are associated with a service, not with the charge offers associated with an account.

To configure conditional balance impacts:

1. In the Pricing Details section, click the **Add Balance Impact** icon in the pricing table toolbar.



2. Edit the values for the conditional balance impact.

   See "Pricing Table" for details.

Related Topics

Pricing Table

Configuring Balance Impacts for Charges

Adding Multiple Validity Periods to Noncurrency Balance Impacts

> **Note**
>
> This functionality is supported only for recurring and one-time charges that have validity periods with a specified end date.

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You can add multiple validity periods to a noncurrency balance impact. This allows you to distribute free minutes, Gigabytes, or so on in smaller portions on an incremental basis. For example, you could distribute 500 free minutes to your customers in 100-minute buckets every 7 days.

To add multiple validity periods to noncurrency balance impacts:

1. In the Pricing Details section, click the link in the **Amount Is Valid** column on the pricing table toolbar.

   The Amount is Valid dialog box appears.

2. Specify a validity start date and a fixed validity end date.

   Additional fields are displayed in the Amount is Valid dialog box if you entered a fixed end date.

3. In the **Distribute Credit** list, select one of these options:

   - **All at once**: All of the noncurrency resources are granted at the start of the validity period.
   - **Periodically over a fixed period**: The noncurrency resources are granted in buckets on an incremental basis, such as daily. This splits the noncurrency resources into multiple incremental validity periods.

4. Specify the length of the incremental validity periods, such as 5 hours or 14 days.
5. In the **Unused Credit Valid Until** list, select one of the following:

   - **The end of the periodic distribution period:** Each bucket of noncurrency resources expires at the end of its incremental validity period.
   - **The end of the overall validity period:** All of the noncurrency resources expire at the end of the total validity period.

6. Click **OK**.

Related Topics

Amount Is Valid Dialog Box

Setting Up Pricing for a Charge

Specifying a Minimum Charge

You can specify a minimum amount to charge for each balance element in a pricing instance. The minimum charge applies only to the current tier and effective period.

To specify a minimum charge:

1. If the charge has multiple tiers or effective periods, select a tier and an effective period.
2. In the Pricing Details section, click the **Minimum Charges** icon in the toolbar of the first pricing table:

   The Edit Minimum Charge dialog box appears.

3. Enter a minimum charge for one or more balance elements in the pricing instance.

   The minimum charge applies only to the current tier and effective period.

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4. Click **OK**.

Related Topics

Pricing Details Section

Setting Up Pricing for a Charge

Adding Effective Periods to Charge Pricing

You add an effective period to pricing to make a price modification take effect on a future date.

To add pricing effective periods:

1. In the Pricing Details section, click the **Change Price** icon in the pricing table toolbar:



   The Change Price dialog box appears.
2. Select one of the options to indicate the scope of the price change:
   - **This charge wherever it is used**

     Affects every component that uses this charge.
   - **The current offer only**

     Affects only this charge offer. Other components that use the charge are not affected.
3. In the Change Price section, select **Effective On**.
4. Click the **Select Date** icon, select the start date of the new effective period, and click **OK**.

   A new effective period is added to the pricing. A copy of the pricing details for the preceding effective period is associated with the new period.
5. In the new effective period, make the appropriate price change.

> **Note**
>
> When pricing has multiple effective periods, a **Prices Effective** list appears above the pricing table or set of tables to enable you to display the pricing details for each period.

Related Topics

Change Price Dialog Box

Setting Up Pricing for a Charge

Deleting Effective Periods from Charge Pricing

To delete pricing effective periods:

1. In the Pricing Details section, click the link in the **Prices Effective** field.
2. From the list, select **Manage**.

   The Manage Effective Periods dialog box appears.

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3. Select the effective period you want to delete.
4. Click the **Delete** icon in the table toolbar:



5. In the confirmation message, click **Yes**.

   The new effective period appears in the table.
6. In the Manage Effective Periods dialog box, click **OK**.

   The effective period and its pricing are deleted.

Related Topics

Manage Effective Periods Dialog Box

Adding Effective Periods to Charge Pricing

Setting Up Pricing for a Charge

Changing the Start Date of Effective Periods in Charge Pricing

To change the start date of pricing effective periods:

1. In the Pricing Details section, click the link in the **Prices Effective** field.
2. From the list, select **Manage**.

   The Manage Effective Periods dialog box appears.
3. In the **Start** column of the period you want to modify, enter a new start date.
4. Click **OK**.

   The start date of the effective period is updated.

Related Topics

Manage Effective Periods Dialog Box

Adding Effective Periods to Charge Pricing

Setting Up Pricing for a Charge

Adding Quantity Ranges to Charge Pricing

To vary charges based on the level of usage or frequency of occurrence, add quantity ranges and configure different balance impacts for each range.

To add a quantity range to charge pricing:

1. If the pricing contains multiple tiers, effective periods, or both, select a tier and an effective period in the Pricing Details section.

   The quantity range is added only to the selected tier and effective period.
2. In the Pricing Details section, click the **Add Quantity Range** icon in the pricing table toolbar:



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The Add Quantity Range dialog box appears.

3. Select **Numeric Quantity Range**.
4. In the **Starting At** field, enter the starting numeric value for the new range.
5. Click **OK**.

   A pricing table for the range is added, in sequence, to the pricing instance. PDC automatically generates an end value for the range based on the existing quantity ranges.

Related Topics

Pricing Details Section

Setting Up Pricing for a Charge

Adding Ranges for Usage Pricing

You can configure usage charges to consume your customers' granted allowances, such as free minutes or free movie downloads, before applying any usage charges. To do so, add multiple ranges to the usage charge. For each range, configure whether it consumes a granted noncurrency balance element or bases pricing on a numeric quantity range.

> **Note**
>
> - PDC always organizes ranges with a granted noncurrency balance element before ranges based on a numeric quantity.
> - PDC applies the ranges of granted noncurrency balance elements in the order displayed on the screen. To change the order in which they are applied, see "Changing the Order that Granted Allowances Are Consumed".
> - This functionality is supported only by the ECE rating engine.

To add ranges for usage pricing:

1. If the pricing contains multiple tiers, effective periods, or both, select a tier and an effective period in the Pricing Details section.

   The quantity range is added only to the selected tier and effective period.
2. In the Pricing Details section, click the **Add Quantity Range** icon in the pricing table toolbar:

   The Add Quantity Range dialog box appears.
3. To consume a granted allowance, such as free minutes or free data:
   a. Select **Consume Granted Balance Element**.
   b. In the **Balance Element** field, select the noncurrency balance element to consume, such as free minutes, MB used, or Free Games.
4. To vary pricing based on the quantity used:
   a. Select **Numeric Quantity Range**.

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b. In the **Starting At** field, enter the starting numeric value for the new range.

5. Click **OK**.

   A pricing table for the range is added, in sequence, to the pricing instance. PDC automatically generates an end value for the range based on the existing quantity ranges.

Related Topics

Pricing Details Section

Setting Up Pricing for a Charge

Changing the Start and End Values of Quantity Ranges in Charge Pricing

To change the start and end dates of a quantity range:

1. If the pricing contains multiple tiers, effective periods, or both, in the Pricing Details section, select the tier and effective period that contain the quantity range.
2. Above the pricing table, click the **Quantity Range** link.

   The Edit Quantity Range dialog box appears.
3. Modify the values in the **Start** and **End** fields.

   The **Start** field is available only for the first quantity range in the pricing. To modify the start value of subsequent ranges, change the end value of the range that precedes them.

   By default, the first quantity range has no minimum start value. To specify a minimum start value, first deselect **No Minimum**.

   You cannot enter a value that includes the entire following quantity range. Instead, to extend a range beyond the following range, first delete the following range.

   By default, the last quantity range has no maximum end value. To specify a maximum end value, first deselect **No Maximum**.
4. Click **OK**.

   The selected range is updated. If necessary, the preceding and following ranges are also updated to accommodate the change.

Related Topics

Pricing Details Section

Adding Quantity Ranges to Charge Pricing

Changing the Noncurrency Balance Element in Quantity Ranges

If the pricing contains multiple tiers, effective periods, or both, you can change the type of noncurrency balance element that is consumed.

To change the noncurrency balance element to consume for a quantity range:

1. Above the pricing table, click the link next to **Quantity Range**. For example, click Until balance of Free Minutes consumed.

   The Edit Quantity Range dialog box appears.
2. In the **Balance Element** list, select the name of the noncurrency balance element to consume.

   This specifies to consume the entire granted allowance of minutes, gigabytes, or so on.

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3. Click **OK**.

   The selected range is updated for the new noncurrency balance element.

Related Topics

Pricing Details Section

Adding Quantity Ranges to Charge Pricing

Changing the Order that Granted Allowances Are Consumed

ECE consumes your customers' granted allowances in the order listed in the PDC Pricing Details page. For example, if free movie downloads are listed first and tokens are listed second, ECE consumes your customers' allowance of free movie downloads before consuming their allowance of tokens. You can change the order of consumption by using the Reorder Balance Element Quantity Ranges dialog box.

To change the order that granted allowances are consumed:

1. In the Pricing Details section, click the **Reorder Balance Element Quantity Ranges** icon in the pricing table toolbar:

   The Reorder Balance Element Quantity Ranges dialog box appears and lists the order in which noncurrency balance elements are consumed.
2. Change the order by selecting a balance element and then clicking the up or down arrow.

   The balance element moves up or down, depending on your selection.
3. Click **OK**.

Related Topics

Properties for All Quantity Ranges

Adding Quantity Ranges to Charge Pricing

Editing Quantity Range Properties

Some pricing profiles enable you to edit properties, such as credit limits, that apply to all quantity ranges and effective periods in the current pricing instance. Other pricing profiles enable you only to view such properties.

> **Note**
>
> If a pricing instance contains multiple price tiers, this procedure applies only to the current price tier.

To edit or view properties that apply to all quantity ranges:

1. In the Pricing Details section, click the **Edit Quantity Range Properties** icon in the pricing table toolbar:

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The Properties for All Quantity Ranges dialog box appears.

2. Edit the fields in the dialog box as necessary.
3. Click **OK**.

Related Topics

Properties for All Quantity Ranges

Adding Quantity Ranges to Charge Pricing

Automatically Renewing Granted Allowances

You can configure granted allowances to automatically renew once the resources of the previous grant have been depleted. For example, you can automatically renew 5 free minutes after each consumption of 10 MB data. This enables continuous access to the granted resource without requiring manual renewal.

To configure automatic renewals for granted allowances:

1. If the pricing contains multiple tiers, effective periods, or both, select a tier and an effective period in the Pricing Details section.

   The quantity range is added only to the selected tier and effective period.
2. In the Pricing Details section, click the **Add Quantity Range** icon in the pricing table toolbar:



The Add Quantity Range dialog box appears.

3. Select **Auto Renew Balance Element**.
4. In the **Renew Balance Element** drop-down list, select the balance element that you want to renew.
5. (Optional) If you want to renew another balance element once the selected balance element expires, select the balance element to apply the renewal limits for under **Select balance elements to track the renewal limits for**.
   Select the balance element to track the maximum number of renewals allowed in the **Occurence** drop-down menu. Select the balance element to track the maximum currency amount for which renewals are allowed in the **Amount** drop-down menu. For example, granting one free song 5 times or renewals not exceeding 10 US Dollars.
6. (Optional) If you want to renew the balance element using another balance element as a tracker, enter the amount in **Renew the balance element once... are consumed**. For example, renew a charge when 100 free minutes are consumed.
7. Select **OK**.

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Adding Price Tags to One-Time and Recurring Charges

You can use price tags to apply special prices to charges at purchase time according to rules defined in setup components. You add price tags to the balance impacts of one-time and recurring charges. You can later edit or remove these tags as required.

To add a price tag to the balance impact of a one-time or recurring charge:

1. In the Pricing Details section of the charge tab, select a balance impact.
2. Click the **Price Tag** icon in the pricing table toolbar:



   The Price Tag dialog box appears. See "Price Tag Dialog Box" for details.
3. From the **Price tag for** list, select **Amount**.
4. From the **Name** list, select a price tag name. Only the price tags that are valid for the charge are shown.
5. (Optional) Enter a description of the price tag.
6. Click **OK**.

Related Topics

Price Tag Dialog Box

Setting Up Pricing for a Charge

Adding Price Tags to Usage Charges

You can use price tags to apply special prices to charges at purchase time according to rules defined in setup components. You add price tags to the balance impacts or quantity ranges of usage charges. You can later edit or remove these tags as required.

> **Note**
>
> You can add price tags only for usage charges with the Convergent Usage pricing profile.

To add a price tag to a usage charge:

1. In the Pricing Details section of the charge tab, select a balance impact.
2. Click the **Price Tag** icon in the pricing table toolbar.



   The Price Tag dialog box appears. See "Price Tag Dialog Box" for details.

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3. From the **Price tag for** list, select the price tag name. Only the price tags that are valid for the charge are shown.

   If you selected **Amount** or **Increment**, proceed to step 7.

   To add price tags for a quantity range, click the **Quantity Range** link.

   The Edit Quantity Range dialog box appears.

4. Modify the values in the **Start** and **End** fields.

   The **Start** field is available only for the first quantity range in the pricing. To modify the start value of subsequent ranges, change the end value of the range that precedes them.

   By default, the first quantity range has no minimum start value. To specify a minimum start value, first deselect **No Minimum**.

   You cannot enter a value that includes the entire following quantity range. Instead, to extend a range beyond the following range, first delete the following range.

   By default, the last quantity range has no maximum end value. To specify a maximum end value, first deselect **No Maximum**.

5. Expand **Price Tag**.
6. From the **Attribute** list, select **End**.
7. Select a price tag from the list. Only the price tags that are valid for the charge are shown.
8. (Optional) Enter the description for the price tag.
9. Click **OK**.

Related Topics

Price Tag Dialog Box

Setting Up Pricing for a Charge

Identifying the Components That Share a Charge

To identify the components that share a charge:

- In the charge section of the charge offer, click **Used By**.

  The **Used By** button is available only when the charge is used by another component.

  The Used By page appears. This page provides an expandable hierarchical view of all the components that use the charge.

  See "Used By Search" for more information.

Related Topics

Adding an Existing Charge

Modifying Pricing without Inadvertently Affecting Other Components

When you modify pricing in a charge used by multiple components, PDC enables you to specify which of those components you want your changes to affect.

To specify which components are affected when you modify pricing in a charge:

1. In the Pricing Details section, click the **Change Price** icon in the pricing table toolbar:

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The Change Price dialog box appears.

2. Select one of the following options to indicate the scope of the price change:
   - **This charge wherever it is used**

     Affects every component that uses this charge.
   - **The current offer only**

     Affects only this charge offer. Other components that use the charge are not affected.
3. (Optional) To make the change take effect on a future date, do the following:
   a. In the Change Price section, select **Effective On**.
   b. Click the **Select Date** icon, select the start date of the new effective period, and click **OK**.

      A new effective period is added to the pricing. A copy of the pricing details for the preceding effective period is associated with the new period.

> **Note**
>
> When pricing has multiple effective periods, a **Prices Effective** list appears above the pricing table or set of tables to enable you to display the pricing details for each period.

Related Topics

Change Price Dialog Box

Adding Effective Periods to Charge Pricing

Renaming Charge Pricing

By default, all pricing instances are named "Pricing." You can use the pricing name to filter the charge for the discount.

You are not required to change the default name, but you can do so if you want to.

To rename pricing:

1. In the Charges tree, select a pricing node.

   The selected pricing appears in the Pricing Details section of the charge.
2. From the **Pricing Actions** list in the Charges tree, select **Rename Pricing**.

   The Rename Pricing dialog box appears.
3. In the **Pricing Name** field, enter a unique name for the pricing.
4. Click **OK**.

   The new name of the pricing appears in the Charges tree and in the heading of the Pricing Details section.

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Related Topics

Pricing Details Section

Setting Up Pricing for a Charge

Adding Price Tiers

After creating a single charge tree for multiple RUMs, you can add pricing tiers for any applicable RUMs configured in the charge.

To add a price tier:

1. In the Charges tree, select a pricing node.

   The selected pricing appears in the Pricing Details section of the charge.
2. From the **Pricing Actions** list in the Charges tree, select **Add Price Tier**.

   The Add Price Tier dialog box appears.
3. In the **Measured By** field, select any RUM from the list of available RUMs.
4. Click **OK**.

   The price tier is created and it appears in the Charges tree and in the heading of the Pricing Details section.

Related Topics

Pricing Details Section

Setting Up Pricing for a Charge

Removing Price Tiers

From a single charge tree for multiple RUMs, you can remove pricing tiers for any RUMs configured in the charge.

To remove a price tier:

1. In the Charges tree, select a pricing node.

   The selected pricing appears in the Pricing Details section of the charge.
2. From the **Pricing Actions** list in the Charges tree, select **Remove Price Tier**.

   The Remove Price Tier dialog box appears.
3. In the **Measured By** field, select the RUM for which you want to remove the price tier.
4. Click **OK**.

   The price tier is removed from the Charges tree.

Related Topics

Pricing Details Section

Setting Up Pricing for a Charge

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Deleting a Pricing Tag

To delete a pricing tag from a charge pricing:

1. In the Pricing Details section of the charge tab, select a balance impact.
2. Click the **Price Tag** icon in the pricing table toolbar.



The Price Tag dialog box appears.

3. From the **Name** list, select **Not Set**.
4. Click **OK**.

Related Topics

Pricing Details Section

Adding Price Tags to Usage Charges

Adding Date Ranges to a Charge

The date range of a charge is the period during which a charge is effective. By default, this period starts immediately and never ends.

Optionally, you can add more date ranges or modify the default date range. Each date range has its own pricing configuration. Adding date ranges enables you to make structural changes to a charge for different time periods.

To add a date range to a charge:

1. From the **Charge Actions** list, select **New Date Range**.

   The New Date Range dialog box appears.
2. From the **Type** list, select a value.
3. (For fixed periods Only) In the **Date Range Effective** field, enter the start date for the new range.

   PDC calculates the end date based on the existing date ranges.
4. (For relative periods Only) Change one or both of the following times:
   - **Start** time: Deselect **Immediately**, and enter the number of days, hours, minutes, or seconds after the purchase time that the charge takes effect.
   - **End** time: Deselect **Never Ends**, and enter the number of days, hours, minutes, or seconds after the start time that the charge is no longer effective.
5. Click **OK**.

   The new date range is added to the charge. The data in its Charges tree and pricing are copied from the preceding date range.

Related Topics

New Date Range Dialog Box

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Working with Charges

Modifying Date Ranges in a Charge

To modify the date range in a charge containing only one date range:

1. Create a temporary date range:
   a. From the **Charge Actions** list, select **New Date Range**.

      The New Date Range dialog box appears.
   b. Click **OK**.

      A **Date Range** list appears in the top-left corner of the charge tab.
2. From the **Date Range** list, select **Manage**.

   The Manage Date Ranges dialog box appears.
3. In the table, select the temporary date range, and delete it.
4. Select the remaining date range.
5. Click the **Edit** icon:

   The Edit Date Range dialog box appears.
6. Change the values in the fields as necessary.
7. Click **OK** and **OK**.

To modify a date range in a charge containing multiple date ranges:

1. From the **Date Range** list, select **Manage**.

   The Manage Date Ranges dialog box appears.
2. In the Manage Date Ranges section, select a date range in the table.
3. Click the **Edit** icon.

   The Edit Date Range dialog box appears.
4. Change the values in the fields as necessary.
5. Click **OK** and **OK**.

Related Topics

New Date Range Dialog Box

Edit Date Range Dialog Box

Working with Charges

Create Charge Offer Page Reference

Use the **Create Charge Offer** page to create charge offers and the charges and pricing they contain.

For a description of the fields, see the following:

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- General Information Section
- Offer Settings Subsection
- Charges Section

General Information Section

Use the General Information section to provide general information and settings for the charge offer.

For a description of the subsections in General Information, see:

- Product Specification Attributes Subsection
- Offer Settings Subsection
- Deliverables Subsection

Field	Description
Name, Description	Enter a unique name and a description.
Type	Select a type for the charge offer: • **Item:** A one-time purchase fee only. • **Subscription:** Charges for any type and combination of events, including one-time, recurring, usage, rollover, remittance, and fold. These charges apply only to the subscriber who owns the charge offer. • **System:** Charges that apply to all subscribers who use a particular service.
Applicable To	Select the service to which the charge offer applies. **Note:** If the charge offer does not apply to a specific service, select **Account**. For example, you might do this for late charges or for coupons. The charge offer can then be used to rate any event associated with the word *Account* in the service-event map.
Phase	Displays one of the following charge offer statuses: • **Draft:** The charge offer belongs to one of your unsubmitted changesets. Only you have access to it. • **Promoted:** The charge offer belongs to a submitted changeset. All PDC users have access to it. After you edit and save a promoted charge offer, its status changes to Draft, and only you have access to it. This field is read-only.

Related Tasks

Creating a Charge Offer

Product Specification Attributes Subsection

Use the Product Specification Attributes subsection to provide values for any product specification attributes configured in XML template files. The fields available in this subsection depend on what is configured in the XML template file.

See "About Extended Attributes for Pricing Components" in *PDC Creating Product Offerings* for more information.

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Offer Settings Subsection

Use the Offer Settings subsection to modify default charge offer settings.

Field	Description
Available for Purchase	Specify when the charge offer can be purchased. For the start date, either select **Immediately** or enter a date and time in the **Start** field. For the end date, either select **Never** or enter a date and time in the **End** field. The start date is included in the purchase period, but the end date is not. For example, if the start date is May 1 and the end date is May 10, the offer can be purchased from May 1 through May 9. To be added to a bundle, a charge offer must have a purchase period that is the same as or greater than the bundle's purchase period.
Cycle Alignment Day of Month	(Optional) Select the day of the month on which to align recurring charges and product validity. For example, you can apply recurring charges on the 5th day of each month regardless of the billing or purchase date. **Note**: This option applies only to recurring charges in the charge offer.
Provisioning Tag	(Optional) Select a provisioning tag for the charge offer. In BRM, provisioning tags are used to implement extended rating attributes (ERAs), such as a discount for calls to friends and family on a subscriber's birthday, or to configure telco service extensions and supplementary services, such as call forwarding and call blocking.
Supplier Tax ID	(Optional) Select a supplier tax ID for the charge offer. This ID specifies the company or corporate division that sells the product and is responsible for collecting taxes for it.
Priority	Enter the priority for the charge offer. When more than one charge offer applies to the same event, this priority determines the order in which your billing system considers the charge offers. The higher the number, the higher the priority; 0 is the lowest priority.
Customers Can Purchase	Specify the number of charge offers that a customer can buy at one time. To specify limits, deselect **No Minimum** and **No Maximum**, and then enter values in the **Minimum** and **Maximum** fields. The minimum and maximum values are included in the valid range.
Customers Can Own	Specify the number of charge offers that a customer can own at one time. To specify limits, deselect **No Minimum** and **No Maximum**, and then enter values in the **Minimum** and **Maximum** fields. The minimum and maximum values are included in the valid range. For example, if a website charge offer provides 100 MB of disk space, you can limit customers to 500 MB by setting the maximum ownership quantity to 5.
Can be purchased in partial/ fractional amounts	To enable partial purchases, select this check box. This option is used by another application, such as Customer Center, to determine whether customers can purchase only part of the charge offer.
Share charge offer with members of billing hierarchy	To enable charge offer sharing with all members of a corporate sharing group, select this check box.

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Field	Description
Notify subscriber prior to offer expiration	To notify your customers when their charge offer is about to expire, select this check box.
Notify subscriber after offer expiration	To notify your customers after their charge offer has expired, select this check box.
Notify subscriber prior to offer renewal	To notify your customers when their charge offer is about to renew, select this check box.
Notify subscriber after offer renewal	To notify your customers after their charge offer has already passed the renewal date, select this check box.
Tax Exemption Selector	Select the name of the tax exemption selector to apply.
Attempt Rental Fee Deduction Again if Credit is Insufficient	Specify the maximum number of times to retry the subscription before it fails. For example, to configure retry of failed subscriptions a maximum of 3 times, every 6 hours, set **Retry every** field to **6** and select **Hour** from the drop-down list. Set **Max number of retries** field to 3. **Note**: This field is applicable only when you set **When Subscriber has insufficient Credit** field as **Subscription fails**, **Subscription fails and is canceled**, or **Charge minimum configured amount**.
Existing subscriptions	Specify whether customers who subscribe during one date range will keep the same rates and grants after that range ends, or move to the new rates and grants configured in the next date range.
Determine the rates and grants based on	This field appears if you select **Continue to use the old rates and grants** from the **Existing subscriptions** menu. Specify whether which rates and grants to apply is determined based on the charge offer's purchase date or the service's instantiation date.
Validity Rounding	(Optional) Specify one of the options for the charge offer's validity period: • **Starts at midnight**: Starts at midnight (00:00:00) of the day that the charge offer is purchased. • **Use purchase time**: Starts at the time of purchase. • **Use system default**: Uses deployment's systemwide setting.
Charge For Full Day	(Optional) Specify one of the options to calculate the charge: • **Not Set**: Uses deployment's systemwide setting. • **Yes**: Calculates charge based on full days. • **No**: Calculates charge based on the **validityRounding** setting.

Related Tasks

Creating a Charge Offer

Specifying Charge Offer Settings

Deliverables Subsection

Use the Deliverables subsection to associate one or more deliverables with a charge offer.

> **Note**
>
> Add deliverables only if your company uses deliverable-based revenue recognition and the charge offer contains a recurring or one-time charge.

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Field	Description
Add 	Click to add a deliverable.
Delete 	Click to delete a deliverable.
Deliverables table	View the deliverables associated with the charge offer.

Related Topics

Creating a Charge Offer

Select Deliverable Dialog Box

Use the Select Deliverable dialog box to specify which deliverable to associate with the charge offer. For each deliverable, the table shows:

- **Name**
- **Type**, which can be **Physical product**, **Manual service**, or **Service**.

Select a deliverable and then click **OK**.

Charges Section

Use the Charges section to add charges to a charge offer.

For a description of the fields in this section, see the following:

- Add Charge List
- Charge Selector Configuration
- Used By Button
- Charge Actions List
- Charges Tree
- Pricing Details Section
- Pricing Table
- Rollover Rules Section
- Price Override Section

Related Tasks

Adding Charges to a Charge Offer

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Add Charge List

Use the **Add Charge** list to add charges to a charge offer.

List Item	Description
Add New Charge	Select this item to create a charge.
Add Existing Charge	Select this item to add an existing charge to the charge offer.
Add Existing Charge Selector	Select this item to add an existing charge selector to the charge offer. **Note:** When you add a charge selector to a charge, the charge selector is read-only. To edit the selector, click the selector name link in the **Charge Selector** field at the top of the charge tab. The selector appears in an editable tab.

Related Tasks

Adding a New Charge

Adding an Existing Charge

Adding an Existing Charge Selector

Charge Selector Configuration

Use the **Charge Selector Configuration** list to configure charge selector.

List Item	Description
Remove Charge Selector	Click to remove a charge selector.
Proration Settings	Click to open the Proration Settings dialog box.

Related Tasks

Adding an Existing Charge Selector

Adding a New Charge

Adding an Existing Charge

Proration Settings Dialog Box

Use the **Proration Settings** dialog box to specify how charges should be handled if the charge selector is purchased or canceled in the middle of a customer's billing cycle.

> **Note**
>
> Proration settings are applicable to all charges in the charge selector.

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List Item	Description
When purchased mid-cycle	Select how to apply charges when it is purchased in the middle of a customer's billing cycle: • **Prorate**: Calculate the charge based on the amount used. • **Full Charge**: Apply the entire charge. • **No Charge**: Do not apply the charge.
When cancelled mid-cycle	Select how to apply charges it is canceled in the middle of a customer's billing cycle: • **Prorate**: Calculate the charge based on the amount used. • **Full Charge**: Charge for the entire cycle. • **No Charge**: Do not charge for the cycle.

Related Tasks

Adding an Existing Charge Selector

Adding a New Charge

Adding an Existing Charge

Used By Button

Click this button to display a hierarchical view of all components that use this charge.

Charge Actions List

Use the **Charge Actions** list to perform charge-related tasks.

List Item	Description
New Date Range	Select this item to add a date range to the charge.
Manage Date Range	Select this item to add, edit, or delete a date range.
Charge Details	Select this item to display and edit details about the charge.
Remove Charge	Select this item to remove the charge from the charge offer.

Related Tasks

Adding Date Ranges to a Charge

Editing Charge Details

Removing a Charge from a Charge Offer

Charges Tree

Use the Charges tree to add a hierarchy of pricing components to the charge. The contents of the lists in the Charges tree toolbar depend on the profile associated with a charge.

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List	Description
Pricing Actions	This list is available when a pricing node is selected in the tree. It contains the following item: • **Rename Pricing:** Changes the name of the pricing. In addition, the following options appear if you have a single charge tree with multiple RUMs: • **Add Price Tier:** Adds the price tiers for the applicable RUMs that are configured in the charge. • **Remove Price Tier:** Removes the price tiers for the applicable RUMS that are configured in the charge.
Insert	This list is available when a node can be added between the selected node and its current child. The items in the list depend on the type of node that is selected. Selecting an item from the list adds it to the charge as a child of the selected node and as a parent of the node's current child.
Add	This list is available when a child node can be added to the selected node. The items in the list depend on the type of node that is selected. Selecting an item from the list adds it to the charge as a child of the selected node.

Related Tasks

Adding Impact Categories to a Charge

Adding Time Periods to a Charge

Adding a Price Selector to a Charge

Adding Pricing to a Charge

Adding a Price Override to a Charge

Renaming Charge Pricing

Adding Price Tiers

Removing Price Tiers

Pricing Details Section

Use the Pricing Details section to configure pricing for a charge.

> **Note**
>
> The pricing features displayed in PDC are determined by the pricing profile that you associate with the charge. Not all features described in this section are supported by all pricing profiles.

See "Pricing Table" for information about the pricing table.

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Field	Description
Price tier tabs	If a charge uses more than one RUM, a tab appears in the pricing for each RUM. These tabs are called price tiers.
Prices Effective	This list contains the pricing's effect periods, which are used to change the pricing on a future date. If the pricing contains only the default effective period, this list is not displayed.
Quantity Range	This list contains the pricing's quantity ranges, which are used to change the pricing based on the level of usage or frequency of occurrence.
Add Quantity Range 	Use to add a quantity range to pricing.
Reorder Balance Element Quantity Ranges 	Use to change the order in which granted allowances, such as free minutes and tokens, are consumed.
Delete 	Use to delete a quantity range, balance impact, or counter.
Edit Quantity Range Properties 	Use to edit universal quantity range properties.
Change Price 	Use to create pricing effective periods and to specify the scope of the pricing change.
Minimum Charges 	Use to set a minimum charge for the balance elements in pricing.

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Field	Description
Add Balance Impact 	Use to add a balance impact to pricing.
Add Counter 	Use to add a counter to pricing.
Price Tag 	Use to add a pricing tag to pricing.
Pricing table	Use to configure balance impacts and counters.

Related Tasks

Adding Pricing to a Charge

Renaming Charge Pricing

Adding Effective Periods to Charge Pricing

Adding Quantity Ranges to Charge Pricing

Changing the Order that Granted Allowances Are Consumed

Adding Price Tags to Usage Charges

Specifying a Minimum Charge

Adding Balance Impacts to Charges

Configuring Counters for Charges

Pricing Table

Use the pricing table in the Pricing Details section to configure balance impacts and counters for a charge.

To display the pricing table, select a pricing node in the Charges tree. If the Charges tree does not contain a pricing node, you cannot display the pricing table.

Each row in the table represents a balance impact for the event associated with the charge. See "Configuring Balance Impacts for Charges" for more information.

Depending on the charge type and profile associated with a charge, only a subset of the columns in the pricing table might appear.

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Column	Description
Impact	Select the type of impact represented by the row. This can be a debit or credit.
Condition	For conditional balance impacts, specify when the balance impact should be applied. Click the link in this column to select options in the Balance Impact Condition dialog box. The following options are available: • **Apply balance impact:** Select this value to specify the period for applying the balance impact, such as once every 1 hour or once every 2 days. • **Period Start Time:** Select one of the following: – **Start of Calendar Period.** The period is effective from the start of a calendar day. – **Event Occurrence.** The period is effective from the time the event occurs. – **Aligned with Offer Start Time.** The period is effective from the start time of the associated charge offer.
Amount	Specify the amount of debit or credit.
Balance Element	Select the currency or noncurrency balance element.
Per Unit	Select the type of unit, such as **Minute** or **Byte**, to which the charge applies. The selected unit should be related to the RUM associated with the charge. For example, if the RUM is Duration and the units specified in the RUM are seconds, select a unit that can be converted to seconds, such as **Minute**. The following values apply to all RUMs: • **Amount Used:** Select this value to apply the charge to the amount of any RUM unit used to measure usage, such as minutes or bytes. (Alternatively, you can select the actual unit.) • **Fixed Charge:** Select this value to charge a flat fee for the event. Fixed charges are unaffected by the quantity of the event. You can use this for fixed one-time, recurring, and usage charges. These charges are typically used for purchase and cancellation fees. When the RUM is of type **Conditional**, **Fixed Charge** is selected by default.

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Column	Description
Increment	Enter the number of units to which the charge applies. For example, for a mobile phone service, you might charge 0.40 US dollars for every minute of usage in 2-minute increments. In this example: • **Amount** is **0.40**. • **Balance Element** is **US dollars**. • **Per Unit** is **Minute**. • **Increment** is **2**. Select a rounding option. Rounding is based on the specified increment. For example, if a 3-minute-and-50-second call is rated in 2-minute increments, it is handled as follows: • **No Rounding:** Not applicable. (Applies only to an increment of 1.) • **Round Down:** Charge for 2 minutes ($0.80). • **Round Up:** Charge for 4 minutes ($1.60).
Amount Is Valid	When a balance impact is a credit of a noncurrency balance element or an increase of a counter, specify the period when the balance is available for consumption by setting its validity period. Click the link in this column to select values in the Amount Is Valid dialog box. See "Amount Is Valid Dialog Box" for details. For debit balance impacts, this field is not applicable.
GLID	Select the G/L ID assigned to the charge event. Some target engines require G/L IDs. If you do not provide a G/L ID for such engines, you will receive a validation error when you submit the charge.
Proration	Select the **Do not prorate** check box to prevent the proration settings in a charge from applying to a particular balance impact. This column applies only to recurring charges.
Discounting	Select the **Do not discount** check box in this column to make a balance impact nondiscountable. By default, balance impacts are discountable. This option is available only when the charge pricing profile is associated with the BRM real-time rating target engine profile. When a charge type is discounted in a bundle, the discount applies to all instances of the charge type that are discountable. For example, you might have a charge offer that charges for two cycle events. You charge a monthly fee for one event, and you grant included minutes for the other event. If you specify a percentage discount for cycle charges in the bundle, the discount applies to both cycle charges. To discount only the monthly fee, you must make the balance impact for the monthly fee discountable and the balance impact that grants included minutes nondiscountable.

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Column	Description
Apply Taxes	Select when to tax the charge: • **After Computing Charge**: Taxes are applied to the charge as soon as the charge is computed. • **At Billing**: Taxes are applied to the charge when the customer's bill is generated. • **At Billing, Use Event Time**: Taxes are applied to the charge when the customer's bill is generated, but taxes are calculated using the tax rate at the time the event occurred. • **Never**: The charge is not taxed.
Tax Code	Select the name of the tax code to apply.

Related Tasks

Configuring Balance Impacts for Charges

Configuring Conditional Balance Impacts

Amount Is Valid Dialog Box

Use the Amount Is Valid dialog box to select the validity period for the credited amount in the balance impact.

Use the list on the left to select the validity start time. The list includes the following options:

- **Always**: The amount is always valid.
- **From Event Occurrence**: The amount is valid from the occurrence of the event associated with the balance impact.
- **From First Usage**: The amount is valid from the first time it is impacted by a subscriber's usage.
- **From Specific Date**: The amount is valid from the date that you specify.
- **Relative to Event Occurrence**: The amount is valid relative to the occurrence of the event associated with the balance impact. Enter the number of accounting cycles, billing cycles, months, days, hours, minutes, recurring cycle, or seconds from the event occurrence.

  For example, if you specify two accounting cycles, the amount will be valid after two accounting cycles from when the event occurs.
- **From Period Start**: The amount is valid from the start of the balance impact period.

Use the list on the right to select the validity end time (when the amount can no longer be used). The list includes the following options:

- **No End Date**: The amount validity does not end.
- **End Relative to Validity Start**: The amount validity ends relative to the validity start time. Enter the number of accounting cycles, billing cycles, months, days, calendar days, hours, minutes, or seconds from the validity start time when the validity ends.

  For example, if you specify five days, the amount will not be valid after five days from the validity start time. If you specify one calendar day, the amount will not be valid after midnight (which is 12:00 AM) of the same day.

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> **Note**
>
> You can use calendar days only for charges with the Convergent Usage pricing profile.

- **Until Specific Time After Period Start**: The amount validity ends the specified number of hours, days, weeks, or so on after the start of the balance impact period.
- **Until Specific Date**: The amount validity ends on the date that you specify.

The following fields are displayed only for recurring and one-time charges, and only if you selected **Until Specific Date** for the validity end date.

Field	Description
Distribute Credit	Select how to distribute the noncurrency resources: • **All at once:** The minutes, Gigabytes, or so on are granted to the customer in one lump sum at the beginning of the validity period. This is the default. If you select this option, the subsequent fields are not displayed. • **Periodically over a fixed period:** The minutes, Gigabytes, or so on are split into multiple buckets, which are distributed incrementally over multiple validity periods. For example, a grant of 5 Gigabytes could be distributed in 1 Gigabyte buckets every hour.
Frequency and **Period**	Select how often to distribute a new bucket of noncurrency resources, such as every 2 hours or every 3 days.
Unused Credit Valid Until	Select when the incremental bucket of noncurrency resources expire: • **The end of the periodic distribution period:** Each bucket of noncurrency resources expires at the end of its incremental validity period. • **The end of the overall validity period:** All of the noncurrency resources expire at the end of the total validity period.

Related Tasks

Adding Multiple Validity Periods to Noncurrency Balance Impacts

Rollover Rules Section

Use the Rollover Rules section to configure rollover charges.

Field	Description
Balance Impact Validity	Specify the period in which the rollover is valid. For the start date, either select **Immediately** or enter a date and time in the **Start** field. For the end date, either select **Never** or enter a date and time in the **End** field.

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Field	Description
Table	Use this table to configure the rollover balance impact. It contains the following columns: • **Balance Element:** Select the balance element to roll over. • **GLID:** Select the G/L ID for the rollover balance impact. Some target engines require G/L IDs. If you do not provide a G/L ID for such engines, you will receive a validation error when you submit the charge. • **Rollover Units of Measure:** Select the units for the cycle to which the rollover applies. For example, if you select **Months**, the rollover applies only to balances granted by a monthly cycle. • **Maximum Number of Rollover Cycles:** Enter the maximum number of cycles that the balance can be rolled over. • **Maximum Rollover Amount per Cycle:** Enter the maximum amount of the unused balance that can be rolled over each cycle. (The remaining unused balance is lost.) • **Maximum Cumulative Rollover Total:** Enter the maximum value for a rollover balance.

Related Tasks

Adding Charges to a Charge Offer

Price Override Section

Use the Price Override section to configure a replacement price for a charge.

Table Column	Description
Impact to Original Price	Select the manner in which to override the original price: • **Percentage Adjustment:** Increases the price by a specified percentage. For example, if you enter 10% and the original price is $10, the override price is $11. • **Fixed Adjustment:** Increases or decreases the price by a specified amount. • **Replace:** Replaces the original price with a specified amount.
Amount	Enter the percentage or the amount of the adjustment or replacement. To increase or decrease the original price by a fixed amount, enter a positive or negative number.
Balance Element	Select the balance element affected by the price override.
Measured By	Select the RUMs to use in the price override. RUMs specify the units used to measure an event and how to calculate the measurement. The pricing profile determine which RUMs are available for selection. This column is not applicable if you have created multiple charge trees for multiple RUMs.
GLID	Select the G/L ID for this balance impact. Some target engines require G/L IDs. If you do not provide a G/L ID for such engines, you will receive a validation error when you submit the charge.

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Related Tasks

Setting Up Pricing for a Charge

Price Tag Dialog Box

Use the Price Tag dialog box to apply price tags to pricing components.

Field	Description
Price tag for	Select one of the following attributes to override the value at run time: • **Amount:** Overrides the amount at run time. • **Increment:** Overrides the number of units to which the charge or discount applies.
Name	Select a price tag from the list. Only the price tags that are valid for the selected pricing component are shown. **Tip**: Select **Not Set** to clear the price tag.
Description	Enter a description for the price tag.
Scope	Displays **Event Profile** by default.

Related Tasks

Adding Price Tags to Usage Charges

RUM Details Dialog Box

Use the RUM Details dialog box to set the rounding rules for the RUM.

Field	Description
RUM Name	Displays the RUM name.
Round	Select how the event quantity is rounded, enter the rounding increment, and select the units to measure the quantity. • Rounding mode **Up**: If there is an additional digit, the last significant digit is always rounded up. For example, if rounding is set to two significant digits, 1.151 rounds to 1.16. **Down**: If there is an additional digit, the last significant digit always remains the same. For example, if rounding is set to two significant digits, 1.159 rounds to 1.15. **To the Nearest**: If the additional digit is 0 through 4, the last significant digit remains the same. If the additional digit is 5 through 9, the last significant digit is rounded up. For example, 1.151 rounds to 1.15, and 1.159 rounds to 1.16. • Rounding increment units For example, if a phone call lasts 10 minutes and 47 seconds and you specify to round up in 5-second increments, the duration of the call event is recorded as 10 minutes and 50 seconds. • Rounding measurement unit Select the units to measure the quantity.

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Field	Description
Minimum Quantity	Enter the minimum quantity of the event that results in a fee, and select the units to measure it. If the quantity is less than the minimum, it is rounded up to the minimum regardless of the specified rounding mode. If the minimum quantity is 0 and the event quantity is less than 0, no rounding occurs.

Create Charge Dialog Box

Use the Create Charge dialog box to add a new charge to a charge offer.

For information about the subsections in this dialog box, see the following:

- Taxation Section
- Advanced Section
- Cycle Settings Section for Recurring Charges
- Proration Section for Rollovers

Field	Description
Charge Category	Select the event category to which the charge applies. See "About Charge Categories" for descriptions of the categories. The charge category determines which fields are displayed in this dialog box.
Charge Type	Select the type of event to which the charge applies. The list of event types is determined by the service to which the charge offer applies and the charge category.
Pricing Profile	Select a pricing profile for the charge. The pricing profile determines which features are supported for the charge. The selected charge category and charge type determine which profiles are available for selection.
Measured By	Select the RUMs to use in the charge. RUMs specify the units used to measure an event and how to calculate the measurement. (Offline Usage pricing profiles only) In a charge, the pricing for each RUM is contained in a *price tier*. If you add multiple RUMs to a charge, each tier appears in a subtab in the Pricing Details section of the charge tab. (Online Usage and Convergent Usage pricing profiles only) If you add multiple RUMs to a charge, each tier appears in a subtab in the charge tab. Select a RUM of type **Conditional** to configure conditional balance impacts. **Note:** Available RUMs for each service-event combination are configured in the service-event map.

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Field	Description
Using same pricing rule for all RUMs	(Online Usage and Convergent Usage pricing profiles only) Select this option to create a single charge tree for multiple RUMs. Each tier appears in a subtab in the Pricing Details section of the charge tab. This option enables you to quickly publish the charge to ECE. If you do not select this option, multiple charge trees are created for multiple RUMs, each representing the charge for a different RUM. Each charge tree appears in a subtab in the charge tab.
Name	(Optional) Enter a unique name. If you do not specify a name, PDC automatically generates a name in the following format: CHG *MMDDYY* : *HHMMSS* : *randomNumber* *CHG* identifies that the component is a charge.
Stop Charging	Indicate whether to stop charging accounts when they have an **Inactive** status, **Cancelled** status, or **SuspendedActive** life cycle state: • **Never**: Charges continue to be applied to accounts that have an Inactive status, Cancelled status, or Suspended Active state. • **When Cancelled**: Charges are not applied to cancelled accounts. • **When Inactive**: Charges are not applied to inactive accounts. • **When Life Cycle State Suspended_Active**: Charges are not applied to accounts that are set to the **SuspendedActive** custom life cycle state. By default, stop charging is selected for **Inactive** status, **Cancelled** status, and **SuspendedActive** state.
Currency	By default, the system currency appears in this field. To use a different currency for the charge, select the currency. The selected currency is the only currency balance element that you can use when configuring balance impacts for the charge.
Use extended pricing features for this charge	Select this option to create a *complex charge* that includes extended pricing features, such as impact categories, time periods, and price overrides. Initially, the charge contains no pricing and an empty Charges tree. One-time, recurring, usage, and remittance charges support extended pricing features. If you do not select this option, the charge initially contains one pricing instance. The pricing table is displayed, and the Charges tree is hidden. This enables you to quickly configure pricing for a *simple charge*.

Related Tasks

Adding Charges to a Charge Offer

Taxation Section

Use the Taxation section to specify tax information for the charge.

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Field	Description
Apply Taxes	Select when to tax the charge: • **After Computing Charge:** Taxes are applied to the charge as soon as the charge is computed. • **At Billing:** Taxes are applied to the charge when the customer's bill is generated. • **At Billing, Use Event Time:** Taxes are applied to the charge when the customer's bill is generated, but taxes are calculated using the tax rate at the time the event occurred. • **Never:** The charge is not taxed.
Option	Specifies how to apply taxes: • **Use Tax Code**: Applies the specified tax code. • **Use Tax Selector**: Applies the specified tax selector.
Tax Code or **Tax Selector**	Specifies the name of the tax code or tax selector to apply. **Note**: If the charge pricing profile is associated with the BRM real-time rating target engine profile, this tax code overrides the tax code configured in the billing system for the charge.

Related Tasks

Adding Charges to a Charge Offer

Advanced Section

Use the Advanced section to specify settings for processing events. These settings apply only to usage charges.

Field	Description
Time zone used to rate this event	Select the time zone to use to rate the event: • **From Account:** Uses the time zone in which the account is registered. • **From Event:** Uses the time zone in which the event occurs. For example, if you make a call from California and your account is registered in New York: • If you select **From Account**, New York time is used. • If you select **From Event**, California time is used.
When an event crosses multiple time periods, charge using	Select the way to charge for an event if it is priced differently by time period: • **Start Time:** Applies the charges defined in the time period in which the event begins. • **End Time:** Applies the charges defined in the time period in which the event ends. • **Split:** Applies charges according to the time period in which each portion of the event falls.

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Field	Description
Quantity used to select steps is	Select the way a price step is selected when part of the event was already charged in another time period: • **Dependent On:** Dependent on the quantity already used. When selecting a price step, PDC considers the amount of the event that occurred in the previous time period. • **Independent Of:** Independent of the quantity already used. When selecting a price step, PDC does not consider the amount of the event that occurred in the previous time period. For example, a phone call starts at 6 p.m. and ends at 10 p.m. The two hours between 6 p.m. and 8 p.m. are rated by the peak hours rate. The two hours between 8 p.m. and 10 p.m. are rated by the off-peak hours rate. The off-peak rate includes the following price steps: • For the first two hours, charge $0.10 per minute. • For all subsequent hours, charge $0.05 per minute. If the selection quantity is **Dependent On**, the quantity already used, the peak hours are considered the first two hours, and the off-peak portion of the call is charged $0.05 per minute. If the selection quantity is **Independent Of**, the quantity already used, the peak hours are *not* considered the first two hours, and the off-peak portion of the call is charged $0.10 per minute. This field is available only when charges from multiple time periods are used to rate an event.

Related Tasks

Adding Charges to a Charge Offer

Cycle Settings Section for Recurring Charges

Use the Cycle Settings section to specify settings for recurring charges.

Field	Description
In-Advance Billing	Select a billing option for a recurring charge: • **Don't bill in advance:** Customers are charged only for the current billing cycle and the next billing cycle. For example, if a customer purchases an offer on May 1 and the offer's $10 monthly fee is not billed in advance, the total charge in the customer's first bill is $20. The total charge in the next (June) bill is $10, but from an accounting perspective, the $10 fee applies to July, not to June. • **Charge cycle fees:** Customers are charged for the current billing cycle and the next billing cycle plus a specified number of days or months. For example, if a customer purchases an offer on May 1 and the offer's $10 monthly fee is billed three months in advance, the total charge in the customer's first bill is $30. The total charge in the next (June) bill is $10, but from an accounting perspective, the $10 fee applies to August, not to June. **Note:** In-advance billing is supported only for cycle forward events, not cycle arrears or cycle forward arrears events.

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Field	Description
Cycle Alignment	Select how to apply recurring charges: • **Alignment with billing:** Charge is applied on the customer's current billing date. For example, if the billing date is the 1st of the month and the charge offer is purchased on January 10, the charge is prorated and applied on January 10 for the interval January 10 to February 1. For subsequent cycles, the charge is applied on the billing date (for the interval February 1 to March 1, March 1 to April 1, and so on). • **Alignment with purchase:** Charge is applied on the product purchase date. Using the previous example, the charge is applied on the 10th of every month (for the interval January 10 to February 10, February 10 to March 10, and so on).
Proration When purchased mid-cycle	Select one of the following to specify how to handle a recurring charge when customers purchase an offer in the middle of their billing cycle: • **Prorate:** Calculate the charge based on the amount used. • **Full Charge:** Charge for the entire cycle. • **No Charge:** Do not charge for the cycle.
Proration When cancelled mid-cycle	Select one of the following to specify how to handle a recurring charge when customers cancel an offer in the middle of their billing cycle: • **Prorate:** Calculate the charge based on the amount used. • **Full Charge:** Charge for the entire cycle. • **No Charge:** Do not charge for the cycle.
Proration When the cycle changes	Select one of the following to specify how to handle a recurring charge when customers change their billing day of month (DOM) in the middle of their billing cycle: • **Prorate:** Calculate the charge based on the amount used. • **Full Charge:** Charge for the entire cycle. • **No Charge:** Do not charge for the cycle.

Related Tasks

Adding Charges to a Charge Offer

Proration Section for Rollovers

Use the Proration section to specify settings for rollover charges.

Field	Description
When purchased mid-cycle	Select one of the following to specify how to handle a rollover charge when customers purchase an offer in the middle of their billing cycle: • **Prorate:** Calculate the amount to roll over based on the percentage of the cycle for which the customer owned the charge offer. • **Full Charge:** Roll over the entire balance available for the cycle. • **No Charge:** Do not roll over any of the available balance.

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Field	Description
When cancelled mid-cycle	Select one of the following to specify how to handle a rollover charge when customers cancel an offer in the middle of their billing cycle: • **Prorate:** Calculate the amount to roll over based on the percentage of the cycle for which the customer owned the charge offer. • **Full Charge:** Roll over the entire balance available for the cycle. • **No Charge:** Do not roll over any of the available balance.

Related Tasks

Adding Charges to a Charge Offer

Search for Charges Dialog Box

Use the Search for Charges dialog box to find an existing charge to add to a charge offer or a charge selector.

Field	Description
Pricing Component	(Charge selector) Specifies that you are searching for a charge.
Applicable To	Displays the Applicable To setting for the charge offer or charge selector, either a service or **Account**.
Charge Type	(Charge offer) Select the type of event to which the charge applies or **Any**. Select **Unassigned** to find charges without a service. (Charge Selector) Displays the type of event to which the charge selector applies.
Pricing Profile	(Charge offer) Select the pricing profile associated with the charge or **Any**. (Charge selector) Displays the pricing profile associated with the charge selector.
Measured By	(Charge offer) Select the RUMs used by the charge or **Any**. The charge type and pricing profile determine which RUMs are available for selection. **Any** is not available for profiles that support multiple RUMs. (Charge selector) Displays the RUMs associated with the charge selector.
Name	Select a name operator and then enter a value in the field next to the operator to narrow the search. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Related Topics

Searching for Pricing Components

Results Table

The Results table lists the charges that meet the search criteria. Select the charge to add to the charge offer, and click **OK**.

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Column	Description
Name	Displays the name of the charges that meet the search criteria.
Description	Displays a description of each charge.
Phase	Displays the status of each charge: • **Draft:** The charge belongs to one of your unsubmitted changesets. Only you have access to it. • **Promoted:** The charge belongs to a submitted changeset. All PDC users have access to it. If the search finds both a promoted version and a draft version of a charge in the PDC database, it returns the draft version.
Applicable To	Displays the Applicable To setting for the charge, either a service or **Account**.
Charge Type	Displays the type of event to which the charge applies.

Related Tasks

Adding an Existing Charge

Search for Charge Selectors Dialog Box

Use the Search for Charge Selectors dialog box to find a charge selector to add to a charge offer.

Field	Description
Applicable To	Displays the Applicable To setting for the charge selector, either a service or **Account**.
Event	Select the type of event to which the charge applies or **Any**.
Pricing Profile	Select the pricing profile associated with the charge or **Any**.
Name	Select a name operator and then enter a value in the field next to the operator to narrow the search. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the charge selectors that meet the search criteria. Select the charge selector to add to the charge offer, and click **OK**.

Column	Description
Name	Displays the charge selectors that meet the search criteria.
Description	Displays a description of each charge selector.
Phase	Displays the status of the charge selectors: • **Draft:** The charge selector belongs to one of your unsubmitted changesets. Only you have access to it. • **Promoted:** The charge selector belongs to a submitted changeset. All PDC users have access to it. If the search finds both a promoted version and a draft version of a charge selector in the PDC database, it returns the draft version.

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Column	Description
Applicable To	Displays the Applicable To setting for the charge selector, either a service or **Account**.
Event	Displays the type of event to which the charge selector applies.

Related Tasks

Adding an Existing Charge Selector

Related Topics

Searching for Pricing Components

Charge Details Dialog Box

Use the Charge Details dialog box to view and edit settings in a charge.

The mode of this dialog box (read-only or edit) matches the mode of the charge from which it is opened.

For information about the subsections in this dialog box, see the following:

- Taxation Section
- Advanced Section
- Cycle Settings Section

Field	Description
Charge Category	Displays the category of event to which the charge applies. See "About Charge Categories" for descriptions of the categories.
Charge Type	Displays the type of event to which the charge applies. The available event types are determined by the service to which the charge offer applies and the charge category.
Pricing Profile	Displays the pricing profile for the charge. The pricing profile determines which features are supported for the charge.
Measured By	Displays the RUMs used in the charge. RUMs specify the units used to measure an event and how to calculate the measurement. In a charge, the pricing for each RUM is contained in a *price tier*. If a charge uses multiple RUMs, each tier appears in a subtab in the Pricing Details section of the charge tab.
Using same pricing rule for all RUMs	When selected, a Single Rum Graph will be created for all RUMs.
Name	Displays the name of the charge. If a default name was generated for the charge, it has the following format: CHG *MMDDYY* : *HHMMSS* : *randomNumber* *CHG* identifies that the component is a charge.

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Field	Description
Stop Charging	Indicates whether to stop charging accounts when they have an **Inactive** status, **Cancelled** status, or **SuspendedActive** state: • **Never**: Charges continue to be applied to accounts that have an Inactive status, Cancelled status, or Suspended Active state. • **When Cancelled**: Charges are not applied to cancelled accounts. • **When Inactive**: Charges are not applied to inactive accounts. • **When Life Cycle State Suspended_Active**: Charges are not applied to accounts that are set to the **SuspendedActive** custom life cycle state. The value of this field can vary for each charge offer where the charge is used. You can edit this field only from the charge offer that contains the charge. See "Editing Charge Details" for more information.
Currency	Displays the only currency balance element that you can use when configuring balance impacts for the charge.

Related Tasks

Editing Charge Details

Taxation Section

Use the Taxation section to view and edit charge taxation settings.

Field	Description
Apply Taxes	Specifies when the charge is taxed: • **After Computing Charge**: Taxes are applied to the charge as soon as the charge is computed. • **At Billing**: Taxes are applied to the charge when the customer's bill is generated. • **At Billing, Use Event Time**: Taxes are applied to the charge when the customer's bill is generated, but taxes are calculated using the tax rate at the time the event occurred. • **Never**: The charge is not taxed.
Option	Specifies how to apply taxes: • **No Tax**: Does not apply taxes. • **Use Tax Code**: Applies the specified tax code. • **Use Tax Selector**: Applies the specified tax selector.
Tax Code or **Tax Selector**	Specifies the name of the tax code or tax selector to apply.

Related Tasks

Editing Charge Details

Advanced Section

Use the Advanced section to view settings for processing events. These settings apply only to usage charges.

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Field	Description
Time zone used to rate this event	Displays the time zone to use to rate the event: • **From Account:** Uses the time zone in which the account is registered. • **From Event:** Uses the time zone in which the event occurs. For example, if you make a call from California and your account is registered in New York: • If you select **From Account**, New York time is used. • If you select **From Event**, California time is used. The value of this field can vary for each charge offer where the charge is used. You can edit this field only from the charge offer that contains the charge. See "Editing Charge Details" for more information.
When an event crosses multiple time periods, charge using	Displays the way an event is charged if it is priced differently by time period: • **Start Time:** Applies the charges defined in the time period in which the event begins. • **End Time:** Applies the charges defined in the time period in which the event ends. • **Split:** Applies charges according to the time period in which each portion of the event falls.
Quantity used to select steps is	Displays the way a price step is selected when part of the event was already charged in another time period: • **Dependent On:** Dependent on the quantity already used. When selecting a price step, PDC considers the amount of the event that occurred in the previous time period. • **Independent Of:** Independent of the quantity already used. When selecting a price step, PDC does not consider the amount of the event that occurred in the previous time period. For example, a phone call starts at 6 p.m. and ends at 10 p.m. The two hours between 6 p.m. and 8 p.m. are rated by the peak hours rate. The two hours between 8 p.m. and 10 p.m. are rated by the off-peak hours rate. The off-peak rate includes the following price steps: • For the first two hours, charge $0.10 per minute. • For all subsequent hours, charge $0.05 per minute. If the selection quantity is **Dependent On**, the quantity already used, the peak hours are considered the first two hours, and the off-peak portion of the call is charged $0.05 per minute. If the selection quantity is **Independent Of**, the quantity already used, the peak hours are *not* considered the first two hours, and the off-peak portion of the call is charged $0.10 per minute. This field is applicable only when charges from multiple time periods are used to rate an event.

Related Tasks

Editing Charge Details

Cycle Settings Section

Use the Cycle Settings section to view and edit settings for recurring and rollover charges.

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Field	Description
In-Advance Billing	Displays a billing option for a recurring charge: • **Don't bill in advance:** Customers are charged only for the current billing cycle and the next billing cycle. For example, if a customer purchases an offer on May 1 and the offer's $10 monthly fee is not billed in advance, the total charge in the customer's first bill is $20. The total charge in the next (June) bill is $10, but from an accounting perspective, the $10 fee applies to July, not to June. • **Charge cycle fees:** Customers are charged for the current billing cycle and the next billing cycle plus a specified number of days or months. For example, if a customer purchases an offer on May 1 and the offer's $10 monthly fee is billed three months in advance, the total charge in the customer's first bill is $30. The total charge in the next (June) bill is $10, but from an accounting perspective, the $10 fee applies to August, not to June.
Cycle Alignment	Displays how to apply recurring charges: • **Alignment with billing:** Charge is applied on the customer's current billing date. For example, if the billing date is the 1st of the month and the charge offer is purchased on January 10, the charge is prorated and applied on January 10 for the interval January 10 to February 1. For subsequent cycles, the charge is applied on the billing date (for the interval February 1 to March 1, March 1 to April 1, and so on). • **Alignment with purchase:** Charge is applied on the product purchase date. Using the previous example, the charge is applied on the 10th of every month (for the interval January 10 to February 10, February 10 to March 10, and so on).
Proration	**For recurring charges:** Displays how to handle a recurring charge when customers purchase an offer, cancel an offer, or change their billing day of month (DOM) in the middle of their billing cycle: • **Prorate:** Calculate the charge based on the amount used. • **Full Charge:** Charge for the entire cycle. • **No Charge:** Do not charge for the cycle. For recurring charges, the value of this field can vary for each charge offer where the charge is used. You can edit this field only from the charge offer that contains the charge. See "Editing Charge Details" for more information. **For rollovers:** Displays how to handle rollovers when customers purchase or cancel the offer in the middle of their billing cycle: • **Prorate:** Calculate the amount to roll over based on the percentage of the cycle that the customer owned the charge offer. • **Full Charge:** Roll over the entire balance available for the cycle. • **No Charge:** Do not roll over any of the available balance.

Related Tasks

Editing Charge Details

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Add Impact Categories Dialog Box

Use the Add Impact Categories dialog box to add zone impact categories to a charge.

Field	Description
Zone Model	Select the zone model that contains the impact categories you want to add.
USC Selector	(Optional) Select a Usage Scenario (USC) selector to filter the impact categories in the selected zone model based on attributes related to differentiated network services, such as mailbox inquiries, call forwarding, and friends-and-family discounts. **Note:** This field is mandatory if the Online Usage pricing profile is associated with the charge.
APN Selector	(Optional) Select an Access Point Name (APN) selector to filter the impact categories in the selected zone model based on attributes related to GPRS calls.
Select the Impact Categories to Add	Select the impact categories to add to the charge.
Impact Category Name Contains	Restrict the number of impact categories in the list by entering name criteria in this field and then clicking **Filter**.
Add Impact Categories As a Group	(Optional) Select this option to add all the selected impact categories to the same node in the Charges tree. If necessary, you can later move some or all of the grouped impact categories to individual nodes.

Related Tasks

Adding Impact Categories to a Charge

Related Topics

Creating Zone Models

USC Selectors

APN Selectors

Add Time Periods Dialog Box

Use the Add Time Periods dialog box to add time periods to a charge.

Field	Description
Time Model	Select a time model. Only time models associated with the same pricing profile as the charge are available.
Select Time Periods to Include in a Charge	Select time periods to add to the charge.
Add Time Periods As a Group	Click to add all the selected time periods to the same node in the Charges tree. If necessary, you can later move some or all of the grouped periods to individual nodes.

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Related Tasks

Adding Time Periods to a Charge

Add Generic Selector Dialog Box

Use the Add Generic Selector dialog box to add to a generic selector to a charge.

Field	Description
Generic Selector	Select the generic selector to add to the charge.
Generic Selector Results to Add	Select the generic selector results to add to the charge.
Add Generic Selector Results As a Group	(Optional) Select this option to add all the selected generic selector results to the same node in the Charges tree. If necessary, you can later move some or all of the grouped generic selector results to individual nodes.

Related Tasks

Adding a Generic Selector to a Charge

Related Topics

Grouping Components in a Charge

Ungrouping Components in a Charge

Search for Price Selectors Dialog Box

Use the Search for Price Selectors dialog box to find a price selector to add to a charge.

Field	Description
Pricing Component	Specifies that you are searching for a price selector.
Applicable To	Displays the Applicable To setting for the charge, either a service or **Account**.
Event	Displays the event to which the charge applies.
Pricing Profile	Displays the pricing profile associated with the charge.
Name	Select a name operator and then enter a value in the field next to the operator to narrow the search. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Related Topics

Searching for Pricing Components

Results Table

The Results table lists the price selectors that meet the search criteria. Select the price selector to add to the charge, and click **OK**.

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Field	Description
Name	Displays the price selectors that meet the search criteria.
Description	Displays a description of each price selector.
Phase	Displays the status of each price selector: • **Draft:** The price selector belongs to one of your unsubmitted changesets. Only you have access to it. • **Promoted:** The price selector belongs to a submitted changeset. All PDC users have access to it. If the search finds both a promoted version and a draft version of a price selector in the PDC database, it returns the draft version.
Applicable To	Displays the Applicable To setting for the price selector, either a service or *Account*.
Event	Displays the type of event to which the price selector applies.

Related Tasks

Searching for Pricing Components

Change Price Dialog Box

Use the Change Price dialog box to specify which components will be affected by a change and to add effective periods to pricing.

The available options depend on whether the dialog box is displayed from within a charge offer, a charge, a charge selector, or a price selector.

Field	Description
The Price Change Will Affect	Select one of the following options to indicate the scope of the price change: • **This charge wherever it is used:** Affects every component that uses the charge. • **The current offer only:** Affects only this charge offer. Other components that use the charge are not affected.
Change Price	Select one of the following options to specify when the price change takes effect: • **Use existing period:** The price change takes effect immediately. • **Effective on:** The price change becomes effective on a date you specify. If you enter a future date that is not the start date of an existing pricing effective period, PDC adds an effective date that starts on the date.

Related Tasks

Adding Effective Periods to Charge Pricing

Modifying Pricing without Inadvertently Affecting Other Components

Adding an Existing Charge

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Properties for All Quantity Ranges

Use the Properties for All Quantity Ranges dialog box to view and edit properties that apply to all quantity ranges and effective periods in a pricing instance.

> **Note**
>
> If a pricing instance contains multiple price tiers, this dialog box applies only to the current price tier.

The contents of this dialog box and whether you can edit or only view them depend on the pricing profile associated with the charge.

Field	Description
Charges in this tier are measured by	Specifies the RUM of the current price tier. This field is always read-only.
Quantity range selected based on	When this field is editable, you can change the basis of the quantity ranges in the current price tier by selecting one of the following items: • **Usage Quantity:** Quantity ranges are based on the amount of usage. • **Balance of:** Quantity ranges are based on the value of the specified balance element. Select the balance element in the list to the right of this field.

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Field	Description
When subscriber has insufficient credit	Select what to do if the cost of the balance element affected by the charge is greater than the customer's credit limit. A credit limit is the maximum amount of a balance element that can accumulate in a balance group. For more information, see "Setting Credit Limits" and "About Credit Limits" in *PDC Creating Product Offerings*. You can choose from the following options: • **Prorate service according to available balance**: The subscription succeeds and the resources are prorated according to the available balance. • **Use available balance, track remainder as negative account balance**: The subscription succeeds and all available balance is used. The remaining amount is recorded as an outstanding amount to be paid at the next top-up for prepaid customers or current bill for postpaid customers. • **Use available balance, grant loan for remainder**: The subscription succeeds. If the customer is eligible for a loan, all available balance is used and a loan is granted for the remaining amount. If the customer is not eligible for a loan, the subscription fails. See "About Loans" in *BRM Configuring and Collecting Payments* for more information about loans. • **Use available balance, track remainder as outstanding**: This option is intended for prepaid customers. The remaining amount is recorded as an outstanding amount to be paid at the next top-up for prepaid customers or current bill for postpaid customers. • **Do not use available balance, track entire amount as outstanding**: The subscription succeeds without using the available balance. The entire amount is recorded as an outstanding amount to be paid at the next top-up for prepaid customers or current bill for postpaid customers. • **Subscription fails**: The subscription fails. After a configured maximum number of retries, a notification event is sent to an external system for further processing. • **Skip subscription charges until next cycle**: The subscription succeeds without using the available balance. Billing will be skipped for this cycle; during rating all balance impacts are dropped and the unrated quantity is set to 0. The cycle forward date is moved to next cycle. • **Charge minimum configured amount**: The subscription succeeds if the customer's balance is at least a configured minimum amount. If they have enough balance for the full amount, the full amount is charged. If they have less than the full amount, but more than the minimum amount, the minimum amount is charged. If they have less than the minimum amount, the subscription fails. After a configured maximum number of retries, a notification event is sent to an external system for further processing. When you select this option, you can also configure the following: – **Minimum Amount**: Specify the minimum amount to be charged. When you select **Charge minimum configured amount** option, the values in Amount column in the Balance Element table becomes a link. Click this link to set the minimum amount. – **Prorate Quantity**: Specify whether or not to prorate the service according to the minimum amount configured. By

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Field	Description
	default, this is selected and the service will be prorated. Deselect this option to grant the full service for the minimum amount. • **Subscription fails and is canceled**: The subscription fails. After retrying the subscription the configured maximum number of times, a notification event is sent to an external system for further processing and the subscription is canceled. It will not automatically renew next cycle.
Charges based on	Displays one of the following, depending on the pricing profile associated with the charge that contains the pricing: • **Profiles associated with the real-time rating engine:** Shows the remaining event quantity. If the pricing contains multiple price tiers, each tier charges for the quantity that remains after the preceding price tier is applied. For example, a call lasts 10 minutes. The first tier deducts from the Bonus Minutes balance. The second tier deducts from the Anytime Minutes balance. If only 3 bonus minutes and 100 anytime minutes remain, 3 minutes of the call are covered by the first tier. The second tier is used to charge for the remaining 7 minutes, not for the original 10. • **Profiles associated with the batch rating engine:** Shows the original event quantity. Charges in every price tier are applied against the same original event quantity.

Related Tasks

Adding Quantity Ranges to Charge Pricing

Editing Quantity Range Properties

New Date Range Dialog Box

Use the New Date Range dialog box to add date ranges to a charge.

Field	Description
Type	Select the type of range to add: • **For Fixed Period:** Range starts and ends on particular dates. • **Relative to Purchase:** Range begins a specified number of days, hours, minutes, or seconds after the purchase time and continues for a specified number of days, hours, minutes, or seconds. The purchase date is the day the charge offer is added to the account.
Date Range Effective	(For fixed periods only) Enter the start date for the new range. PDC calculates the end date based on the existing date ranges.
Start	(For relative periods only) Specify the relative start time. To start the charge configured in this range when purchased, select **Immediately**. To start the charge at a later time, deselect **Immediately**, and enter the number of days, hours, minutes, or seconds after the purchase time that the range starts.

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Field	Description
End	(For relative periods only) Specify the relative end time. To keep the charge configured in this range effective forever, select **Never Ends**. To specify an end time, deselect **Never Ends**, and enter the number of days, hours, minutes, or seconds after the start time that the range ends.

Related Tasks

Adding Date Ranges to a Charge

Manage Date Ranges Dialog Box

Use the Manage Date Ranges dialog box to add, modify, and delete charge date ranges.

Click the **Add** icon to add a date range to the charge:



The New Date Range dialog box appears.

Related Tasks

Adding Date Ranges to a Charge

Modifying Date Ranges in a Charge

Edit Date Range Dialog Box

Use the Edit Date Range dialog box to modify the start and end times of charge date ranges.

Field	Description
Start	To start the charge configured in this range when purchased, select **Immediately**. To start the charge at a later time, deselect **Immediately**, and do one of the following: • (Fixed periods) Select a start date. • (Relative periods) Enter the number of days, hours, minutes, or seconds after the purchase time that the charge starts.
End	To keep the charge configured in this range effective forever, select **Never Ends**. To specify an end time, deselect **Never Ends**, and do one of the following: • (Fixed periods) Select an end date. • (Relative periods) Enter the number of days, hours, minutes, or seconds after the start time that the charge ends.

Related Tasks

Adding Date Ranges to a Charge

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Modifying Date Ranges in a Charge

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5

Discount Offers

A discount offer contains one or more discounts. A discount can do the following:

- Reduce the charges associated with billable events.
- Grant or consume noncurrency balance elements, such as included minutes or loyalty points.
- Track usage or spending by using a counter, enabling another discount to apply a percentage off based on the counter balance.

To apply discounts to charges, you group discount offers with charge offers, into bundles.

For overview information, see "Creating Discount Offers" in *PDC Creating Product Offerings*.

Related Topics

Charge Offers

Bundles

Creating a Discount Offer

To create a discount offer:

1. In the Pricing section of the navigation pane, under **Offers**, click **Create Discount Offer**. The **Create Discount Offer** page appears.
2. Enter general information. See "Specifying General Information for a Discount Offer" for more information.
3. Specify values for any product specification attributes configured in XML templates for discount offers. See "Specifying Product Specification Attribute Values" for more information.
4. Specify the discount offer settings. See "Specify Discount Offer Settings" for more information.
5. Add discounts. See "Adding Discounts to a Discount Offer" for more information.
6. Add rules for the discounts in the discount offer. See "Configuring Discount Rule" for more information.
7. Configure pricing for the discounts in the discount offer. See "Setting Up Pricing for a Discount" for more information.

Related Topics

Create Discount Offer Page Reference

Specifying General Information for a Discount Offer

To specify general information:

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1. In the General Information section, enter a unique name and a description for the discount offer.
2. From the **Type** list, select one of the following discount offer types:
   - **Subscription:** Contains discounts that apply only to the subscriber who owns the discount offer.
   - **System:** Contains discounts that apply to all subscribers who use a particular service.
3. From the **Applicable To** list, select the service for which you want to create the discount offer.

Related Topics

General Information Section

Creating a Discount Offer

Specifying Product Specification Attribute Values

If you have configured product specification attributes in an XML template file, you can specify values for them. The attributes and input types available depend on what is configured in the XML template file.

The values are validated against the XML template file. Any invalid values are highlighted and errors are displayed in a pop-up message.

See "About Product Specification Attributes for Pricing Components" in *PDC Creating Product Offerings* for more information.

Specify Discount Offer Settings

The settings in this section have default values, but you can change them.

To specify discount offer settings:

1. In the **Create Discount Offer** page, expand the Offer Settings section.
2. In the **Available for Purchase** group, specify the period during which customers can purchase the discount offer.
3. From the **Apply this discount to** list, select the option that determines how the discounts are applied to the charge.
4. Select a provisioning tag for the discount offer.

   Provisioning tags are used in Oracle Communications Billing and Revenue Management (BRM) to implement extended rating attributes (ERAs). See the BRM documentation for more information.
5. Enter the priority for the discount offer.

   The discount priority determines the order in which discount offers are evaluated. Zero is the lowest priority.
6. Specify whether the discount offer is shared with all members of a corporate sharing group when it is purchased by the group's owner.
7. In the **Ownership Rules** group, enter the quantity of the discount offer that a customer can purchase and own at one time.
8. Click the link in the **Discount Exclusion** field to specify the discount offers that cannot be used along with the current discount offer.

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The Discount Exclusion dialog box appears.

9. Click the **Add** icon.

   The Search for Discount Offers dialog box appears.

10. Search for the discount offers to add as exclusions.
11. In the Results table, select the discount offers and click **OK**.

    The discount offers are added to the table.

12. In the **Sharing** group, select **Tie Discount Offer with Charge Offer** to make the discount offer eligible for tying with specific charge offers.
13. Specify whether you want to round the validity for the discount offer.
14. Click **OK**.

Related Topics

Offer Settings Subsection

Search for Discount Offers Dialog Box

Creating a Discount Offer

Adding Discounts to a Discount Offer

A discount specifies how to calculate the discount for a charge. You can configure one or more discounts for events associated with the service to which the discount offer applies.

> **Note**
>
> The features of the discount offer that are displayed are determined by the pricing profile that you select for the discount. Not all the features described in the procedures may be supported by all pricing profiles.

You add discounts to a discount offer in the following ways:

- Configure a new discount. See "Adding a New Discount" for more information.
- Add an existing discount from another discount offer. See "Adding an Existing Discount" for more information.
- Add a prioritized list of preconfigured discounts to the discount offer. See "Adding a Discount Selector" for more information.

Related Topics

Discounts Section

Adding a New Discount

To add a new discount to the discount offer:

1. In the Discounts section, from the **Add Discount** list, select **Add New Discount**.

   The Create Discount dialog box appears.

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2. From the **Discount Category** list, select the type of event for which you want to create the discount.
3. From the **Discount Type** list, select the event for which you want to create the discount.

   The remaining fields in the dialog box are updated based on the discount type that is selected.
4. From the **Pricing Profile** list, select a pricing profile for the discount. The pricing profile determines the features available for the discount.
5. (Optional) Enter a unique name for the discount.
6. (Optional) From the **Stop Discounting** list, specify whether to apply the discount after it has been canceled or inactivated to events that occurred prior to the discount cancellation or inactivation.
7. (Optional) From the **Resources Consumption Order** list, specify whether to consume noncurrency resources for the discounts in order of earliest expiry, or in order of any discount rules configured. This option is only available for ECE enabled system.
8. (Optional) (Billing-time discounts only) Specify whether this is a snowball discount.
9. (Optional) In the Taxation section, do one of the following:
   - To not apply taxes to the discount: Select **No Tax** from the **Option** list.
   - To apply a specific tax code to the discount: Select **Use Tax Code** from the **Option** list, and then select the name of the tax code from the **Tax Code** list.
   - To use a tax selector to apply a tax code to the discount based on account, service, event, and profile attributes: Select **Use Tax Selector** from the **Option** list, and then select the name of the tax selector from the **Tax Selector** list.
10. (Optional) In the Validity section, select the discount validity settings.
11. Click **OK**.

    A tab for the discount is added to the Discounts section.

Related Topics

Create Discount Dialog Box

Adding Discounts to a Discount Offer

Adding an Existing Discount

To add an existing discount:

1. In the Discounts section, from the **Add Discount** list, select **Add Existing Discount**.

   The Search for Discounts dialog box appears.
2. Search for the existing discounts to add to the discount offer.
3. In the Results table, select the discounts and click **OK**.

   The Select Discount Type dialog box appears.
4. From the **Discount Type** list, select the event type for the discount.

   A tab for the discount is added to the Discounts section.

   To see a list of the other components that use this discount, click **Used By**. Any changes you make to the discount will affect the original discount and all the components that use it.

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Related Topics

Search for Discounts Dialog Box

Adding Discounts to a Discount Offer

Adding a Discount Selector

A discount selector consists of rules that associate event, service, and account attributes with discounts. You use a discount selector to determine which discount to apply to an event based on the attribute values.

To add a discount selector:

1. In the Discounts section of the **Create Discount Offer** tab, from the **Add Discount** list, select **Add Existing Discount Selector**.

   The Search for Discount Selectors dialog box appears.
2. Search for discount selectors.
3. In the search results, select the discount selector and click **OK**.

   A tab for the discount selector is added to the Discounts section of the discount offer.
4. (Optional) To edit the discount selector and its associated discounts, click the discount selector's name link in the top-left corner of the discount selector tab.

Related Topics

Search for Discount Selectors Dialog Box

Creating a Discount Selector

Adding Discounts to a Discount Offer

Configuring Discount Rule

A discount rule specifies how to calculate and apply a discount.

A discount can have one or more rules. If a discount has multiple rules, each rule appears in a subtab in the Discounts section. The sequence of the rules is important—they are run from left to right.

After adding a discount to the discount offer, perform the following tasks to configure one or more rules for the discount:

1. Specify how to apply the discount. See "Specifying How to Apply the Discount" for more information.
2. (Optional) Configure the discount filters. See "Configuring Discount Filters" for more information.
3. (Optional) Configure the discount triggers. See "Configuring Discount Triggers" for more information.
4. Configure pricing for the discount. See "Setting Up Pricing for a Discount" for more information.
5. (Optional) Add additional rules. See "Adding a New Discount Rule" for more information.

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Specifying How to Apply the Discount

By default, a discount rule applies discounts to the charge in the same way as the discount offer but you can change this setting as follows:

1. In the Rule Details section, from the **Apply this discount to** list, select how the discount is applied to the charge.
   - To apply the discount offer to the original charge amount, select **Original Charge**.
   - To apply the discount offer to the remaining charge amount after previous discount offers are applied, select **Remaining Charge**.
   - To apply the discount offer to the part of the charge and quantity that have not been used as the basis for a previous discount offer, select **Remaining Charge and Quantity**.

     This option is not valid for discount offers that credit a balance.

Related Topics

Rule Details Section

Configuring Discount Filters

A discount filter defines the parts of a charge that are subject to the discount. By default, charges that impact a currency balance are subject to the discount.

You can have multiple filters for a discount.

To configure a discount filter:

1. In the Rule Details section, click the link in the **Filter** field.

   The Filters section appears. The table in this section displays the filters currently used by the discount.
2. Do any of the following:
   - Add a new filter to the discount. See "Adding a New Filter" for more information.
   - Add an existing filter to the discount. See "Adding an Existing Filter" for more information.
   - Change the criteria for a filter. Click the filter name link and edit the fields in the Filter Details subsection.

Related Topics

Rule Details Section

Adding a New Filter

To add a new filter:

1. Click the **Add** icon.
2. In the Filter Details subsection, enter a name and description for the filter.
3. Set the values for the fields that you want to use to define the filter.

   You can enter regular expressions in the following fields:

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- **GLID**
- **Time Period**
- **Impact Category**
- **Usage Class**
- **Usage Type**
- **Service Class**
- **Pricing Name**

To match any value, use .* (dot asterisk) or leave the field empty. Do not use only an asterisk (*) in regular expressions.

You can enter multiple values separated by pipes (|) in the **GLID** field.

You can enter NOT (!) operator in the following fields:

- **GLID**
- **Time Period**
- **Impact Category**
- **Generic Selector Result**

> **Note**
>
> PDC does not validate the expressions entered in the fields.

4. Click **Save**.

   The filter is added to the table.

Related Topics

Filters Section

Adding an Existing Filter

To add an existing filter to the discount:

1. Click the **Search** icon.
2. In the Search for Filters dialog box, search for the discount filters to include in the discount.
3. In the Results table, select the filter and click **OK**.

Related Topics

Search for Triggers Dialog Box

Configuring Discount Triggers

A discount trigger enables you to set conditions that must be met before the discount is applied.

By default, a discount is always applied.

To configure a discount trigger:

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1. In the Rule Details section, click the link in the **Trigger** field.

   The Trigger section appears.
2. Do any of the following:
   - Add a new discount trigger. See "Adding a New Discount Trigger" for more information.
   - Search for an existing discount trigger to add to the discount. See "Adding an Existing Discount Trigger" for more information.

Related Topics

Trigger Section

Adding a New Discount Trigger

To add a new discount trigger:

1. In the Trigger section, click **New**.
2. Enter a unique name and description for the new trigger.
3. In the Trigger Details section, click the **Add** icon in the table.

   A row is added to the table.
4. In the **Expression** column, click the expression link.

   The Expression Builder dialog box appears.
5. From the **Expression Element** list, select an expression for the trigger condition.

   PDC prompts you for additional element information depending on the expression element that you select.

   You can add more elements to the expression by entering standard arithmetic operators, decimal constants, and other expressions in the **Expression** field.
6. Click **OK**.
7. From the **Operator** list, select an operator for the trigger condition.
8. In the **Value** column, enter a value for the trigger condition.

   Add additional elements to the trigger as needed.

Related Topics

Trigger Section

Expression Builder Dialog Box

Adding an Existing Discount Trigger

To add an existing discount trigger:

1. In the Trigger section, click **Search**.

   The Search for Triggers dialog box appears.
2. Search for triggers to add to the discount.
3. In the Results table, select the discount trigger, and click **OK**.

   The discount trigger information appears in the Trigger section.

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Related Topics

Search for Triggers Dialog Box

Adding a New Discount Rule

To add a new discount rule:

1. From the **Discount Actions** list, select **Add Rule**.
2. Select **Add Rule**.

   The rule is added as a subtab of the discount tab with default filter and trigger.

Renaming a Discount Rule

To rename a discount rule:

1. From the **Discounts Actions** list, select **Rule Actions**.
2. Select **Rename Rule**.

   The Change Rule Name dialog appears.
3. Enter the new name.
4. Click **OK**.

Reordering Discount Rules

To reorder a discount rule:

1. In the Pricing section of the navigation pane, click **Search Pricing**.
2. Click **Advanced**.

   The **Search** page appears.
3. Select **Discount Offer** from the Pricing Component list and click **Search**.
4. Select the required discount offer.

   The **Discount Offer** page appears.

   All available rules for the selected discount are displayed in the Rules tab as subtabs.
5. Click **Edit** to modify or reorder the rules.
6. In the Rule Details section, select a rule.
7. Drag and drop it to the desired location in the Rules tab or do the following:
   a. Click **Discount Actions**.
   b. Click **Rule Actions**.
   c. Click **Move Rule**.

      The **Move the Rule** dialog appears.
   d. From the **Move the rule before** list, select the desired location.
   e. Click **OK**.

   The rule is moved to the new location.
8. Click **Save**.

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9. Click **Save and Done**.

Related Topics

Create Discount Offer Page Reference

Configuring Discount Rule

Deleting a Discount Rule

To delete a discount rule:

1. From the **Discounts Actions** list, select **Rule Actions**.
2. Select **Remove Rule**.

   The selected rule name is deleted.

Related Topics

Specifying How to Apply the Discount

Adding a New Discount Rule

Renaming a Discount Rule

Setting Up Pricing for a Discount

After you add a discount to the discount offer, you setup pricing for each rule in a discount.

Perform the following tasks to setup a new price for a discount:

1. Specify how quantity ranges are selected. See "Selecting Quantity Ranges" for more information.
2. (Optional) Add quantity ranges to vary discounts based on usage. See "Adding Quantity Ranges to a Discount Pricing" for more information.
3. Configure balance impacts. See "Adding Balance Impacts for Discount Pricing" for more information.
4. (Optional) Add price tags to apply special pricing at purchase time. See "Adding Price Tags to Discounts."

Selecting Quantity Ranges

A discount rule specifies discount amounts based on a configured value, called the quantity range expression. For example, the value can be the charge for the event, the quantity used by an event, or a balance independent of the event. The absolute value of the quantity range expression result is used to select one or more quantity ranges that contain the discount amount. In addition to configuring this value, you need to specify how it is used to select one or more ranges by picking the Selection Type.

To specify which quantity ranges to use:

1. In the Pricing Details section of the Rule Details section, click the default value for the quantity range expression (Charge) in the following sentence:

   To select quantity ranges, evaluate the *Charge* **and** *Distribute Value Across Applicable Quantity Ranges*.

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The Expression Builder dialog box appears.

2. Use the expression builder to configure the expression to evaluate for quantity range selection. For example, this value can be the charge of the event, the quantity used by the event, or a balance independent of the event.
3. Click **OK**.
4. Select one of the following options from the selection type list.
   - **Pick the quantity range containing the value:** Selects a quantity range that contains the value of the quantity range expression.
   - **Distribute value across applicable quantity ranges:** Selects all quantity ranges that overlap the value of the quantity range expression.

Related Topics

Pricing Details Section

Expression Builder Dialog Box

Adding Quantity Ranges to a Discount Pricing

Use quantity ranges in a discount pricing to configure different balance impacts for different value range, for example, the quantity used by the event or the charge of the event.

To add a quantity range to a discount pricing:

1. In the Pricing Details section of the Rule Details section, click the **Add Quantity Range** icon:



The Add Quantity Range dialog box appears.

2. In the **Starting At** field, enter the starting value for the range.

   PDC automatically generates an end value for the range based on the existing quantity ranges.

   For example, if you specify 500, PDC creates the following ranges:

   - 0 – 500
   - 500 – No maximum

   If you then create another quantity range with a start value of 250, PDC creates the following ranges:

   - 0 – 250
   - 250 – 500
   - 500 – No maximum
3. Click **OK**.

   A Pricing table for the range is added.
4. Configure the balance impacts for this range. See "Adding Balance Impacts for Discount Pricing" for more information.

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Related Topics

Selecting Quantity Ranges

Modifying Quantity Ranges in Discount Pricing

To modify the quantity range in a discount pricing:

1. In the Pricing Details section of the Rule Details section, click the link in the **Quantity Range** field above the Pricing table for which you want to change the range.

   The Edit Quantity Range dialog box appears.

2. Modify the **Start** value, the **End** value, or both values.

   To modify the start value (except for the first quantity range), change the end value of the quantity range that precedes it.

   You cannot enter an end value that includes the entire following quantity range. Instead, to extend a range beyond the following range, first delete the following range. See "Deleting Quantity Ranges" for more information.

   By default, the last quantity range has no maximum end value. To specify an end value, select **Expression** and use a discount expression to specify the end value.

   PDC adjusts the start and end values of the preceding and following quantity ranges accordingly.

3. Click **OK**.

Deleting Quantity Ranges

Deleting a quantity range also deletes the pricing configured for it.

To delete a quantity range:

1. Go to the Rule Details section.
2. Click the **Delete Quantity Range** icon above the appropriate Pricing Details table:

   A confirmation message appears.

3. Click **OK**.

   The quantity range and the pricing configuration are removed from the pricing.

   If you deleted a middle range, PDC automatically adjusts the end value of the previous quantity range.

Adding Balance Impacts for Discount Pricing

Balance impacts define how a discount affects a specified balance element in an account. Each discount pricing can contain one or more balance impacts.

To add balance impacts to a discount pricing:

1. In the Pricing Details section of the Rule Details section, do one of the following:

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To add a debit or credit balance impact, click the **Add Balance Impact** icon in the pricing table:



To add a counter balance impact, click the **Add Counter** icon in the pricing table:



A row for the new balance impact is added to the table.

2. In the **Impact** column, select the type of impact to debit, credit or instant debit a balance, or to increment or decrement a counter.
3. In the **Balance Element** column, select the currency or noncurrency balance element to debit or credit.
4. In the **Amount** column, enter a discount percent, scaled amount, or fixed value. This value is applied towards the amount that is discounted.
5. Click in the **Per Unit** column, and select the option for how to apply the value in the **Amount** field towards the amount that is discounted.
6. Click the link in the **What to Discount** column, and select an expression in the Expression Builder dialog box.

   This expression determines the amount that is discounted, such as total charge or quantity used.
7. If balance impact is credit or a counter, click the **Amount is Valid** column, and select the validity period of the balance impact.

   For debit balance impacts, this column is not applicable.
8. In the **Apply To** column, select the balance to apply the discount to.
   - **User Balance:** The balance of the account or service that generates the event.
   - **Sharer Balance:** The balance of the account or service that owns the discount.
9. In the **Taxation Option** column, select whether to use a tax code, use a tax selector, or apply no tax.
10. In the **Tax Code or Selector** column, select the name of the tax code or tax selector to use.
11. In the **GLID** column, enter the General Ledger ID to associate with the balance impact.

Related Topics

Pricing Details Section

Expression Builder Dialog Box

Adding Price Tags to Discounts

You can use price tags to apply special prices to discounts at purchase time according to rules defined in setup components. You add price tags to the balance impacts of discounts. You can later edit or remove these tags as required.

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To add a price tag to the balance impact of a discount:

1. In the Pricing Details section of the Rule Details section, select a balance impact.
2. Click the **Price Tag** icon in the pricing table toolbar:



The Price Tag dialog box appears. See "Price Tag Dialog Box" for details.

3. From the **Price tag for** list, select **Amount**.
4. From the **Name** list, select a price tag name. Only the price tags that are valid for the discount are shown.
5. (Optional) Enter a description of the price tag.
6. Click **OK**.

Related Topics

Price Tag Dialog Box

Setting Up Pricing for a Discount

Identifying the Components That Use a Shared Discount

To identify the components that use a shared discount:

- In the Rule Details section of the discount, click **Used By**.

  The **Used By** button is available only when the discount is used by another component.

  The Used By page appears. This page provides an expandable hierarchical view of all the components that use the discount.

Related Topics

Adding an Existing Discount

Modifying Pricing without Inadvertently Affecting Other Components

When you modify a pricing in a discount used by multiple components, PDC enables you to specify which of those components you want your change to affect.

To specify which components are affected when you modify a pricing in a discount:

1. In the Pricing table in the discount Rule Details section, click the **Change Price** icon:



The Change Price dialog box appears.

2. Select one of the following options to indicate the scope of the price change:
   - **This discount wherever it is used:** Affects every component that uses this discount.

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- **The current offer only:** Affects only this discount offer. Other components that use the discount are not affected.

3. Click **OK**.

Related Topics

Pricing Table

Change Price Dialog Box

Adding Date Ranges to a Discount

The discount date range is the period during which a discount is effective. You can create multiple revisions of a discount for different date ranges.

To add a date range to a discount:

1. Go to the discount tab for which to add a date range.
2. From the **Discount Actions** list, select **New Date Range**.

   The New Date Range dialog box appears.
3. Enter the start date for the new range.

   PDC automatically calculates the end date based on the existing date ranges.
4. Click **OK**.

   The new date range is added to the discount. Its rules and the data they contain are copied from the preceding date range.

Related Topics

New Date Range Dialog Box

Modifying or Deleting Date Ranges in a Discount

To modify or delete a date range in a discount:

1. From the **Date Range** list, select **Manage**.

   The Manage Date Ranges dialog box appears.
2. Select the date range then do one of the following:
   - To edit the date range, click the **Edit** icon.

     In the Edit Date Range dialog box, edit the start and end dates or use the date selector to select a date, and click **OK**.
   - To delete a date range, click the **Delete** icon. Deleting a date range also deletes the pricing configured for that date range.

     A confirmation message appears. Click **Yes**.
3. Click **OK**.

Related Topics

Manage Date Ranges Dialog Box

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Changing Discount Details

You can change the following in an existing discount:

- The name of the discount

  If you do not enter a name for a discount when you create it, a default name is given to the discount.
- When to stop discounting
- The resource consumption order
- The taxation settings
- The discount validity settings

To edit a discount's details:

1. Open the discount offer that contains the discount.
2. If the discount offer is in read-only mode, click **Edit** in the discount offer toolbar.
3. In the Discounts section, click the appropriate discount tab.
4. From the **Discount Actions** list, select **Discount Details**.

   The Discount Details dialog box appears.
5. Change the value of one or more fields.
6. Click **OK**.
7. Click **Save and Done**.

Related Topics

Discounts Section

Discount Details Dialog Box

Removing a Discount from a Discount Offer

To remove a discount from a discount offer:

1. Open the discount offer that contains the discount.
2. In the Discounts section, click the appropriate discount tab.
3. From the **Discount Actions** list, select **Remove Discount**.
4. In the Confirmation dialog box, click **OK**.

   The discount is removed from the discount offer, but it is not deleted from PDC. See "Deleting Pricing Components" for information about deleting discount offers from PDC.

Create Discount Offer Page Reference

Use the **Create Discount Offer** page to create discount offers and the discounts and pricing they contain.

For a description of the fields, see:

- General Information Section

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- Discounts Section

General Information Section

Use the General Information section to provide general information and settings for the discount offer.

For a description of the subsections in General Information, see:

- Product Specification Attributes Subsection
- Offer Settings Subsection

Field	Description
Name, Description	Enter a unique name and a description for the discount offer.
Type	Select one of the following discount offer types: • **Subscription:** Contains discounts for any type and combination of recurring and usage events. These discounts apply only to the subscriber who owns the discount offer. • **System:** Contains discounts that apply to all subscribers who use a particular service.
Applicable To	Select the service for which you want to create the discount offer. Select **Account** if you want the discount to apply to any service owned by the account.
Phase	This field is read-only and specifies the status of the new discount offer.

Related Tasks

Specifying General Information for a Discount Offer

Offer Settings Subsection

Field	Description
Available for Purchase	Set the purchase **Start** and **End** dates to specify the period during which the discount offer can be purchased. By default, the purchase period begins as soon as you save the discount offer, and it never expires. To set a specific start date and time, deselect **Immediately**. To set a specific end date and time, deselect **Never**. The start date is included in the purchase period, but the end date is not. For example, if the start date is May 1 and the end date is May 10, the offer can be purchased from May 1 through May 9. To be added to a bundle, a discount offer must have a purchase period that is the same as or greater than the bundle's purchase period. See "Setting Validity Periods" for more information.

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Field	Description
Apply this discount to	Select one of the following options that determines how the discounts are applied to the charge when a charge is eligible for multiple discount offers. • **Original Charge:** The discount offer is applied to the original charge amount, regardless of whether that amount was reduced by previous discount offers. • **Remaining Charge:** The discount offer is applied to the remaining charge amount after previous discount offers are applied. • **Remaining Charge and Quantity:** The discount offer is applied only to the part of the charge and quantity that have not been used as the basis for a previous discount offer. This option is not valid for discount offers that credit a balance.
Provisioning Tag	(Optional) Select a provisioning tag for the discount offer. In Oracle Communications Billing and Revenue Management (BRM), provisioning tags are used to implement extended rating attributes (ERAs), such as a discount for calls to friends and family on a subscriber's birthday, or to configure telco service extensions and supplementary services, such as call forwarding and call blocking. For more information, see the BRM documentation.
Priority	Enter the priority for the discount offer. When more than one discount offer applies to the same event, the priority determines the order in which the discount offers are evaluated. The higher the number, the higher the priority; zero is the lowest priority.
Customers Can Purchase	Enter the quantity of the discount offer that a customer can buy at one time. To set specific limits, deselect **No Minimum** and **No Maximum**. The minimum and maximum values are included in the valid range.
Customers Can Own	Enter the quantity of the discount offer that a customer can own at one time. To set specific limits, deselect **No Minimum** and **No Maximum**. The minimum and maximum values are included in the valid range. The minimum ownership quantity must be equal to or less than the minimum purchase quantity. For example, if a discount offer provides 100 MB of disk space, you can limit customers to 500 MB by setting the maximum ownership quantity to 5.
Share discount offer with members of billing hierarchy	To enable discount offer sharing with all members of a corporate sharing group, select this check box.
Discount Exclusion	Click the link in this field to specify the discount offers that cannot be used along with the current discount offer. In the Discount Exclusion dialog box, search for the discount offers and select the ones that you want to include in the discount exclusion.
Tie Discount Offer with Charge Offer	Select this to allow the discount offer to be tied to a charge offer. By default, this field is not selected.

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Field	Description
Timestamp Validity Rounding Policy	(Optional) Specify one of the options for the discount offer's validity period: • **Starts at midnight**: Starts at midnight (00:00:00) of the day the discount offer is purchased. • **Use purchase time**: Starts at the time of purchase. • **Use system default**: Uses systemwide setting. This is the default option.

Related Tasks

Specifying General Information for a Discount Offer

Product Specification Attributes Subsection

Use the Product Specification Attributes subsection to provide values for any product specification attributes configured in XML template files. The fields available in this subsection depend on what is configured in the XML template file.

See "About Extended Attributes for Pricing Components" in *PDC Creating Product Offerings* for more information.

Search for Discount Offers Dialog Box

Use Search for Discount Offers dialog box to search for existing discount offers to add to the discount exclusion.

Field	Description
Pricing Component	Specifies the component to search for. This field displays **Discount Offer**.
Applicable To	Select the service associated with the discount offers that you want to search. Select **Account** if you want to search for discount offers that apply to Account.
Name	(Optional) Enter a full or partial name of the discount offers to search for. Select an operator from the operator list, then enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the discount offers that meet the search criteria. Select the discount offers that you want to add as discount exclusions and click **OK**.

Field	Description
Name	Lists the discount offers that match the search criteria.
Description	Displays a description for each discount offer.

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Field	Description
Phase	Displays the status of the discount offers. • **Draft:** The discount offer is only visible to the user. • **Promoted:** The discount offer has been validated and is visible for other users to use.
Applicable To	Displays the service associated with the discount offer.

Related Tasks

Specifying General Information for a Discount Offer

Related Topics

Searching for Pricing Components

Discounts Section

Use the Discounts section to add discounts and discount rules to the discount offer.

When a discount is added to a discount offer, it appears in a tab in the Discounts section. The tab contains two sections: Rule Details and Pricing Details.

Add Discount List

List Item	Description
Add New Discount	Select to create a new discount to add to the discount offer. See "Adding a New Discount" for more information.
Add Existing Discount	Select to add an existing discount to the discount offer. See "Adding an Existing Discount" for more information.
Add Existing Discount Selector	Select to add an existing discount selector to the discount offer. See "Adding a Discount Selector" for more information. **Note:** When you add a discount selector to a discount, the discount selector is read-only. To edit the selector, click link in the **Discount Selector** field at the top of the discount. The selector appears in an editable tab.

Used By Button

Click this button to display a hierarchical view of all the components that use the discount.

Discount Actions List

List Item	Description
Add Rule	Select this item to add a rule to the discount. See "Configuring Discount Rule" for more information.
Discount Details	Click this item to display details about the discount. See "Changing Discount Details" for more information.
Remove Discount	Click this item to remove the discount from the discount offer. See "Removing a Discount from a Discount Offer" for more information.

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Related Tasks

Adding Discounts to a Discount Offer

Create Discount Dialog Box

Use the Create Discount dialog box to specify information for the discount that you want to create.

See "Taxation Section" for a description of the taxation fields.

See "Validity Section" for a description of the discount validity fields.

> **Note**
>
> Not all the fields described in the following table might display depending on the pricing profile that you select for the discount.

Field	Description
Discount Category	Select the type of event for which you want to create the discount: • **Recurring:** Event that occurs on a fixed interval, such as a monthly subscription fee, that is not generated or affected by usage. • **Usage:** Event for service usage, such as telephone calls or Internet sessions. • **One Time:** Event for one-time charge, such as setup fee.
Discount Type	Select the event for which you want to create the discount.
Pricing Profile	Select a pricing profile for the discount.
Name	(Optional) Enter a unique name for the discount. If you do not specify a name, PDC automatically generates a default name.
Stop Discounting	(Optional) Specify whether to apply the discount after it has been canceled or inactivated to events that occurred prior to the discount cancellation or inactivation. • **Never:** Never include inactive or canceled discounts. • **When Inactive:** Include inactive discounts but not canceled discounts. • **When Cancelled:** Include canceled discounts but not inactive discounts. • **When Inactive or Cancelled:** Include both inactive and canceled discounts.

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Field	Description
Resources Consumption Order	(Optional) Specify whether to consume noncurrency resources for the discounts in order of earliest expiry, or in order of any discount rules configured. This option is only available for ECE enabled system. • **Earliest Expiry**: Consume noncurrency resources according to which resource expires first. For example, if the customer is subscribed to one discount that grants minutes that expire monthly and another that grants minutes that expire yearly, the minutes expiring monthly should be consumed first. If two or more resources have the same validity dates, the discount rule order will be used. • **Rule Order**: Consume balances according to the configured discount rules, without taking validity into account.
This Is a Snowball Discount	(Optional) Select if this discount is a snowball discount. In Oracle Communications Billing and Revenue Management (BRM), a snowball discount is a type of shared billing-time discount that distributes a discount to all accounts in a discount sharing group. For more information, see the BRM documentation.

Related Tasks

Adding a New Discount

Taxation Section

Use the Taxation section to specify how to apply taxes on a discount.

Field Name	Description
Option	Select one of the following ways to apply a tax: • **No Tax**: Do not apply taxes. • **Use Tax Code**: Applies a specific tax code. • **Use Tax Selector**: Applies a specific tax selector.
Tax Code or **Tax Selector**	Select the name of the tax code or tax selector. **Note:** If you have selected **No Tax**, this field is not displayed.

Validity Section

Use the Validity section to specify how to set the validity dates when the discount is owned for only part of a billing cycle.

Section	Description
When Discount Is Valid From Mid-cycle:	Select how to set the validity start date when the discount is purchased in the middle of a billing cycle: • **Apply From Validity Start:** (Default) Apply the discount from the validity start. • **Apply To Full Cycle:** Apply the discount for the full cycle. • **Don't Apply To This Cycle:** Do not apply the discount for the cycle.

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Section	Description
When Discount Is Valid To Mid-cycle:	Select how to set the validity end date when the discount ends in the middle of a billing cycle: • **Apply To Validity End:** (Default) Apply the discount to the validity end. • **Apply To Full Cycle:** Apply the discount for the full cycle. • **Don't Apply To This Cycle:** Do not apply the discount for the cycle.
When Discount Is Valid For Part Of Cycle:	Select how to set the validity start and end dates when the discount is owned for only part of a billing cycle: • **Apply From Validity Start To Validity End:** (Default) Apply the discount from the validity start to the validity end. • **Apply To Full Cycle:** Apply the discount for the full cycle. • **Don't Apply To This Cycle:** Do not apply the discount for the cycle.

Related Tasks

Changing Discount Details

Search for Discounts Dialog Box

Use the Search for Discounts dialog box to search for existing discounts to include in the discount offer.

Field	Description
Pricing Component	Specifies the pricing component to search for. This field displays **Discount**.
Profile	(Optional) Select the pricing profile associated with the discount you want to search. To find discounts associated with any profile, select **Any**.
Name	(Optional) Enter a full or partial name of the discount to search for. Select an operator from the operator list, then enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the discounts that meet the search criteria. Select the discounts to include in the discount offer and click **OK**.

Field	Description
Name	Lists the discounts that match the search criteria.
Description	Displays a description for each discount.

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Field	Description
Phase	Displays the status of the discount: • **Draft:** The discount is only visible to the user. • **Promoted:** The discount has been validated and is visible for other users to use.

Related Tasks

Adding an Existing Discount

Related Topics

Searching for Pricing Components

Search for Discount Selectors Dialog Box

Use the Search for Discount Selectors dialog box to search for existing discount selectors to include in the discount.

Field	Description
Pricing Component	Specifies the type of pricing component to search for. This field displays **Discount Selectors**.
Applicable To	Select the service associated with the discount selector you want to search. Select **Account** if you want to search for discount selectors that apply to Account.
Event Name	Select the event associated with the discount selector you want to search.
Profile	(Optional) Select the pricing profile associated with the discount. To find discounts associated with any profile, select **Any**.
Name	(Optional) Enter a full or partial name of the discount selectors to search for. Select an operator from the operator list, then enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the discount selectors that meet the search criteria. Select a discount selector and click **OK**.

Field	Description
Name	Lists the discount selectors that meet the search criteria.
Description	Displays a description for each discount selector.
Phase	Displays the status of the discount selector: • **Draft:** The discount selector is only visible to the user. • **Promoted:** The discount selector has been validated and is visible for other users to use.

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Field	Description
Applicable To	The service to which the discount selector applies. Displays **Account** if discount selector is applicable to Account.

Related Tasks

Adding a Discount Selector

Related Topics

Searching for Pricing Components

New Date Range Dialog Box

Use the New Date Range dialog box to add a new date range for the discount.

In the **Date Range Effective** field, enter the start date for the new date range or use the date selector to select a date.

PDC automatically calculates the end date based on the existing date ranges in the discount.

Related Tasks

Adding Date Ranges to a Discount

Manage Date Ranges Dialog Box

Use the Manage Date Ranges dialog box to add, change, or delete date ranges in a discount. The dialog box contains a table that lists all the date ranges in a discount.

- To add a date range, click the **Add** icon.

  In the New Date Range dialog box, enter the new date.
- To change a date range, select the appropriate range and then click the **Edit** icon.

  In the Edit Date Range dialog box appears, edit the start and end dates.
- To delete a date range, select the appropriate range and then click the **Delete** icon. Deleting a date range also deletes the pricing configured for that date range.

  A confirmation message appears. Click **OK**.

Related Tasks

Modifying or Deleting Date Ranges in a Discount

Edit Date Range Dialog Box

Use the Edit Date Range dialog box to change the start and end dates for a date range in a discount.

Field	Description
Start	Enter the new start date or use the date selector to select a date. (For the first date range only) Deselect **Immediately**, then enter a date or use the date selector to select a date.

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Field	Description
End	Enter the new end date or use the date selector to select a date. (For the last date range only or when only one date range exists) Deselect **Never Ends**, then enter a date or use the date selector to select a date.

Related Tasks

Modifying or Deleting Date Ranges in a Discount

Rule Details Section

Use the Rule Details section to configure the discount rules.

For a description of the fields, see:

- Filters Section
- Trigger Section
- Pricing Details Section

Field	Description
Apply this discount to	(Optional) Select how to apply the discount. By default, a discount rule applies the discounts in the same way as the discount offer that contains the rule. • **Original Charge:** The discount offer is applied to the original charge amount, regardless of whether that amount was reduced by previous discount offers. • **Remaining Charge:** The discount offer is applied to the remaining charge amount after previous discount offers are applied. • **Remaining Charge and Quantity:** The discount offer is applied only to the part of the charge and quantity that have not been used as the basis for a previous discount offer. This option is not valid for discount offers that credit a balance.
Filter	Click the link in this field to configure one or more filters for the discount. A discount filter defines the parts of a charge that are subject to a discount.
Trigger	Click the link in this field to configure a trigger for the discount. A discount trigger enables you to set conditions that must be met for the discount to be applied.

Filters Section

A discount filter defines the parts of a charge that are subject to a discount. A discount can have multiple filters. A charge must satisfy the criteria in at least one of those filters to be eligible for the discount. By default, all charges that impact a currency balance are subject to the discount.

Use the table in the Filter section to add discount filters to the discount. The table displays the name and description of each filter used by the discount.

Click the **Add** icon in the table to add a new filter to the discount. In the Filter Details subsection, set the values for the fields that you want to use to define the filter.

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In the filter definition, regular expressions can be entered in the following fields:

- **GLID**
- **Time Period**
- **Impact Category**
- **Usage Class**
- **Usage Type**
- **Service Class**
- **Pricing Name**

To match any value, use .* (dot asterisk) or leave the field empty. Do not use only an asterisk (*) in regular expressions.

You can enter multiple values separated by pipes (|) in the **GLID** field.

You can enter NOT operator in the following fields to specify the values to be excluded:

- **GLID**
- **Time Period**
- **Impact Category**
- **Generic Selector Result**

> **Note**
>
> PDC does not validate the expressions entered in the fields.

Click the **Search** icon to search for existing filters and add to the discount.

Related Tasks

Configuring Discount Filters

Search for Filters Dialog Box

Use the Search for Filters dialog box to search for existing discount filters to include in the discount.

Field	Description
Pricing Component	Displays the pricing component to search for. This field displays **Filters**.
Profile	Displays the pricing profile associated with the discount filter you want to search.
Name	(Optional) Enter a full or partial name of the discount filter to search for. Select an operator from the operator list and enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

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Results Table

The Results tables lists the discount filters that meet the search criteria. Select a discount filter and click **OK**.

Field	Description
Name	Lists the discount filters that match the search criteria.
Description	Displays a description for each discount filter.
Phase	Displays the status of the discount filter. • **Draft:** The discount filter is only visible to the user. • **Promoted:** The discount filter has been validated and is visible for other users to use.

Related Tasks

Configuring Discount Filters

Related Topics

Searching for Pricing Components

Trigger Section

Use the Trigger section to define the trigger conditions that must be met before the discount is applied.

Field	Description
Name, Description	Enter a name and a description for the discount trigger.

Use the table in the Trigger Details section when adding a discount trigger.

Column	Description
Expression	Select a trigger expression by clicking the link in the cell and then selecting an expression in the Expression Builder dialog box. You can add more elements to an expression by entering standard arithmetic operators, decimal constants, and other expressions in the **Expression** field.
Operator	Select an operator for the trigger condition.
Value	Enter a value for the trigger condition.

Related Tasks

Configuring Discount Triggers

Search for Triggers Dialog Box

Use the Search for Triggers dialog box to search for existing discount triggers to add to the discount.

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Field	Description
Pricing Component	Displays the pricing component to search for. This field displays **Trigger**.
Profile	Displays the pricing profile associated with the discount trigger you want to search.
Name	(Optional) Enter a full or partial name of the discount trigger to search for. Select an operator from the operator list and enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the discount triggers that meet the search criteria. Select a discount trigger and click **OK**.

Field	Description
Name	Lists the discount triggers that match the search criteria.
Description	Displays a description for each discount trigger.
Phase	Displays the status of the discount trigger: • **Draft:** The discount trigger is only visible to the user. • **Promoted:** The discount trigger has been validated and is visible for other users to use.

Related Tasks

Configuring Discount Triggers

Related Topics

Searching for Pricing Components

Expression Builder Dialog Box

Use the Expression Builder dialog box to define an expression using expression elements.

Field	Description
Expression	Displays the expression. Select elements from the **Expression Element** list to add to the expression. You can add multiple elements to the expression by entering standard arithmetic operators, decimal constants, and other expressions.

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Field	Description
Expression Element	Select an element to add to the expression. The following list contains all of the elements. The availability of a particular function depends on the context. • **Balance[]:** Specifies the balance for a particular balance element. • **Charge:** Specifies the total charge for an event. • **Function[]:** Specifies an iScript function that retrieves the data required for the discount. You must also enter a value in the **Function Name** field. This value is used to reference the function; for example, the function to retrieve the total charges for the 10 most frequently called numbers during the billing cycle. • **Max:** Specifies the maximum value. • **Member Balance[]:** Specifies the member balance to evaluate in the expression (rather than the owner balance). • **Min:** Specifies the minimum value. • **Number:** The numeric value for discounts. • **Quantity:** Specifies the total quantity in an event, such as the number of minutes talked or megabytes downloaded. • **StepQuantity:** Specifies the amount of event quantity that falls within a quantity range. • **StepCharge:** Specifies the amount of currency charge that falls within a quantity range. • **Round:** If the digit to the right of the specified precision is equal to or greater than 5, the last significant digit is rounded up to the next highest digit. Otherwise, all the digits to the right of the specified precision are truncated. For example, if the expression is Round(Charge; 2) and the charge is 1.131, the charge is rounded to 1.13. • **Round Up:** If the digits to the right of the specified precision are non-zero, the last significant digit is always rounded up to the next highest digit. For example, if the expression is Round Up(Charge; 2) and the charge is 1.151, the charge is rounded to 1.16. • **Round Down:** Truncates the element value to the specified precision. For example, if the expression is Round Down(Charge; 2) and the charge is 1.159, the charge is rounded to 1.15. • **Round Bankers:** If incrementing the digit at the specified precision results in an even number, the digit at the specified precision is rounded up and the digits to its right are truncated. Otherwise, the digits to the right of the specified precision are truncated. For example, if the expression is Round Bankers(Charge; 2) and the charge is 1.159, the charge is rounded to 1.16. If the charge is 1.149, the charge is rounded to 1.14. • **Decimal Absolute:** Derives an absolute value from a decimal value. • **Square Root:** Calculates the square root of the input value.

Pricing Details Section

Use the Pricing Details section to configure pricing for the discount rule.

For each discount rule, you configure pricing to specify which balances are impacted by the rule and how they are impacted.

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Field	Description
Quantity Range Expression	Click to define the expression to evaluate the quantity range selection. The **Quantity Range Expression** is the link specified in the following sentence in the Pricing Details section: **To select quantity ranges, evaluate the value of** *Charge* and *Distribute Value Across Applicable Quantity Ranges*.
Selection Type	Select one of the following options to specify how to select one or more quantity ranges: • **Pick the quantity range containing the value:** Selects the quantity range that contains the value of the **Quantity Range Expression**. • **Distribute value across applicable quantity ranges:** Selects the quantity ranges that overlap the value of the **Quantity Range Expression**.
Add Quantity Range 	Click to add a quantity range to pricing.
Change Price 	Click to specify the components that get affected by the price change.
Add Balance Impact 	Click to add a balance impact to the pricing.
Add Counter 	Click to add a counter balance impact to the pricing.
Pricing Details table	Enter data to specify which balances are impacted and how they are impacted. For a description of the fields, see "Pricing Table".

Related Topics

Expression Builder Dialog Box

Related Tasks

Adding Quantity Ranges to a Discount Pricing

Adding Balance Impacts for Discount Pricing

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Pricing Table

Each row in the Pricing Details table represents a balance impact for the event associated with the discount.

Depending on the discount type and profile associated with a discount, only a subset of these columns might appear.

Column	Description
Impact	Select whether to credit, debit or instant debit a balance, or to increase or decrease a counter.
Balance Element	Select the currency or noncurrency balance element to debit or credit.
Amount	Enter the discount percent, scaled-amount, or fixed value.
Per Unit	Click the link to display the Per Unit dialog box, then select one of the following options to specify how to apply the value in the **Amount** field to the amount that is discounted. • **Percent of:** Applies the value in the **Amount** field as the discount percentage. For example, if **Amount** is 20, the charge is discounted by 20%. • **For every** *x* **unit:** Applies the value in **Amount** field per unit specified. Select **Round Down** to round resulting discount down to the nearest specified unit, otherwise the value is not rounded. • **Fixed:** Applies the value in **Amount** field as a flat discount amount.
What to Discount	Click the link and select an expression in the Expression Builder dialog box. The value of the expression determines the amount that is discounted. **Note:** When **Apply this discount to** is set to **Remaining Charge and Quantity**, the discounted amount is preset and you cannot change it.
Amount Is Valid	Click the link to display the Amount Is Valid dialog box. Select the validity period of the discount balance impact. For debit balance impacts, this field is not applicable.
Apply To	Select the balance to apply the discount to. • **User Balance:** The balance of the account or service that generates the event. • **Sharer Balance:** The balance of the account or service that owns the discount.
Taxation	Specify how to apply taxes to the discount using these fields. • **Option:** Select whether to apply taxes: – **No Tax:** Does not apply taxes. – **Use Tax Code:** Applies the specified tax code. – **Use Tax Selector:** Applies the specified tax selector. • **Tax Code or Selector:** Select the name of the tax code or tax selector.
GLID	Enter the General Ledger ID to associate with the balance impact.

Related Tasks

Adding Balance Impacts for Discount Pricing

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Change Price Dialog Box

Use the Change Price dialog box to indicate the scope of a price change.

The available options depend on whether the dialog box is displayed from within a discount offer, a discount, a discount selector, or a price selector.

Field	Description
This Price Change Will Affect	Select one of the following options to indicate the scope of the price change: • **This discount wherever it is used:** Affects every component that uses this discount. • **The current offer only:** Affects only this discount offer. Other components that use the discount are not affected.

Related Tasks

Adding an Existing Discount

Amount Is Valid Dialog Box

Use the Amount Is Valid dialog box to select the validity period for the credited amount in the balance impact.

Use the list on the left to select the validity start time. The list includes the following options:

- **Always**: The amount is always valid.
- **From Event Occurrence**: The amount is valid from the occurrence of the event associated with the balance impact.
- **From First Usage**: The amount is valid from the first time it is impacted by a subscriber's usage.
- **From Specific Date**: The amount is valid from the date that you specify.
- **Relative to Event Occurrence**: The amount is valid relative to the occurrence of the event associated with the balance impact. Select one of the following options:
  - **From start of**: To make the amount valid from the start of the billing or accounting cycle in which the event occurs.
  - **In**: To make the amount valid in any number of accounting cycles, billing cycles, months, days, hours, minutes, or seconds from the event occurrence.

    For example, if you specify two accounting cycles, the amount will be valid after two accounting cycles from when the event occurs.

Use the list on the right to select the validity end time (when the amount can no longer be used). The list includes the following options:

- **No End Date**: The amount validity does not end.
- **End Relative to Validity Start**: The amount validity ends relative to the validity start time. Enter the number of accounting cycles, billing cycles, months, days, calendar days, hours, minutes, or seconds from the validity start time when the validity ends.

  For example, if you specify five days, the amount will not be valid after five days from the validity start time.

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> **Note**
>
> You can use calendar days only for discounts with the Convergent Usage pricing profile.

- **Until Specific Date**: The amount validity ends on the date that you specify.

Related Tasks

Adding Balance Impacts for Discount Pricing

Price Tag Dialog Box

Use the Price Tag dialog box to apply price tags to pricing components.

Field	Description
Price tag for	Select one of the following attributes to override the value at run time: • **Amount:** Overrides the amount at run time. • **Increment:** Overrides the number of units to which the charge or discount applies.
Name	Select a price tag from the list. Only the price tags that are valid for the selected pricing component are shown. **Tip**: Select **Not Set** to clear the price tag.
Description	Enter a description for the price tag.
Scope	Displays **Event Profile** by default.

Related Tasks

Adding Price Tags to Usage Charges

Discount Details Dialog Box

Use the Discount Details dialog box to view and edit settings in a discount.

The mode of this dialog box (read-only or edit) matches the mode of the discount from which it is opened.

See "Taxation Section" for a description of the taxation fields.

See "Validity Section" for a description of the discount validity fields.

Field	Description
Discount Category	Displays the category of event to which the discount applies: • **Recurring:** Event that occurs on a fixed interval, such as a monthly subscription fee, that is not generated or affected by usage. • **Usage:** Event for service usage, such as telephone calls or Internet sessions. • **One Time:** Event for one-time charge, such as setup fee.
Discount Type	Displays the type of event to which the discount applies.
Pricing Profile	Displays the pricing profile for the discount.

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Field	Description
Name	Displays the name of the discount. If you did not specify a name, PDC displays a default name.
Stop Discounting	Displays whether to apply the discount after it has been canceled or inactivated to events that occurred prior to the discount cancellation or inactivation. • **Never:** Never include inactive or canceled discounts. • **When Inactive:** Include inactive discounts but not canceled discounts. • **When Cancelled:** Include canceled discounts but not inactive discounts. • **When Inactive or Cancelled:** Include both inactive and canceled discounts.
Resources Consumption Order	Displays whether to consume noncurrency resources for the discounts in order of earliest expiry, or in order of any discount rules configured. This option is only available for ECE enabled system. • **Earliest Expiry:** Consume noncurrency resources according to which resource expires first. For example, if the customer is subscribed to one discount that grants minutes that expire monthly and another that grants minutes that expire yearly, the minutes expiring monthly should be consumed first. If two or more resources have the same validity dates, the discount rule order will be used. • **Rule Order:** Consume balances according to the configured discount rules, without taking validity into account.
This Is a Snowball Discount	Displays if this discount is a snowball discount. In Oracle Communications Billing and Revenue Management (BRM), a snowball discount is a type of shared billing-time discount that distributes a discount to all accounts in a discount sharing group. For more information, see the BRM documentation.

Related Tasks

Changing Discount Details

Taxation Section

Use the Taxation section to view and edit how to apply taxes on a discount.

Field Name	Description
Option	Displays how to apply taxes to the discount: • **No Tax**: Do not apply taxes. • **Use Tax Code**: Applies a specific tax code. • **Use Tax Selector**: Applies a specific tax selector.
Tax Code or **Tax Selector**	Displays the name of the tax code or tax selector. **Note:** If you have selected **No Tax**, this field is not displayed.

Related Tasks

Changing Discount Details

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Validity Section

Use the Validity section to view or edit how validity dates are set when the discount is owned for only part of a billing cycle.

Section	Description
When Discount Is Valid From Mid-cycle:	Displays how to set the validity start date when the discount is purchased in the middle of a billing cycle: • **Apply From Validity Start:** (Default) Apply the discount from the validity start. • **Apply To Full Cycle:** Apply the discount for the full cycle. • **Don't Apply To This Cycle:** Do not apply the discount for the cycle.
When Discount Is Valid To Mid-cycle:	Displays how to set the validity end date when the discount ends in the middle of a billing cycle: • **Apply To Validity End:** (Default) Apply the discount to the validity end. • **Apply To Full Cycle:** Apply the discount for the full cycle. • **Don't Apply To This Cycle:** Do not apply the discount for the cycle.
When Discount Is Valid For Part Of Cycle:	Displays how to set the validity start and end dates when the discount is owned for only part of a billing cycle: • **Apply From Validity Start To Validity End:** (Default) Apply the discount from the validity start to the validity end. • **Apply To Full Cycle:** Apply the discount for the full cycle. • **Don't Apply To This Cycle:** Do not apply the discount for the cycle.

Related Topics

Discount Details Dialog Box

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6

Chargeshare Offers

A chargeshare offer contains one or more chargeshares that specify how charges are shared among the members of a group. Charge sharing enables an account to sponsor the charges of other accounts in the group. The sponsoring account receives the balance impact of charges incurred by the group member accounts.

To work with chargeshare offers, see the following tasks:

- Creating a Chargeshare Offer
- Adding Chargeshares to a Chargeshare Offer
- Configuring Chargeshare Rules
- Setting Up Pricing for a Chargeshare
- Adding Date Ranges to a Chargeshare
- Modifying or Deleting Date Ranges in a Chargeshare
- Changing Chargeshare Details
- Removing a Chargeshare from a Chargeshare offer
- Create Chargeshare Offer Page Reference

For overview information, see "About Chargeshare Offers" in *PDC Creating Product Offerings*.

Creating a Chargeshare Offer

To create a chargeshare offer:

1. In the Pricing section of the navigation pane, under **Offers**, click **Create ChargeShare Offer**.

   The **Create ChargeShare Offer** page appears.
2. Specify general information and offer settings. See "Specifying General Information and Settings for a Chargeshare Offer".
3. Add chargeshares. See "Adding Chargeshares to a Chargeshare Offer".
4. Add rules for the ChargeShares in the ChargeShare offer. See "Configuring Chargeshare Rules".
5. Configure pricing for the ChargeShares in the ChargeShare offer. See "Setting Up Pricing for a Chargeshare".

Related Topics

Create Chargeshare Offer Page Reference

Specifying General Information and Settings for a Chargeshare Offer

To specify general information and settings:

1. Enter a unique name and a description for the chargeshare offer.

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2. From the **Applicable To** list, select the service for which you want to create the chargeshare offer.
3. Select **Use for Aggregation**.
   The ChargeShare offer is set for aggregation.
4. Expand the Product Specification Attributes subsection.
5. If any product specification attributes were defined for chargeshare offers in an XML template file, set their values.
6. Expand the Offer Settings subsection.
7. In the **Available** group, specify the period when the chargeshare offer is valid.

Related Topics

General Information Section

Creating a Chargeshare Offer

Adding Chargeshares to a Chargeshare Offer

A chargeshare specifies how charges are shared among the members of a group. You can configure one or more chargeshares for events associated with the service to which the chargeshare offer applies.

You add chargeshares to a chargeshare offer in the following ways:

- Configure a new chargeshare. See "Adding a New Chargeshare".
- Use an existing chargeshare from another chargeshare offer. See "Adding an Existing Chargeshare".

Adding a New Chargeshare

To add a new chargeshare to the chargeshare offer:

1. In the Chargeshares section, from the **Add ChargeShare** list, select **Add New ChargeShare**.

   The Create ChargeShare dialog box appears.
2. From the **ChargeShare Category** list, select the type of event for which you want to create the chargeshare.
3. From the **ChargeShare Type** list, select the event for which you want to create the chargeshare.

   The remaining fields in the dialog box are updated based on the chargeshare type that is selected.
4. (Optional) Enter a unique name for the chargeshare.
5. (Optional) From the **Stop ChargeSharing** list, specify whether to apply the chargeshare after it has been canceled or inactivated to events that occurred prior to the chargeshare cancellation or inactivation.
6. (Optional) In the Taxation section, do one of the following:
   - To not apply taxes to the chargeshare: Select **No Tax** from the **Option** list.
   - To apply a specific tax code to the chargeshare: Select **Use Tax Code** from the **Option** list, and then select the name of the tax code from the **Tax Code** list.

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- To use a tax selector to apply a tax code to the chargeshare based on account, service, event, and profile attributes: Select **Use Tax Selector** from the **Option** list, and then select the name of the tax selector from the **Tax Selector** list.

7. Click **OK**.

   A tab for the chargeshare is added to the Chargeshares section.

Related Topics

Create ChargeShare Dialog Box

Adding Chargeshares to a Chargeshare Offer

Adding an Existing Chargeshare

To add an existing chargeshare:

1. In the Chargeshares section, from the **Add ChargeShare** list, select **Add Existing ChargeShare**.

   The Search for ChargeShares dialog box appears.
2. Search for the existing ChargeShares to add to the ChargeShare offer.
3. In the Results table, select the ChargeShares, and click **OK**.

   The Select ChargeShare Type dialog box appears.
4. From the **ChargeShare Type** list, select the event type for the ChargeShare.

   A tab for the ChargeShare is added to the ChargeShares section.

Related Topics

Search for ChargeShares Dialog Box

Adding Chargeshares to a Chargeshare Offer

Reordering ChargeShare Rules

To reorder a ChargeShare rule:

1. In the Pricing section of the navigation pane, click **Search Pricing**.
2. Click **Advanced**.

   The Search page appears.
3. Select **ChargeShare** from the Pricing Component list and click **Search**.
4. Select the required ChargeShare offer.

   The **ChargeShare Offer** page appears.

   All available rules for the selected ChargeShare are displayed in the Rules tab as subtabs.
5. Click **Edit** to modify or reorder the rules.
6. In the Rule Details section, select a rule.
7. Drag and drop it to the desired location in the Rules tab or do the following:
   a. Click **ChargeShare Actions**.
   b. Click **Rule Actions**.

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c. Click **Move Rule**.

   The **Move the Rule** dialog appears.

d. From the **Move the rule before** list, select the desired location.

e. Click **OK**.

The rule is moved to the new location.

8. Click **Save**.
9. Click **Save and Done**.

Related Topics

Rule Details Section

Adding Chargeshares to a Chargeshare Offer

Configuring Chargeshare Rules

A chargeshare rule specifies how to calculate and apply a chargeshare.

A chargeshare can have one or more rules. If a chargeshare has multiple rules, each rule appears in a subtab in the Chargeshares section. The sequence of the rules is important—they are run from left to right.

After adding a chargeshare to the chargeshare offer, perform the following tasks to configure one or more rules for the chargeshare:

1. (Optional) Configure the chargeshare filters. See "Configuring Chargeshare Filters".
2. (Optional) Configure the chargeshare triggers. See "Configuring Chargeshare Triggers".
3. Configure pricing for the chargeshare. See"Setting Up Pricing for a Chargeshare".
4. (Optional) Add rules. See "Adding a New Chargeshare Rule".

Configuring Chargeshare Filters

A chargeshare filter defines the parts of a charge that are subject to the chargeshare. By default, charges that impact a currency balance are subject to the chargeshare.

You can have multiple filters for a chargeshare.

To configure a chargeshare filter:

1. In the Rule Details section, click the link in the **Filter** field.

   The Filter section appears. The table in this section displays the filters currently used by the chargeshare.

2. Do any of the following:
   - Add a new filter to the chargeshare. See "Adding a New Chargeshare Filter".
   - Add an existing filter to the chargeshare. See "Adding an Existing Chargeshare Filter".
   - To change the criteria for a filter, click the filter name link and edit the criteria in the Filter Details subsection.

Related Topics

Filter Section

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Adding a New Chargeshare Filter

To add a new filter:

1. Click the **Add** icon in the table.
2. In the Filter Details subsection, enter a name and description for the filter.
3. Set the values for any of the following fields that you want to use to define the filter:
   - **Date Range**
   - **Balance Element**
   - **GLID**
   - **Measured By**
   - **Time Period**
   - **Impact Category**
   - **Usage Class**
   - **Usage Type**
   - **Service Class**
   - **Service Code**
   - **Charge Offer**

   You can enter regular expressions in the following fields:
   - **Time Period**
   - **Usage Class**
   - **Usage Type**
   - **Service Class**
   - **Service Type**
   - **Impact Category**

   To match any value, use .* (dot asterisk) or leave the field empty. Do not use only an asterisk (*) in regular expressions.

   > **Note**
   >
   > PDC does not validate the expressions entered in the fields.

4. Click **Save**.

   The filter is added to the table.

Related Topics

Filter Section

Adding an Existing Chargeshare Filter

To add an existing filter to the chargeshare:

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1. Click the **Search** icon in the table.
2. In the Search for Filters dialog box, search for the chargeshare filters to include in the chargeshare.
3. In the Results table, select the filter and click **OK**.

   The filter is added to the table.

Related Topics

Search for Filters Dialog Box

Configuring Chargeshare Triggers

A chargeshare trigger defines the conditions for the chargeshare to be applied. By default, a chargeshare is always applied.

To configure a chargeshare trigger:

1. In the Rule Details section, click the link in the **Trigger** field.

   The Trigger section appears and displays the default trigger information.
2. Do any of the following:
   - Add a new chargeshare trigger. See "Adding a New Chargeshare Trigger".
   - Search for an existing chargeshare trigger to add to the ChargeShare. See "Adding an Existing Chargeshare Trigger".
   - Edit the trigger conditions. In the Trigger Details section, click **Add** or **Delete** icon in the table to add or delete trigger conditions.

Related Topics

Trigger Section

Adding a New Chargeshare Trigger

To add a new chargeshare trigger:

1. In the Trigger section, click **New**.
2. Enter a unique name and description for the new trigger.
3. In the Trigger Details section, click the **Add** icon in the table.

   A row is added to the table.
4. In the **Expression** column, click the expression link.

   The Expression Builder dialog box appears.
5. From the **Expression Element** list, select an expression for the trigger condition.

   PDC prompts you for additional element information depending on the expression element that you select.

   You can add more elements to the expression by entering standard arithmetic operators, decimal constants, and other expressions in the **Expression** field.
6. Click **OK**.
7. From the **Operator** list, select an operator for the trigger condition.
8. In the **Value** column, enter a value for the trigger condition.

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Add additional elements to the trigger as needed.

Related Topics

Trigger Section

Expression Builder Dialog Box

Adding an Existing Chargeshare Trigger

To add an existing chargeshare trigger:

1. In the Trigger section, click **Search**.

   The Search for Triggers dialog box appears.
2. Search for triggers to add to the chargeshare.
3. In the Results table, select the chargeshare trigger, and click **OK**.

   The chargeshare trigger information appears in the Trigger section.

Related Topics

Search for Triggers Dialog Box

Adding a New Chargeshare Rule

To add a new ChargeShare rule:

1. From the **ChargeShare Actions** list, select **Add Rule**.

   The rule is added as a subtab of the ChargeShare tab with default filter and trigger.

Related Topics

Configuring Chargeshare Rules

Setting Up Pricing for a Chargeshare

Chargeshare pricing specifies which balances are impacted by the chargeshare and how they are impacted.

After you add a chargeshare to the chargeshare offer, you set up pricing for each rule in a chargeshare.

Perform the following tasks to set up a new price for a chargeshare:

1. Specify how quantity ranges are selected. See "Selecting Quantity Ranges".
2. (Optional) Add quantity ranges to vary charge sharing based on different levels of charge or quantity. See "Adding Quantity Ranges to Chargeshare Pricing".
3. Configure balance impacts. See "Adding Balance Impacts for Chargeshare Pricing".

Selecting Quantity Ranges

A chargeshare rule specifies charge share amounts based on a configured value, called the quantity range expression. For example, the value can be the charge for the event, the quantity used by an event, or a balance independent of the event. This value is used to select one or more quantity ranges that contain the charge share amount. In addition to configuring this

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value, you need to specify how it is used to select one or more ranges by picking the Selection Type.

To specify which quantity ranges to use:

1. In the Pricing Details section of the Rule Details section, click the default value for the quantity range expression (Charge) in the following sentence:

   To select quantity ranges, evaluate the *Charge* **and** *Distribute Value Across Applicable Quantity Ranges*.

   The Expression Builder dialog box appears.
2. Use the expression builder to configure the expression to evaluate for quantity range selection. For example, this value can be the charge of the event, the quantity used by the event, or a balance independent of the event.
3. Click **OK**.
4. Select one of the following options from the quantity range selection type list:
   - **Pick the quantity range containing the value:** Selects a quantity range that contains the value of the quantity range expression.
   - **Distribute value across applicable quantity ranges:** Selects all quantity ranges that overlap the value of the quantity range expression.

Related Topics

Pricing Details Section

Expression Builder Dialog Box

Adding Quantity Ranges to Chargeshare Pricing

Use quantity ranges in chargeshare pricing to configure different balance impacts for different value range, for example, the quantity used by the event or the charge of the event.

To add a quantity range to chargeshare pricing:

1. In the Pricing Details section of the Rule Details section, click the **Add Quantity Range** icon:

   The Add Quantity Range dialog box appears.
2. In the **Starting At** field, enter the starting value for the range.

   PDC automatically generates an end value for the range based on the existing quantity ranges.

   For example, if you specify 500, PDC creates the following ranges:
   - 0 – 500
   - 500 – No maximum

   If you then create another quantity range with a start value of 250, PDC creates the following ranges:
   - 0 – 250

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- 250 – 500
- 500 – No maximum

3. Click **OK**.

   A Pricing table for the range is added.

4. Configure the balance impacts for this range. See "Adding Balance Impacts for Chargeshare Pricing".

Related Topics

Pricing Details Section

Modifying Quantity Ranges in Chargeshare Pricing

To modify the quantity range in chargeshare pricing:

1. In the Pricing Details section of the Rule Details section, click the link in the **Quantity Range** field above the Pricing table for which you want to change the range.

   The Edit Quantity Range dialog box appears.

2. Modify the **Start** value, the **End** value, or both values.

   To modify the start value (except for the first quantity range), change the end value of the quantity range that precedes it.

   You cannot enter an end value that includes the entire following quantity range. Instead, to extend a range beyond the following range, first delete the following range. See "Deleting Quantity Ranges".

   By default, the last quantity range has no maximum end value. To specify an end value, select **Expression** and use a expression to specify the end value.

   PDC adjusts the start and end values of the preceding and following quantity ranges accordingly.

3. Click **OK**.

Related Topics

Pricing Details Section

Deleting Quantity Ranges

Deleting a quantity range also deletes the pricing configured for it.

To delete a quantity range:

1. Go to the Rule Details section.
2. Click the **Delete Quantity Range** icon above the appropriate Pricing Details table:

   A confirmation message appears.

3. Click **OK**.

   The quantity range and the pricing configuration is removed from the pricing.

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If you deleted a middle range, PDC automatically adjusts the end value of the previous quantity range.

Related Topics

Rule Details Section

Adding Balance Impacts for Chargeshare Pricing

Balance impacts define how a chargeshare affects a specified balance element in an account. Chargeshare pricing can contain one or more balance impacts.

To add balance impacts to chargeshare pricing:

1. In the Pricing Details section of the Rule Details section, do one of the following:

   To add a debit or credit balance impact, click the **Add Balance Impact** icon:

   To add a counter balance impact, click the **Add Counter** icon:

   A row for the new balance impact is added to the table.
2. In the **Impact** column, select the type of impact to debit or credit a balance, or to increment or decrement a counter.
3. In the **Balance Element** column, select the currency or noncurrency balance element to debit or credit.
4. In the **Amount** column, enter the percentage, scaled-amount, or a fixed value.

   This value is applied towards the amount that is shared.
5. Click in the **Per Unit** column, and select the option for how to apply the value in the **Amount** field towards the amount that is shared.

   For instance, you can select to apply the value as the percentage or as fixed shared amount.
6. Click the link in the **What to Share** column, and select an expression in the Expression Builder dialog box.

   The value of the expression determines the amount that is shared, such as total charge or quantity used.
7. Click in the **Amount is Valid** column, and select the validity period of the balance impact.

   For debit balance impacts, this column is not applicable.
8. In the **Apply To** column, select the balance to apply the chargeshare to.
   - **User Balance**: The balance of the account or service that generates the event.
   - **Sharer Balance**: The balance of the account or service that owns the chargeshare.
9. In the **Tax Code** column, select the name of the tax code to apply.

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10. In the **GLID** column, select the General Ledger ID to associate with the balance impact.

Related Topics

Pricing Details Section

Identifying the Components That Use a Shared Chargeshare

To identify the components that use a shared chargeshare:

- In the Rule Details section of the chargeshare, click **Used By**.

  The **Used By** button is available only when the chargeshare is used by another component.

  The Used By page appears. This page provides an expandable hierarchical view of all the components that use the chargeshare.

Related Topics

Adding an Existing Chargeshare

Modifying Pricing without Inadvertently Affecting Other Components

When you modify pricing in a chargeshare used by multiple components, PDC enables you to specify which of those components you want your changes to affect.

To specify which components are affected when you modify pricing in a chargeshare:

1. In the Pricing table in the ChargeShare Rule Details section, click the **Change Price** icon:

   The Change Price dialog box appears.
2. Select an option to indicate the scope of the price change:
   - **This chargeshare wherever it is used**

     Affects every component that uses this chargeshare.
   - **The current offer only**

     Affects only this chargeshare offer. Other components that use the chargeshare are not affected.
3. Click **OK**.

Related Topics

Pricing Table

Change Price Dialog Box

Adding Date Ranges to a Chargeshare

The chargeshare date range is the period when a chargeshare is effective.

You can create multiple revisions of a chargeshare for different date ranges.

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To add a date range to a chargeshare:

1. Go to the chargeshare tab for which to add a date range.
2. From the **ChargeShare Actions** list, select **New Date Range**.

   The New Date Range dialog box appears.
3. Enter the start date for the new range.

   PDC automatically calculates the end date based on the existing date ranges.
4. Click **OK**.

   The new date range is added to the chargeshare. Its rules and the data they contain are copied from the preceding date range.

Related Topics

New Date Range Dialog Box

Modifying or Deleting Date Ranges in a Chargeshare

To modify or delete a date range in a chargeshare:

1. From the **Date Range** list, select **Manage**.

   The Manage Date Ranges dialog box appears.
2. Select the date range then do one of the following:
   - To edit the date range, click the **Edit** icon.

     In the Edit Date Range dialog box, edit the start and end dates or use the date selector to select a date, and click **OK**.
   - To delete a date range, click the **Delete** icon. Deleting a date range also deletes the pricing configured for that date range.

     A confirmation message appears. Click **Yes**.
3. Click **OK**.

Related Topics

Manage Date Ranges Dialog Box

Edit Date Range Dialog Box

Changing Chargeshare Details

You can change the following in an existing chargeshare:

- The name of the chargeshare

  If you do not enter a name for a chargeshare when you create it, a default name is given.
- When to stop chargesharing
- The resource consumption order
- The taxation settings

To edit a chargeshare's details:

1. Open the chargeshare offer that contains the chargeshare.

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2. If the chargeshare offer is in read-only mode, click **Edit** in the chargeshare offer toolbar.
3. In the ChargeShares section, click the appropriate chargeshare tab.
4. From the **ChargeShare Actions** list, select **ChargeShare Details**.

   The ChargeShare Details dialog box appears.
5. Change the value of one or more fields.
6. Click **OK**.
7. Click **Save and Done**.

Related Topics

ChargeShare Details Dialog Box

Removing a Chargeshare from a Chargeshare offer

To remove a chargeshare from a chargeshare offer:

1. Open the chargeshare offer that contains the chargeshare.
2. In the ChargeShares section, click the appropriate chargeshare tab.
3. From the **ChargeShare Actions** list, select **Remove ChargeShare**.
4. In the Confirmation dialog box, click **OK**.

   The chargeshare is removed from the chargeshare offer, but it is not deleted from PDC. See "Deleting Pricing Components" for information about deleting chargeshare offers from PDC.

Create Chargeshare Offer Page Reference

Use the **Create ChargeShare offer** page to create chargeshare offers and the chargeshares and pricing they contain.

For a description of the fields, see:

- General Information Section
- ChargeShares Section

General Information Section

Use the General Information section to provide general information and settings for the chargeshare offer.

For a description of the subsections in General Information, see:

- Product Specification Attributes Subsection
- Offer Settings Subsection

Field	Description
Name, Description	Enter a unique name and a description for the chargeshare offer.
Applicable To	Select the service for which you want to create the chargeshare offer.

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Field	Description
Phase	This field is read-only and specifies the status of the new chargeshare offer.

Product Specification Attributes Subsection

Use the Product Specification Attributes subsection to provide values for any product specification attributes configured in XML template files. The fields available in this subsection depend on what is configured in the XML template file.

See "About Extended Attributes for Pricing Components" in *PDC Creating Product Offerings* for more information.

Offer Settings Subsection

Field	Description
Available	Set the **Start** and **End** dates to specify the period when the chargeshare offer is valid. By default, the ChargeOffer is valid as soon as you save it, and it never expires. To set a specific start date and time, deselect **Immediately**. To set a specific end date and time, deselect **Never**. The start date is included in the validity period, but the end date is not. For example, if the start date is May 1 and the end date is May 10, the offer is valid from May 1 through May 9. See "Setting Validity Periods".

Related Tasks

Specifying General Information and Settings for a Chargeshare Offer

ChargeShares Section

Use the ChargeShares section to add chargeshares and chargeshare rules to the chargeshare offer.

When a chargeshare is added to a chargeshare offer, it appears in a tab in the ChargeShares section. The tab contains two sections: Rule Details and Pricing Details.

Add ChargeShare List

List Item	Description
Add New ChargeShare	Select to create a chargeshare to add to the chargeshare offer. See "Adding a New Chargeshare".
Add Existing ChargeShare	Select to add an existing chargeshare to the chargeshare offer. See "Adding an Existing Chargeshare".

Used By Button

Click this button to display a hierarchical view of all the components that use the chargeshare.

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ChargeShare Actions List

List Item	Description
Add Rule	Select this item to add a rule to the chargeshare. See "Configuring Chargeshare Rules".
ChargeShare Details	Click this item to display details about the chargeshare. See "Changing Chargeshare Details".
Remove ChargeShare	Click this item to remove the chargeshare from the chargeshare offer. See "Removing a Chargeshare from a Chargeshare offer".

Create ChargeShare Dialog Box

Use the Create ChargeShare dialog box to specify information for the chargeshare that you want to create.

Field	Description
ChargeShare Category	Select the type of event for which you want to create the chargeshare: • **Recurring**: Event that occurs on a fixed interval, such as a monthly subscription fee, that is not generated or affected by usage. • **Usage**: Event for service usage, such as telephone calls or Internet sessions. • **One Time**: Event for one-time charge, such as a setup fee.
ChargeShare Type	Select the event for which you want to create the chargeshare.
Pricing Profile	Select the pricing profile for chargeshare.
Name	(Optional) Enter a unique name for the chargeshare. If you do not specify a name, PDC automatically generates a default name.
Stop ChargeSharing	Specify whether to apply the chargeshare after it has been canceled or inactivated to events that occurred prior to the chargeshare cancellation or inactivation. • **Never**: Never include inactive or canceled chargeshares. • **When Inactive**: Include inactive chargeshares but not canceled chargeshares. • **When Cancelled**: Include canceled chargeshares but not inactive chargeshares. • **When Inactive or Cancelled**: Include both inactive and canceled chargeshares.

Taxation Section

Use the Taxation section to specify how to apply taxes to the chargeshare.

Field	Description
Option	Specifies how to apply taxes: • **No Tax**: Does not apply taxes. • **Use Tax Code**: Applies the specified tax code. • **Use Tax Selector**: Applies the specified tax selector.
Tax Code or **Tax Selector**	Specifies the name of the tax code or tax selector to apply. **Note:** If you have selected **No Tax**, this field is not displayed.

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Related Tasks

Adding a New Chargeshare

Search for ChargeShares Dialog Box

Use the Search for ChargeShares dialog box to search for existing chargeshares to include in the chargeshare offer.

Field	Description
Pricing Component	Specifies the pricing component to search for. This field displays **ChargeShare**.
Profile	(Optional) Select the pricing profile associated with the chargeshare you want to search. To find chargeshares associated with any profile, select **Any**.
Name	(Optional) Enter a full or partial name of the chargeshare to search for. Select an operator from the operator list, and then enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the chargeshares that meet the search criteria. Select the chargeshares to include in the chargeshare offer and click **OK**.

Field	Description
Name	Lists the chargeshares that match the search criteria.
Description	Displays a description for each chargeshare.
Phase	Displays the status of the chargeshare: • **Draft:** The chargeshare is only visible to the user. • **Promoted:** The chargeshare has been validated and is visible for other users to use.

Related Tasks

Adding an Existing Chargeshare

Related Topics

Searching for Pricing Components

New Date Range Dialog Box

Use the New Date Range dialog box to add a new date range for the chargeshare.

In the **Date Range Effective** field, enter the start date for the new date range or use the date selector to select a date.

PDC automatically calculates the end date based on the existing date ranges in the chargeshare.

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Related Tasks

Adding Date Ranges to a Chargeshare

Manage Date Ranges Dialog Box

Use the Manage Date Ranges dialog box to add, change, or delete date ranges in a chargeshare. The dialog box contains a table that lists all the date ranges in a chargeshare.

- To add a date range, click the **Add** icon.

  In the New Date Range dialog box, enter the new date.
- To change a date range, select the appropriate range and then click the **Edit** icon.

  In the Edit Date Range dialog box appears, edit the start and end dates.
- To delete a date range, select the appropriate range and then click the **Delete** icon. Deleting a date range also deletes the pricing configured for that date range.

  A confirmation message appears. Click **OK**.

Related Tasks

Modifying or Deleting Date Ranges in a Chargeshare

Edit Date Range Dialog Box

Use the Edit Date Range dialog box to change the start and end dates for a date range in a chargeshare.

Field	Description
Start	Enter the new start date or use the date selector to select a date. (For the first date range only) Deselect **Immediately**, and then enter a date or use the date selector to select a date.
End	Enter the new end date or use the date selector to select a date. (For the last date range only or when only one date range exists) Deselect **Never Ends**, and then enter a date or use the date selector to select a date.

Related Tasks

Modifying or Deleting Date Ranges in a Chargeshare

Rule Details Section

Use the Rule Details section to configure the chargeshare rules.

For a description of the fields, see:

- Filter Section
- Trigger Section
- Pricing Details Section

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Field	Description
Filter	Click the link in this field to configure one or more filters for the chargeshare. A chargeshare filter defines the parts of a charge that are subject to charge sharing.
Trigger	Click the link in this field to configure a trigger for the chargeshare. A chargeshare trigger enables you to set conditions that must be met for the chargeshare to be applied.

Filter Section

A chargeshare filter defines the parts of a charge that are subject to charge sharing. A chargeshare can have multiple filters. A charge must satisfy the criteria in at least one of those filters to be eligible for the chargeshare. By default, all charges that impact a currency balance are subject to the chargeshare.

Use the table in the Filter section to add chargeshare filters to the chargeshare. The table displays the name and description of each filter used by the discount.

Click the **Add** icon to add a new filter to the chargeshare. In the Filter Details subsection, set the values for the fields that you want to use to define the filter.

In the filter definition, regular expressions can be entered in the following fields:

- Time Period
- Usage Class
- Usage Type
- Service Class
- Service Type

To match any value, use .* (dot asterisk) or leave the field empty. Do not use only an asterisk (*) in regular expressions.

> **Note**
>
> PDC does not validate the expressions entered in the fields.

Click the **Search** icon to search for existing filters and add to the chargeshare.

Search for Filters Dialog Box

Use the Search for Filters dialog box to search for existing chargeshare filters to include in the chargeshare.

Field	Description
Pricing Component	Displays the pricing component to search for. This field displays **Filters**.
Profile	Displays the pricing profile for chargeshare.

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Field	Description
Name	(Optional) Enter a full or partial name of the chargeshare filter to search for. Select an operator from the operator list and enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results tables lists the chargeshare filters that meet the search criteria. Select a chargeshare filter and click **OK**.

Field	Description
Name	Lists the chargeshare filters that match the search criteria.
Description	Displays a description for each chargeshare filter.
Phase	Displays the status of the chargeshare filter. • **Draft:** The chargeshare filter is only visible to the user. • **Promoted:** The chargeshare filter has been validated and is visible for other users to use.

Related Tasks

Configuring Chargeshare Filters

Related Topics

Searching for Pricing Components

Trigger Section

Use the Trigger section to define the trigger conditions that must be met before the chargeshare is applied.

Field or Column	Description
Name, Description	Enter a name and a description for the chargeshare trigger.
Expression	Select a trigger expression by clicking the link in the cell and then selecting an expression in the Expression Builder dialog box. You can add more elements to an expression by entering standard arithmetic operators, decimal constants, and other expressions in the **Expression** field.
Operator	Select an operator for the trigger condition.
Value	Enter a value for the trigger condition.

Related Tasks

Configuring Chargeshare Triggers

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Search for Triggers Dialog Box

Use the Search for Triggers dialog box to search for existing chargeshare triggers to add to the chargeshare.

Field	Description
Pricing Component	Displays the pricing component to search for. This field displays **Trigger**.
Profile	Displays the pricing profile for chargeshare.
Name	(Optional) Enter a full or partial name of the chargeshare trigger to search for. Select an operator from the operator list and enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the chargeshare triggers that meet the search criteria. Select a chargeshare trigger and click **OK**.

Field	Description
Name	Lists the chargeshare triggers that match the search criteria.
Description	Displays a description for each chargeshare trigger.
Phase	Displays the status of the chargeshare trigger: • **Draft:** The chargeshare trigger is only visible to the user. • **Promoted:** The chargeshare trigger has been validated and is visible for other users to use.

Related Tasks

Configuring Chargeshare Triggers

Related Topics

Searching for Pricing Components

Pricing Details Section

Use the Pricing Details section to configure pricing for the chargeshare rule.

For each chargeshare rule, you configure pricing to specify which balances are impacted by the rule and how they are impacted.

Field	Description
Quantity Range Expression	Click to define the expression to evaluate the quantity range selection. The **Quantity Range Expression** is the link specified in the following sentence in the Pricing Details section: **To select quantity ranges, evaluate the value of** *Charge* and *Distribute Value Across Applicable Quantity Ranges*.

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Field	Description
Selection Type	Select one of the following options to specify how to select one or more quantity ranges: • **Pick the quantity range containing the value:** Selects the quantity range that contains the value of the **Quantity Range Expression**. • **Distribute value across applicable quantity ranges:** Selects the quantity ranges that overlap the value of the **Quantity Range Expression**.
Add Quantity Range 	Click to add a quantity range to pricing.
Change Price 	Click to specify the components that get affected by the price change.
Add Balance Impact 	Click to add a balance impact to the pricing.
Add Counter 	Click to add a counter balance impact to the pricing.
Pricing Details table	Enter data to specify which balances are impacted and how they are impacted. See "Pricing Table" for a description of the fields.

Related Tasks

Adding Quantity Ranges to Chargeshare Pricing

Adding Balance Impacts for Chargeshare Pricing

Pricing Table

Each row in the Pricing Details table represents a balance impact for the event associated with the chargeshare.

Column	Description
Impact	Select whether to credit or debit a balance or to increase or decrease a counter.

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Column	Description
Balance Element	Select the currency or noncurrency balance element to debit or credit.
Amount	Enter the percent, scaled-amount, or a fixed value. This amount is applied to the shared amount.
Per Unit	Click the link to display the Per Unit dialog box, and then select one of the following options to specify how to apply the value in the **Amount** field to the amount that is shared. • **Percent of:** Applies the value in the **Amount** field as a percentage of the charge. For example, if **Amount** is 20, the charge share is 20% of the charge. • **For every** *x* **unit:** Applies the value in **Amount** field per unit specified. Select **Round Down** to round the **What to Discount** value down to the nearest specified unit, otherwise the value is not rounded. • **Fixed:** Applies the value in **Amount** field as a flat charge share amount.
What to Share	Click the link and select an expression in the Expression Builder dialog box. This expression determines the amount that is shared.
Amount Is Valid	Click the link to display the Amount Is Valid dialog box. Select the validity period of the chargeshare balance impact. For debit balance impacts, this field is not applicable.
Apply To	Select the balance to apply the chargeshare to: • **User Balance:** The balance of the account or service that generates the event. • **Sharer Balance:** The balance of the account or service that owns the chargeshare.
Tax Code	Select the name of the tax code to apply.
GLID	Enter the General Ledger ID to associate with the balance impact.

Related Tasks

Adding Balance Impacts for Chargeshare Pricing

Change Price Dialog Box

Use the Change Price dialog box to indicate the scope of a price change.

The available options depend on the context from where the dialog box is displayed.

Field	Description
This Price Change Will Affect	Select one of the following options to indicate the scope of the price change: • **This chargeshare wherever it is used** Affects every component that uses this chargeshare. • **The current offer only:** Affects only this chargeshare offer. Other components that use the chargeshare are not affected.

Related Tasks

Adding an Existing Chargeshare

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ChargeShare Details Dialog Box

Use the ChargeShare Details dialog box to view or edit settings for the chargeshare.

Field	Description
ChargeShare Category	Displays the category of event to which the chargeshare applies: • **Recurring:** Event that occurs on a fixed interval, such as a monthly subscription fee, that is not generated or affected by usage. • **Usage:** Event for service usage, such as telephone calls or Internet sessions. • **One Time:** Event for one-time charge, such as a setup fee.
ChargeShare Type	Displays the type of event to which the chargeshare applies.
Pricing Profile	Displays the pricing profile for chargeshare.
Name	Displays the name for the chargeshare. If you do not specify a name, PDC automatically generates a default name.
Stop ChargeSharing	Displays whether to apply the chargeshare after it has been canceled or inactivated to events that occurred prior to the chargeshare cancellation or inactivation. • **Never:** Never include inactive or canceled chargeshares. • **When Inactive:** Include inactive chargeshares but not canceled chargeshares. • **When Cancelled:** Include canceled chargeshares but not inactive chargeshares. • **When Inactive or Cancelled:** Include both inactive and canceled chargeshares.
Resources Consumption Order	Displays whether to consume noncurrency resources for the chargeshare in order of earliest expiry, or in order of any rules configured. This option is only available for ECE-enabled systems. • **Earliest Expiry**: Consume noncurrency resources according to which resource expires first. For example, if the customer is subscribed to one chargeshare that grants minutes that expire monthly and another that grants minutes that expire yearly, the minutes expiring monthly should be consumed first. If two or more resources have the same validity dates, the rule order will be used. • **Rule Order**: Consume balances according to the configured rules, without taking validity into account.

Taxation Section

Use the Taxation section to specify how to apply taxes to chargeshares.

Field	Description
Option	Displays how to apply taxes: • **No Tax**: Does not apply taxes. • **Use Tax Code**: Applies the specified tax code. • **Use Tax Selector**: Applies the specified tax selector.
Tax Code or **Tax Selector**	Displays the name of the tax code or tax selector to apply. **Note:** If you have selected **No Tax**, this field is not displayed.

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Related Tasks

Changing Chargeshare Details

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7

Subscription Terms

Subscription terms specify a contract's commitment period, such as 1 month, 1 year, or 2 years.

Terms also specify whether customers:

- Can cancel the contract before the commitment period ends
- Are charged an early termination fee for canceling early
- Have a grace period, during which the early termination fee is waived
- Have their contracts renewed automatically when the commitment period ends
- Have a minimum contract period, after which penalty will be charged upon cancellation

For example, a term might specify a 1-year commitment period, allow early cancellation with a $250 early termination fee, and renew automatically with the same terms.

BRM includes standard terms that you can use for your contracts or use as examples when creating your own terms.

Creating a Subscription Term

To create a subscription term:

1. In the Pricing section of the navigation pane, under **Terms**, click **Create Terms**.

   The **Create Terms** page appears.
2. Enter a name.
3. For **Commitment Period**, click the length of the commitment: **Monthly**, **12 Months**, **24 Months**, **36 Months**, or **Custom**.
4. For **Early Termination of Contract**, specify whether to allow early cancellation of the contract and whether to apply an early termination fee:
   - **Allowed, No Penalty**: Contracts can be canceled early, and customers will not be charged an early termination fee.
   - **Allowed, with Penalty**: Contracts can be canceled early, but customers will be charged an early termination fee for doing so. To specify the amount to charge for early termination, see "Configuring Early Termination Fees".
   - **Not Allowed**: Contracts cannot be canceled early.
5. From **Auto Renew**, select whether to automatically renew the contract, and which terms to renew with.
6. Click **Finish**.

   The overview page for the subscription term appears.

Related Topics

Create Terms Page Reference

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Configuring Early Termination Fees

You can charge your customers an early termination fee if they cancel their contract early. You can use this fee to recoup the cost of equipment or discounts given to customers at the start of a contract; for example, recoup the cost of a cell phone that was provided for free with a wireless service subscription. You can also charge the early termination fee along with the balance remaining in the customer's contract.

An early termination fee can be one of the following:

- A flat fee, such as 100 US dollars or 75 euros.
- A fee that is reduced in equal amounts over the contract's commitment period. For example, if the early termination fee is $60 and the commitment period is 1 year, the fee would be reduced by $5 each month. A customer canceling after 1 month would pay $55, and a customer canceling after 8 months would pay $20.
- The balance remaining in the customer's contract. For example, in a 1-year commitment period with a $50 monthly charge, you would charge $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.
- A flat fee or a fee that is reduced in equal amounts over the contract's term, along with the balance remaining in the customer's contract. For example, in a 1-year commitment with a $100 early termination fee and a $20 monthly charge, you would charge a flat fee of 100 US dollars, and $20 for each month remaining in the contract. A customer canceling with 3 months remaining would pay $160.

You can also add a grace period, allowing your customers to cancel a contract within the first few days or weeks after purchase without incurring the early termination fee.

To apply an early termination fee:

1. Under **Early Termination of Contract**, select whether to apply a flat fee, a fee that reduces over time, or the remaining contract balance. You can also apply both an early termination fee and the remaining contract balance.
    - To apply a flat fee, select **Charge an Early Termination Penalty** and then enter the penalty amount such as 200 US Dollars or 75 Euros.
    - To apply a fee that reduces over time, select **Charge an Early Termination Penalty**, enter the penalty amount such as 100 Euros, and then select **Reduce penalty in equal amounts, based on time served in the contract**.
    - To apply the remaining contract balance, select **Charge Remaining Balance of contract**.
    - To set a minimum contract period before allowing your customers to cancel their contract, select **Minimum contract period required before cancellation is allowed**.
2. To add a grace period during which no early termination fee is applied, select **No Penalty during a grace period** and then enter values for the length of the grace period, such as **10 days** or **1 month**.
3. In **Penalty Revenue G/L ID**, select the revenue general ledger ID to associate with the early termination fee.

    If you do not select a general ledger ID, the early termination fee is distributed across deliverables in the contract only if deliverable-based revenue recognition is enabled.

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Related Topics

Early Termination of Contract

Creating a Subscription Term

Create Terms Page Reference

Use the **Create Terms** page to create a subscription term and define the length of the commitment period, whether to apply an early termination fee for canceling the contract early, and whether to automatically renew the contract at the end of the commitment period.

For a description of the fields, see:

- Commitment Period
- Early Termination of Contract
- Auto Renew

Commitment Period

For **Commitment Period**, click one of these options to specify the length of the commitment period:

- **Monthly**
- **12 Months**
- **24 Months**
- **36 Months**
- **Custom**: Enter the number of days, months or years.

Related Topics

Creating a Subscription Term

Early Termination of Contract

For **Early Termination of Contract**, specify whether to allow early cancellation of the contract and whether to apply an early termination fee. Select one of these options:

- **Allowed, No Penalty:** Contracts can be canceled early, and your customers will not be charged an early termination fee.
- **Allowed, with Penalty:** Contracts can be canceled early, but your customers will be charged an early termination fee for doing so. When you click this option, the **Early Termination of Contract** area displays additional fields. See "Allowed, with Penalty Option".
- **Not Allowed:** Contracts cannot be canceled early.

Allowed, with Penalty Option

Use the fields associated with the **Allowed, with Penalty** option to configure how much to charge your customers if they cancel their contract early.

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Field	Description
Charge an early termination penalty	Select to apply a flat fee or a fee that is reduced in equal amounts over the contract's term.
Charge remaining balance of contract	Select to apply a fee equal to the balance remaining in the customer's contract.
Penalty amount	Enter the amount and currency of the early termination fee, such as 100 US Dollars or 240 Euros. This field appears only if you selected **Charge an early termination penalty**.
Reduce penalty in equal amounts, based on time served in the contract	Select to reduce the early termination fee by equal amounts over the contract's term. For example, for a 1-year commitment period with an early termination fee of $120, the fee would be reduced by $10 each month. This field appears only if you selected **Charge an early termination penalty**.
No Penalty during a grace period	Select to allow your customers to cancel a contract within the first few days or weeks after purchase without incurring the early termination fee. If you select this option, you must also specify the length of the grace period.
Penalty Revenue G/L ID	Select the revenue general ledger ID to associate with the early termination fee. To distribute the fee across the deliverables in the contract, select **Use revenue G/L IDs from contract deliverables**.
Minimum contract period required before cancellation is allowed	Select to set a minimum contract period before allowing your customers to cancel their contract.

Related Topics

Configuring Early Termination Fees

Auto Renew

Use **Auto Renew** to specify whether the contract renews automatically at the end of the commitment period. For example, you can create a subscription term that automatically renews with the same 1-year commitment or with a different monthly commitment. Select one of the following:

- **No:** The contract is not renewed at the end of the commitment period.
- **Yes, renew using:** At the end of the commitment period, the contract automatically renews using the subscription term you select. You can select the same term or a different term.

Related Topics

Creating a Subscription Term

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8

Bundles

A bundle is a set of charge offers, discount offers, or both. Bundles allow you to group offers that you want to sell together.

To work with bundles, see the following topics:

- Creating a Bundle
- Specifying Bundle General Information and Settings
- Adding Terms to a Bundle
- Adding an Offer to a Bundle
- Defining Dependencies for Bundles
- Defining Transition Rules for Bundles
- Create Bundle Page Reference

For overview information, see "About Creating Product Offerings" in *PDC Creating Product Offerings*.

Creating a Bundle

To create a bundle:

1. In the Pricing section of the navigation pane, under **Bundling**, click **Create Bundle**.

   The **Create Bundle** page appears.
2. Specify general information and settings for the bundle. See "Specifying Bundle General Information and Settings".
3. Optionally, add subscription terms to the bundle. See "Adding Terms to a Bundle".
4. Add charge offers or discount offers to the bundle. See "Adding an Offer to a Bundle".
5. Define prerequisites and mutually exclusive relationships between bundles. See "Defining Dependencies for Bundles ".
6. Define rules for transitioning from one bundle to another. See "Defining Transition Rules for Bundles ".
7. Click **Finish**.

   The Bundle overview page appears.

Related Topics

Create Bundle Page Reference

Specifying Bundle General Information and Settings

To specify bundle settings:

1. In the General Information section, enter a name and description.

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2. From the **Applicable To** list, select a service to associate with the bundle.
3. Expand the Product Specification Attributes subsection.
4. If any product specification attributes were defined for bundles in an XML template file, set their values.
5. Expand the Bundle Settings subsection.
6. (Optional) To immediately generate a bill for any purchase fees when the customer purchases the bundle, select **Bill on Purchase**.
7. (Optional) To synchronize the start date of all balance elements to the date of first usage when one of them is activated for the first time, select **Align Balance Validities on First Usage**.
8. (Optional) To activate *all* charge offers in a bundle upon first usage of any charge offer in the bundle, select **Activate all other offers in addition to first usage offer**.

> **Note**
>
> The **Activate all others in addition to first usage offer** overrides the start date and first usage settings in a charge offer or discount offer.

9. (Optional) To allow customer service representatives (CSRs) to change the default price and effective time period of a charge offer or a discount offer for a customer account, select **CSR Allowed to Customize Bundle**.
10. (Optional) To set the start date when customers can start purchasing the bundle and the end date when the bundle can no longer be purchased, in the **Purchase Period** group, select the appropriate options. See "Setting Validity Periods" for information about setting validity period.

Related Topics

General Information Section

Creating a Bundle

Adding Terms to a Bundle

If you add a subscription term to a bundle, it is used only if the bundle is optional in a package. If the bundle is required in a package, the bundle's terms are overridden by the package's terms.

To add a subscription term to a bundle:

1. Expand the Terms section.
2. From the **Name** list, select the subscription term to associate with the bundle. If you do not want to add a term, select **No Commitment**.

   The section displays details about the term, such as its commitment period and whether it allows early cancellation.

Related Topics

Terms Section

Creating a Bundle

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Subscription Terms

Adding an Offer to a Bundle

To add an offer to a bundle:

1. In the Manage Bundle Content section, click the **Add** icon in the table.

   The Search for Offers dialog box appears.
2. Search for the offers to add to the bundle. See "Searching for Pricing Components".
3. In the Results table, select the offers to add and click **OK**.

   The offers are added to the table in the Manage Bundle Content section, and the Offer Customization subsection appears.
4. (Optional) Customize the offer to change its effective period and other settings. See "Customizing an Offer in a Bundle".

Related Topics

Search for Offers Dialog Box

Creating a Bundle

Customizing an Offer in a Bundle

After adding an offer to a bundle, you can customize that offer.

To customize an offer in a bundle:

1. In the Manage Bundle Content section, select the charge or discount offer in the table. The Offer Customization subsection displays the details of the selected offer.
2. In the **Quantity** field, enter the quantity of the charge offer or discount offer included in the bundle.
3. Select when the offer starts.
   The offer can start immediately, relative to purchase, or on first usage.

   Do not select **First Usage** for charge offers that do not have any usage charges. If you do so, the charge offer will never be activated.

   If you select **Relative to Purchase**, enter a time interval.
4. Select when the offer ends and is no longer available for purchase.
   If you select **Relative to Start**, enter a time interval.
5. Select **Offer is inactive when purchased** to make the offer inactive when it is purchased. Then, enter an inactive reason code. You can activate the offer for a customer after the bundle is purchased.
6. Select how the offer's cycle is aligned when the offer is suspended and then reactivated. Select **Renewal Mode** to reset the cycle alignment based on the reactivation date rather than the original purchase date (also depends on the settings for cycle alignment in the Create Charge Offer page and the Create Charge dialog box.)
7. From the **Proration** list, select how the offer calculates prorated cycle fees:
   - **Not Selected**: Prorated cycle charges or discounts are calculated according to the system-wide setting.

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- **Based on a 30-day month**: Prorated cycle charges or discounts are calculated based on a 30-day month, regardless of the number of days in the billing cycle.
- **Based on the number of days in the month**: Prorated cycle charges or discounts are calculated based on the actual number of days in a particular cycle, such as 28 days in February, 31 days in March, and 30 days in April.

8. Select **This is an add-on charge offer** to make this an add-on charge offer. This allows customers to purchase the charge offer with the bundle or at a later time.
   When selected, also specify how to align the add-on charge offer's validity dates:
   - **Specific charge offer**: Aligns the validity dates with the base charge offer that you specify.
     In the **Align with Offer** field, select the name of the base charge offer.
   - **Earliest expiring charge offer, excluding add-on offers**: Aligns the validity dates with the active charge offer that expires first, excluding any add-on charge offers.
   - **Latest expiring charge offer, excluding add-on offers**: Aligns the validity dates with the active charge offer that expires last, excluding any add-on charge offers.
   - **Earliest expiring charge offer**: Aligns the validity dates with the active charge offer that expires first.
   - **Latest expiring charge offer**: Aligns the validity dates with the active charge offer that expires last.
9. For one-time charges, specify how to handle multiple purchases of the same offer.
   You can specify whether the additional offer is purchased as a new subscription, a replacement of the existing subscription, or an extension of the existing subscription.

   If you select any of the options to extend the old subscription, configure the **Grace Period**. The additional offer must be purchased within the grace period to qualify for the extension.
10. For recurring and usage charges, set the start and end times that determine when the charge is effective:
    a. Select when the cycle and usage charges start.
       The cycle and usage charges can start immediately, relative to purchase, or on first usage.

       If you select **Relative to Purchase**, enter the number of seconds, minutes, hours, days, months, or cycles after purchase that the cycle and usage charges start.

       If **Offer Start** is set to **First Usage**, **Cycle Starts** and **Usage Starts** are also set to **First Usage**.

    b. Select when the cycle and usage charges end.
       If **Offer End** is set to **Relative to Start**, **Cycle Ends** and **Usage Ends** are also set to **Relative to Start**. Enter the number of seconds, minutes, hours, days, months, or cycles after start that the cycle and usage charges end.
11. For recurring, one-time, and usage charges, specify a discount percentage.

Related Topics

Offer Customization Subsection

Adding an Offer to a Bundle

Defining Dependencies for Bundles

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Defining Dependencies for Bundles

You can define the following dependent relationships between bundles:

- **Prerequisite**: Specifies that a service or an account must own a particular bundle to be able to purchase the current bundle. See "Defining a Prerequisite Relationship Between Bundles".
- **Mutually exclusive**: Prevents a service or an account from purchasing a particular bundle if it owns a conflicting bundle. For example, if you set up a mutually exclusive dependency between a Corporate Voice bundle and a Residential Voice bundle, customers who purchase either bundle cannot purchase the other bundle. See "Defining a Mutually Exclusive Relationship Between Bundles ".

  The same bundle cannot be both a prerequisite and a mutually exclusive bundle.

Related Topics

Prerequisite Section

Mutually Exclusive Section

Creating a Bundle

Defining a Prerequisite Relationship Between Bundles

To define a prerequisite relationship between bundles:

1. In the Prerequisite section, click the **Add** icon in the table.

   The Search Bundles for Prerequisite dialog box appears.
2. Search for bundles to add as a prerequisite bundle. See "Searching for Pricing Components".
3. In the Results table, select a bundle and click **OK**.

   The bundle is added to the table in the Prerequisite section.

Related Topics

Search Bundles for Prerequisite Dialog Box

Defining Dependencies for Bundles

Defining a Mutually Exclusive Relationship Between Bundles

To define a mutually exclusive relationship between bundles:

1. In the Mutually Exclusive section, click the **Add** icon in the table.

   The Search Bundles for Exclusivity dialog box appears.
2. Search for bundles to add as a mutually exclusive bundle. See "Searching for Pricing Components".
3. In the Results table, select a bundle and click **OK**.

   The bundle is added to the table in the Mutually Exclusive section.

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Related Topics

Search Bundles for Exclusivity Dialog Box

Defining Dependencies for Bundles

Defining Transition Rules for Bundles

Transition rules are used to upgrade or downgrade a bundle to another bundle. Customers owning bundles associated with a service may transition to other bundles associated with the same service.

When you set up a transition rule, you include the following information:

- The allowable bundles for upgrade or downgrade of the current bundle.
- The validity period when the transition rule becomes effective.
- Which fees to apply to the billing cycle in which the transition occurs: the original bundle's fees, the new bundle's fees, or prorated fees from both bundles.
- Whether to waive any purchase and cancellation fees when the upgrade or downgrade occurs.

To define transition rules for a bundle:

1. In the Transition Rules for Eligible Bundles section, click the **Add** icon in the table.

   The Search Bundles for Transition dialog box appears.
2. Search for the bundles to which the transition rule applies. See "Searching for Pricing Components".
3. In the Results table, select a bundle and click **OK**.

   The bundle is added to the table in the Transition Rules for Eligible Bundles section.

   For each bundle, the table displays the default values for transition type, for validity period, for when new cycle bundle fees start, for purchase fees, and for cancellation fees.
4. Select the transition type.
5. If you want to change the default validity period, click the validity period link. You can update start and end dates in the Edit Validity dialog box.

   See "Setting Validity Periods".
6. Specify when to start the new bundle's cycle fees:
   - **This cycle, in full**: Apply the new bundle's fee this cycle, and fully refund the original bundle's cycle fee.
   - **This cycle, prorated**: Prorate the original and new bundles' cycle fees.
   - **Next cycle**: Apply the original bundle's fee to this cycle, and start the new bundle's fee in the next billing cycle.
7. In the **Waive Fees** column, select or deselect **Purchase** and **Cancel** to indicate whether purchase and cancellation fees should be waived.

Related Topics

Transition Rules for Eligible Bundles Section

Search Bundles for Transition Dialog Box

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Creating a Bundle

Create Bundle Page Reference

Use the **Create Bundle** page to group one or more charge offers and discount offers in a bundle.

For a description of the fields, see:

- General Information Section
- Terms Section
- Manage Bundle Content Section
- Prerequisite Section
- Mutually Exclusive Section
- Transition Rules for Eligible Bundles Section

General Information Section

Use the General Information section to provide general information and settings for the bundle.

For a description of the subsections in General Information, see:

- Product Specification Attributes Subsection
- Bundle Settings Subsection

Field	Description
Name, Description	Enter a unique name and a description for the bundle.
Applicable To	Select a service to associate with the bundle.

Related Tasks

Specifying Bundle General Information and Settings

Product Specification Attributes Subsection

Use the Product Specification Attributes subsection to provide values for any product specification attributes configured in XML template files. The fields available in this subsection depend on what is configured in the XML template file.

See "About Extended Attributes for Pricing Components" in *PDC Creating Product Offerings* for more information.

Bundle Settings Subsection

Field	Description
Bill on Purchase	(Optional) Select to immediately generate a bill for any purchase fees when the customer purchases the bundle. Selecting **Bill on Purchase** does not generate a bill for any other charges, such as recurring, usage, or cancellation fees.

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Field	Description
Align Balance Validities on First Usage	(Optional) Select to synchronize the start date of all balance elements to the date of first usage when one of them is activated for the first time. This setting applies only to those balance elements that are configured to start on first usage, and only to those first-usage balance elements that are granted by the offers in the bundle.
Activate all other offers in addition to first usage offer	(Optional) Select to activate all offers in the bundle upon first usage of any offer in the bundle. For example, assume a bundle contains charge offers A, B, and C. If the first service a customer uses is in charge offer B on June 1, all three charge offers are activated on June 1. **Note**: If you select this option, it overrides the start date and first usage settings of all offers in the bundle.
CSR Allowed to Customize Bundle	(Optional) Select whether the CSR can change the default price and effective time period of a charge or discount offer for a customer account. • **Prohibited**: Prevent CSRs from changing the price and the effective period of a bundle. • **Required**: Force CSRs to change the price and the effective period of a bundle. • **Optional**: Give CSRs the option to change the price and the effective period of a bundle.
Purchase Period	Set the purchase start and end dates to specify when the bundle can be purchased. • For **Start**, you can select **Immediately**, or enter a specific start date and time. • For **End**, you can select **Never**, or enter a specific end date and time. The purchase period excludes the end date. For example, a bundle with a start date of May 1 and an end date of May 10 is available from May 1 through May 9.

Related Tasks

Specifying Bundle General Information and Settings

Terms Section

Optionally, use the Terms section to add a subscription term to a bundle.

> **Note**
>
> These terms are used if you make the bundle optional in a package. For required bundles, the terms you select here will be overridden by the terms you associate with the package.

Field	Description
Name	Select a subscription term. If you do not want to add a term, select **No Commitment**.

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Related Tasks

Adding Terms to a Bundle

Manage Bundle Content Section

Use the table in the Manage Bundle Content section to add charge offers and discount offers to the bundle.

Click the **Add** icon in the table to search for offers and add them to the bundle.

See "Offer Customization Subsection" for a description of the offer settings.

Column	Description
Charge/Discount Offer	Lists the charge offers and discount offers included in the bundle.
Inactive When Purchased	Displays whether the offer is inactive when purchased.
Quantity	Displays the quantity of the offer.
Offer Ends	Displays when the offer ends.

Related Tasks

Adding an Offer to a Bundle

Offer Customization Subsection

Use the Offer Customization subsection to customize the offer settings.

For a description of the areas in Offer Customization, see:

- Purchase Area
- Recurring Area
- Usage Area

Field	Description
Name	Displays the name of the charge offer or discount offer. This field is not editable.
Quantity	Enter the quantity of the charge offer or discount offer included in the bundle. For example, if a bundle for a cable service includes a charge offer that provides one set-top box and you want to include three set-top boxes with the cable service, enter **3** for the charge offer in that bundle.
Offer Start	Select one of the following options to specify when to activate the offer and apply purchase charges: • **Immediately**: At purchase time. • **Relative to Purchase**: A time relative to the purchase time (for example, one month from purchase). • **First Usage**: The first time a subscriber uses a service or discount. Do not select **First Usage** for charge offers that does not have any usage charge. If you do so, the charge offer will never be activated.

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Field	Description
Offer End	Select one of the following options to specify when the offer ends: • **Never**: The offer never expires. • **Relative to Start**: The offer expires on the date relative to when the offer is started.
Offer is Inactive when Purchased	Select to set the offer to inactive status when purchased.
Inactive Reason Code	Enter a non-zero value that corresponds to the reason code defined in the database.
Renewal Mode	Specify how to align the charge offer's end dates when a bundle is suspended and then reactivated: • Select the check box: The end date is realigned to the bundle's reactivation date. • Deselect the check box: The end date stays aligned with the original billing cycle date. The end date also depends on the settings for cycle alignment in the Create Charge Offer page and the Create Charge dialog box.
Proration	Select one of the following options to specify how to prorate cycle charges and discounts for the offer: • **Not Selected**: Prorated cycle charges and discounts are calculated according to the system-wide setting. • **Based on a 30-day month**: Prorated cycle charges and discounts are calculated based on a 30-day month, regardless of the number of days in the billing cycle. • **Based on the number of days in the month**: Prorated cycle charges and discounts are calculated based on the actual number of days in a particular cycle, such as 28 days in February, 31 days in March, and 30 days in April.
This is an add-on charge offer	Specify whether the charge offer can be purchased as an add-on product: • Select the check box: This charge offer is an add-on. Customers must already own a valid base offer before they can purchase it. • Deselect the check box: This is a base charge offer, which means it will have its own validity start date.

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Field	Description
Align Validity	Specify how to align an add-on charge offer's validity dates. The add-on charge offer's validity start date is the end date of a charge offer that you specify. For example, assume charge offer A has a validity period from June 1 through June 15. If you specify to align add-on charge offer B's validity period with charge offer A, charge offer B's validity start date would be June 15. Select one of the following: • **Specific charge offer**: Aligns the validity dates with the base charge offer that you specify. Select the base charge offer in the **Align with Offer** field. • **Earliest expiring charge offer, excluding add-on offers**: Aligns the validity dates with the active charge offer that expires first, excluding any add-on charge offers. • **Latest expiring charge offer, excluding add-on offers**: Aligns the validity dates with the active charge offer that expires last, excluding any add-on charge offers. • **Earliest expiring charge offer**: Aligns the validity dates with the active charge offer that expires first. • **Latest expiring charge offer**: Aligns the validity dates with the active charge offer that expires last. **Note:** This field appears when you select **This is an add-on charge offer**.

Purchase Area

Use the Purchase area to customize the discount percentage and behavior of one-time charges.

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Field	Description
Behavior	Select one of the following options to specify how to handle multiple purchases of the same charge offer or discount offer: • **Create a new subscription and keep the old one**: The additional charge offer or discount offer is purchased as a new, unrelated subscription. The balance impacts and validity periods of the old and new subscription are completely independent. This is the default option. • **Extend the old subscription, setting validity to whichever is later, the new or existing validity period**: The additional charge offer is purchased as an extension to the existing subscription if it is purchased within the specified grace period. The new balance impacts are added to the existing balance group. The validity period for the balance is then set to either the old validity end date or the new validity end date, whichever is later. • **Extend the old subscription with a separate balance and setting validity to whichever is later, the new or existing validity**: The additional charge offer is purchased as an extension to the existing subscription if it is purchased within the specified grace period. The new balance impacts are added as sub-balances within the existing balance group. The validity period for the new balance starts on the purchase date and ends at either the old validity end date or the new validity end date, whichever is later. • **Extend the old subscription, adding the new validity to the old validity**: The additional charge offer is purchased as an extension to the existing subscription if it is purchased within the specified grace period. The new balance impacts are added to the existing balance group. The validity period for the balance is then set by adding the new validity period to whatever remains of the old validity period. • **Extend the old subscription with a separate balance and adding the new validity to the old validity**: The additional charge offer is purchased as an extension to the existing subscription if it is purchased within the specified grace period. The new balance impacts are added as sub-balances within the existing balance group. The validity period for the new balance starts at the old balance end date. The new validity period's end date is set by adding the new validity period to whatever remains of the old validity period. • **Create a new subscription and cancel the old one**: The additional charge offer or discount offer replaces the existing subscription. The existing subscription is canceled, any configured proration is applied, and the new subscription is created, with all balance impacts and validity periods set as though for a new purchase.
Grace Period	Enter the number of seconds, minutes, hours, or days in the grace period. The default is **0 Days**. This field appears only if you selected an option for extending the old subscription.
Discount	For charge offers, specify a discount percentage to apply for the purchase charge.

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Recurring Area

Use the Recurring area to customize the discount percentage and effective period for recurring charges.

Field	Description
Starts	Select one of the following options to specify when to start charging cycle fees or discounting cycle fees: • **Immediately**: At purchase time. • **Relative to Purchase**: A time relative to the purchase time. • **First Usage**: The first time a subscriber uses a service or discount.
Ends	Select one of the following options to specify when charges or discounts for cycle fees are no longer charged to the account: • **Never**: Continue charging or discounting cycle fees for as long as the charge offer or discount offer is effective. • **Relative to Start**: Stop charging or discounting cycle charges relative to when it is started.
Discount	For charge offers, specify a discount percentage for the cycle charge.

Usage Area

Use the Usage area to customize the discount percentage and effective period for usage charges.

Field	Description
Starts	Select one of the following options to specify when to start charging usage fees or discounting usage fees: • **Immediately**: At purchase time. • **Relative to Purchase**: A time relative to the purchase time. • **First Usage**: The first time a subscriber uses a service or discount.
Ends	Select one of the following options to specify when charges or discounts for usage fees are no longer charged to the account: • **Never**: Continue charging or discounting usage fees for as long as the charge offer or discount offer is effective. • **Relative to Start**: Deactivate the charge offer or discount offer relative to when it is started.
Discount	For charge offers, specify a discount percentage to apply for the usage charge.

Related Tasks

Customizing an Offer in a Bundle

Search for Offers Dialog Box

Use the Search for Offers dialog box to search for charge or discount offers to add to the bundle.

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Field	Description
Pricing Component	Select **Charge Offer** or **Discount Offer** to search for charge or discount offers to add to the bundle.
Applicable To	Displays the service that is associated with the bundle. You selected this service in the General Information section.
Name	(Optional) Enter a full or partial name of the offer to search for. Select an operator from the operator list and enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the offers that meet the search criteria. Select the offers you want to add to the bundle and click **OK**.

Field	Description
Name	Lists the charge offers or discount offers that match the search criteria. Offers which are already added to the bundle are excluded from the search results.
Description	Displays the description of each charge offer and discount offer.
Phase	Displays the status of the charge and discount offers. • **Draft:** The offer has not been published to Oracle Communications Billing and Revenue Management (BRM). It is still part of a changeset in PDC. • **Promoted:** The offer has been published to BRM. It is no longer part of a changeset in PDC.
Applicable To	Displays the service associated with the charge offer or discount offer.

Related Tasks

Adding an Offer to a Bundle

Related Topics

Searching for Pricing Components

Prerequisite Section

Use the table in the Prerequisite section to specify the bundles that must be owned by the account to purchase the current bundle.

Click the **Add** icon in the table to search for bundles and add them to the prerequisite bundles.

Column	Description
Name	Lists the prerequisite bundles.
Applicable To	Displays whether the prerequisite bundle is associated with a specific service or customer account.
Description	Displays each prerequisite bundle's description.

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Column	Description
View Charge Offer Provisioning Tags	Select from the **Actions** menu to display the provisioning tags associated with the charge offer.

Related Tasks

Defining a Prerequisite Relationship Between Bundles

Search Bundles for Prerequisite Dialog Box

Use the Search Bundles for Prerequisite dialog box to search for bundles to add as prerequisites.

Field	Description
Pricing Component	Displays **Bundle** as the pricing component.
Name	(Optional) Enter a full or partial name of the bundle to search for. Select an operator from the operator list and enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the bundles that meet the search criteria. Select the bundle to add as a prerequisite bundle and click **OK**.

Field	Description
Name	Lists the bundles that match the search criteria.
Description	Displays each bundle's description.
Phase	Displays the status of the bundles. • **Draft:** The bundle has not been published to BRM. It is still part of a changeset in PDC. • **Promoted:** The bundle has been published to BRM. It is no longer part of a changeset in PDC.

Related Tasks

Defining a Prerequisite Relationship Between Bundles

Related Topics

Searching for Pricing Components

Mutually Exclusive Section

Use the table in the Mutually Exclusive section to specify the bundles that cannot be purchased or owned along with the current bundle.

Click the **Add** icon in the table to search for bundles and add them to the mutually exclusive bundles.

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Column	Description
Name	Lists the mutually exclusive bundles.
Applicable To	Displays whether the mutually exclusive bundle is associated with a customer account or with a specific service.
Description	Displays each mutually exclusive bundle's description.
View Charge Offer Provisioning Tags	Select from the **Actions** menu to display the provisioning tags associated with the charge offer.

Related Tasks

Defining a Mutually Exclusive Relationship Between Bundles

Search Bundles for Exclusivity Dialog Box

Use the Search Bundles for Exclusivity dialog box to search for bundles to add as mutually exclusive.

Field	Description
Pricing Component	Displays **Bundle** as the pricing component.
Name	(Optional) Enter a full or partial name of the bundle to search for. Select an operator from the operator list and enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the bundles that meet the search criteria. Select the bundles to add as mutually exclusive bundles and click **OK**.

Field	Description
Name	Lists the bundles that match the search criteria.
Description	Displays each bundle's description.
Phase	Displays the status of the bundles. • **Draft:** The bundle has not been published to BRM. It is still part of a changeset in PDC. • **Promoted:** The bundle has been published to BRM. It is no longer part of a changeset in PDC.

Related Tasks

Defining a Mutually Exclusive Relationship Between Bundles

Related Topics

Searching for Pricing Components

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Transition Rules for Eligible Bundles Section

Use the table in the Transitions Rules for Eligible Bundles section to specify the bundles that can be used to upgrade or downgrade the current bundle.

Click the **Add** icon in the table to search for bundles and add them to the eligible bundles for transition.

Column	Description
Name	Lists the bundles you selected to be used to upgrade or downgrade the current bundle. Each name is a link to that bundle's summary.
Transition Type	Select one of the following transition types: • **Upgrade**: Upgrade to a bundle that is typically more expensive and has more features. • **Downgrade**: Downgrade to a bundle that is typically less expensive and has fewer features.
Validity Period	Set the validity period to specify the effective start and end dates for the transition rule.
New Bundle Cycle Fees Start	Specify when the new bundle's cycle fees should start by selecting one of the following: • **This cycle, in full**: Apply the new bundle's fee this cycle, and fully refund the original bundle's cycle fee. • **This cycle, prorated**: Prorate the current and new bundles' cycle fees. • **Next cycle**: Apply the original bundle's fee to this cycle, and start the new bundle's fee in the next billing cycle.
Waive Fees	Select to waive any purchase and cancellation fees when the transition change occurs. **Purchase** and **Cancel** are selected by default to waive any purchase and cancellation fees.
View Charge Offer Provisioning Tags	Select from the **Actions** menu to display the provisioning tags associated with the charge offer.

Related Tasks

Defining Transition Rules for Bundles

Search Bundles for Transition Dialog Box

Use the Search Bundles for Transition dialog box to search for bundles to which the transition rule applies.

Field	Description
Pricing Component	Specifies the type of pricing component to search for. This field displays **Bundle**. Do not modify this value.
Applicable To	Displays the service that is associated with the bundle. You selected this service in the General Information section.

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Field	Description
Name	(Optional) Enter a full or partial name of the bundle to search for. Select an operator from the operator list and enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the bundles that meet the search criteria. Select the bundles to define transition rules and click **OK**.

Column	Description
Name	Lists the bundles that match the search criteria.
Description	Displays each bundle's description.
Phase	Displays the status of the bundles. • **Draft:** The bundle has not been published to BRM. It is still part of a changeset in PDC. • **Promoted:** The bundle has been published to BRM. It is no longer part of a changeset in PDC.
Applicable To	Displays the service to which the bundle applies.

Related Tasks

Defining Transition Rules for Bundles

Related Topics

Searching for Pricing Components

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9
Packages

A package consists of one or more bundles that you make available to customers for purchase.

You can also define the following in packages:

- Credit limits.
- How you want to track balances for the services you offer.
- Rules for upgrading and downgrading from one package to another.
- Rules for transitioning between services for different generations of wireless technology.
- You can restrict the discounts that can be used with the package.

To make a package available for purchase, you add it to a package list.

For overview information, see "Creating Packages and Package Lists" in *PDC Creating Product Offerings*.

Creating a Package

To create a package:

1. In the Pricing section of the navigation pane, under **Bundling**, click **Create Package**.

   The **Create Package** page appears.
2. In the General Information section, enter a unique name for the package and a description.
3. (Optional) Select **Bill on Purchase** to immediately generate a bill for the purchase fees upon purchase.
4. (Optional) Select **Activate all other offers in addition to first usage offer** to activate *all* charge offers in the package upon first usage of any charge offer in the package.
5. Expand the Product Specification Attributes subsection.
6. If any product specification attributes were defined for packages in an XML template file, set their values.
7. (Optional) In the Terms section, select the name of the subscription term that you want to add. If you do not want to add a term, select **No Commitment**.
8. Add services and bundles. See "Adding Services and Bundles" for more information.
9. Add balance tracking information. See "Adding Balance Tracking Information" for more information.
10. Define rules for upgrading and downgrading the package. See "Defining Transition Rules" for more information.
11. Define rules for transitioning to other packages for different generations of wireless technology. See "Defining Generation Change Rules" for more information.
12. Specify the discount offers that cannot be used with the package. See "Defining Discount Restrictions" for more information.

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13. Click **Finish**.

    The overview page for the package appears.

Related Topics

Create Package Page Reference

Adding Services and Bundles

You add bundles to a package by associating them either with a service or with the account.

Before adding a bundle to a package, you need to add a service or service group and then associate each service with a bundle. A service group allows you to group related services.

To add services and bundles:

1. In the Manage Package Content section, click **Add Service** in the table.

   The Add Service dialog box appears.
2. Select the service that you want to associate the bundles within the package and click **OK**.

   The table is updated with the new service.
3. (Optional) Create a service group. See "Creating a Service Group" for more information.
4. Select a service, service group, or **Account**, then click **Add Bundle**.

   > **Note**
   >
   > You cannot add more than one bundle to Account.

   The Search for Bundles dialog box appears.
5. Search for the bundles to add to the package. See "Searching for Pricing Components" for more information.
6. In the Results table, select the bundles that you want to add to the package and click **OK**. Hold down the **CTRL** key to select more than one bundle.

   The bundles appear under the service in the table.
7. Select one of the following:
   a. **Optional.** Select this if the bundle can be optionally purchased with the service.
   b. **Required—can be canceled on its own.** Select this if the bundle is required but can be canceled without canceling the associated service.
   c. **Required—must cancel service with bundle.** Select this if the bundle is required but can be canceled only after canceling the associated service.
8. Add more services and bundles as needed.

Related Topics

Manage Package Content Section

Search for Bundles Dialog Box

Creating a Package

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Creating a Service Group

You create a service group by adding member services to a subscription service.

To create a service group:

1. In the Manage Package Content section, click **Add Service** in the table.

   The Add Service dialog box appears.

   > **Note**
   >
   > A member service can be added to a top-level service only.

2. Select a service that represents the subscription service and click **OK**.
3. Click **Add Member Service**.

   The Add Member Service dialog box appears.
4. Select the service that represents the member service and click **OK**. Hold down the **CTRL** key to select more than one service.

   The member service appears under the subscription service in the table.

Related Topics

Adding Services and Bundles

Adding Balance Tracking Information

By default, balances for all services are tracked in the account balance group. To track balances for specific services in the package, you associate the services with their own balance groups.

For each balance group, you can specify credit limits, credit thresholds, loan thresholds, and consumption rules for balance elements used by the services in that group.

To assign services to balance groups and set credit limits, credit thresholds, and consumption rules, refer to the following topics:

- Assigning Services to Balance Groups
- Setting Credit Limits
- Setting Credit Thresholds
- Setting Loan Thresholds
- Setting Consumption Rules

Related Topics

Balance Groups Section

Creating a Package

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Assigning Services to Balance Groups

To track any services in a separate balance group, first create a new balance group, then associate one or more services to the balance group.

1. In the Balance Groups section, click the **Add** icon in the table for balance groups.

   The new balance group is added to the table with a default name.

   You can add as many balance groups as needed for the services in your package.
2. In the table in Assign Services to Balance Groups section, select the service, then select a balance group in the **Balance Group** column.

   If the service you have selected is a subscription service, all member services are assigned to the selected balance group. If the member services were assigned to different balance groups than the service group, the member services retain their original balance groups.

Related Topics

Adding Balance Tracking Information

Deleting a Balance Group

A balance group continues to exist even when there are no services associated with it. You must explicitly delete unwanted balance groups.

To delete a balance group:

1. In the table in Assign Services to Balance Group section, select the balance group from the **Balance Group** list.

   Services assigned to the balance group appear in the table.
2. In the **Balance Group** column, select a different balance group for each service.
3. In the table in Balance Groups section, select the balance group to delete and click the **Delete** icon.

Setting Credit Limits

You can set credit limits for each balance element that the package uses. This limits the amount of a particular balance element that customers can use.

To set a credit limit for a balance element:

1. In the Balance Groups section, select the balance group in which to set the credit limit.
2. In the Credit Limits and Consumption Rules section, click the **Add** icon in the table.
3. From the **Balance Element** list, select a balance element.
4. In the **Credit Limit** column, deselect **None** and enter a non-zero amount to specify the maximum amount of the balance element that a customer can use.

Related Topics

Adding Balance Tracking Information

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Setting Credit Thresholds

You can set credit thresholds to notify customers when their balance reaches a specified amount.

To set percentage thresholds, you need to set credit floor and credit limit. This applies to both currency and noncurrency balance elements.

To set fixed threshold, you don't need to set any credit limit. If you do set a credit limit and credit floor, then the fixed threshold must be between the credit floor and credit limit.

To set a credit threshold for a balance element:

1. In the Balance Groups section, select the balance group in which to set the credit threshold.
2. In the Credit Limits and Consumption Rules section, in the **Credit Floor** column, deselect **None** and enter an amount that establishes the starting point for the credit threshold.
3. Do one of the following:
   - To specify the credit threshold as a percentage of the credit limit, click the link in the **Percentage Threshold** column.

     The Percentage Threshold dialog box appears displaying the selected percentages.

     Click the **Clear** button to deselect the selected percentages and then select the percentages at which you want notifications to occur.
   - To enter a fixed threshold amount, click the link in the **Fixed Threshold** column.

     The Fixed Threshold dialog box appears.

     In the **Amount** field, enter the fixed threshold value at which you want notification to occur; click **Add**.

     Add additional amounts as needed.

Related Topics

Adding Balance Tracking Information

Setting Loan Thresholds

You can set loan thresholds to offer loan to customers when their balance reaches a specified amount.

To set percentage thresholds, you need to set credit floor and credit limit. This applies to both currency and noncurrency balance elements.

To set fixed threshold, you don't need to set any credit limit. If you do set a credit limit and credit floor, then the fixed threshold must be between the credit floor and credit limit.

To set a loan threshold for a balance element:

1. In the Balance Groups section, select the balance group in which to set the loan threshold.
2. In the Credit Limits and Consumption Rules section, in the **Credit Floor** column, deselect **None** and enter an amount that establishes the starting point for the loan threshold.
3. Do one of the following:

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- To specify the loan threshold as a percentage of the credit limit, click the link in the **Loan Percentage Threshold** column.

  The Percentage Threshold dialog box appears displaying the selected percentages.

  Click the **Clear** button to deselect the selected percentages and then select the percentages at which you want notifications to occur.

- To enter a fixed threshold amount, click the link in the **Loan Fixed Threshold** column. The Fixed Threshold dialog box appears. In the **Amount** field, enter the fixed threshold value at which you want notification to occur; click **Add**.

  Add additional amounts as needed.

Related Topics

Adding Balance Tracking Information

Deleting a Credit Limit

To delete a credit limit for a balance element:

1. In the Balance Groups section, select the balance group from which to delete the credit limit.
2. In the Credit Limits and Consumption Rules section, in the **Credit Limit** column, select **None** for the balance element for which you want to remove the credit limit.

Setting Consumption Rules

Consumption rules specify the order in which sub-balances of a balance element are consumed.

To set consumption rules for balance elements:

1. In the Balance Groups section, select the balance group for which to set the consumption rules.
2. In the Credit Limits and Consumption Rules section, from the **Balance Element** list, select the balance element for which you want to set the consumption rule.
3. In the **Consumption Rule** column, select the consumption rule to apply.

Related Topics

Adding Balance Tracking Information

Deleting a Consumption Rule

To delete a consumption rule for a balance element:

1. In the Balance Groups section, select the balance group from which to delete the consumption rule.
2. In the Credit Limits and Consumptions Rule section, in the **Consumption Rules** column, select **NONE** for the balance element for which you want to delete the consumption rule.

Defining Transition Rules

Transition rules are used to upgrade or downgrade a package to another package.

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When you set up a transition rule, you include the following information:

- The allowable packages for upgrade or downgrade of the current package.
- The validity period when the transition rule becomes effective.
- Which fees to apply to the billing cycle in which the transition occurs: the original package's fees, the new package's fees, or prorated fees from both packages.
- Whether to waive any purchase and cancellation fees when the upgrade or downgrade occurs.

To define transition rules for a package:

1. In the Transition Rules for Eligible Packages section, click the **Add** icon in the table.

   The Search Packages for Transition dialog box appears.

2. Search for packages to define the transition rules. See "Searching for Pricing Components" for more information.

   When you define a transition, you must transition to a package that has at least one of the services that the current package contains. When searching for a package to add to a transition rule, you must specify the service that is required in both packages.

3. In the Results table, select the packages allowed for transition and click **OK**.

   The package is added to the table in the Transition Rules for Eligible Packages section.

   The packages are added to the table with default values for transition type, validity period, and purchase and cancellation fees.

4. In the **Type** column, select **Upgrade** or **Downgrade**.

5. (Optional) To change the default validity period, click the link in **Validity** column. You can update start and end dates in the Edit Validity dialog box.

   See "Setting Validity Periods".

6. Deselect **Immediately** and **Never** to enter a new start and end date. You can also use the date selector to select new dates.

7. Specify when to start the new package's cycle fees:

   - **This cycle, in full**: Apply the new package's fee this cycle, and fully refund the original package's cycle fee.
   - **This cycle, prorated**: Prorate the current and new packages' cycle fees.
   - **Next cycle**: Apply the original package's fee to this cycle, and start the new package's fee in the next billing cycle.

8. (Optional) In the **Waive Fees** column, deselect **Purchase** and **Cancel** to charge purchase and cancellation fees.

Related Topics

Transition Rules for Eligible Packages Section

Search Packages for Transition Dialog Box

Creating a Package

Defining Generation Change Rules

Generation change rules allow transitions between packages for different generations of wireless technology.

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When you set up a generation change rule, you include the following information:

- The packages that can be used for the generation change.
- The validity period when the generation change rule becomes effective.
- Whether to waive the purchase and cancellation fees when the generation change occurs.

To define generation change rules:

1. In the Generation Change Rules for Eligible Packages section, click the **Add** icon in the table.

   The Search Packages for Generation Change dialog box appears.

2. Search for packages to define the generation change rules. See "Searching for Pricing Components" for more information.

   > **Note**
   >
   > The same package cannot be used in both a transition rule and a generation change rule.

3. In the Results table, select the packages allowed for generation change and click **OK**.

   The packages are added to the table with default values for validity period and purchase and cancellation fees.

4. (Optional) To change the default validity period, click the validity period.

   The Edit Validity dialog box appears.

5. Deselect **Immediately** and **Never** to enter a new start and end date. You can also use the date selector to select new dates.

6. (Optional) In the **Waive Fees** column, deselect **Purchase** and **Cancel** to charge purchase and cancellation fees.

Related Topics

Generation Change Rules for Eligible Packages Section

Search Packages for Generation Change Dialog Box

Creating a Package

Defining Discount Restrictions

Discount restrictions specify the discount offers that cannot be used with the package.

To specify discount restrictions for a package:

1. In the Manage Discount Restrictions section, click the **Add** icon the table.

   The Search Discount Offers for Restriction dialog box appears.

2. Search for the discount offers to add as discount restrictions. See "Searching for Pricing Components" for more information.

3. In the Results table, select the discount offers that cannot be used with the package and click **OK**.

   The discount offers are added to the table.

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Related Topics

Manage Discount Restrictions Section

Search Discount Offers for Restriction Dialog Box

Creating a Package

Create Package Page Reference

Use the **Create Package** page to group one or more services and associated bundles into a package.

For a description of the fields, see:

- General Information Section
- Terms Section
- Manage Package Content Section
- Balance Groups Section
- Transition Rules for Eligible Packages Section
- Generation Change Rules for Eligible Packages Section
- Manage Discount Restrictions Section

General Information Section

Use the General Information section to provide general information for the package.

For a description of the Extended Attributes subsection, see "Product Specification Attributes Subsection".

Field	Description
Name, Description	Enter a unique name and a description for the package.
Bill on Purchase	(Optional) Select to immediately generate a bill for any purchase fees when the customer purchases the package. Selecting **Bill on Purchase** does not generate a bill for any other charges, such as recurring, usage, or cancellation fees.
Activate all other offers in addition to first offer usage	(Optional) Select to activate all charge offers in the package upon first usage of any charge offer in the package. For example, assume a package contains bundle 1 with charge offers A and B, and bundle 2 with charge offer C. If, on 15 May, a customer's first service usage is in charge offer B, all charge offers (A, B, and C) are activated on 15 May.

Related Tasks

Creating a Package

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Product Specification Attributes Subsection

Use the Product Specification Attributes subsection to provide values for any product specification attributes configured in XML template files. The fields available in this subsection depend on what is configured in the XML template file.

See "About Extended Attributes for Pricing Components" in *PDC Creating Product Offerings* for more information.

Terms Section

Optionally, use the Terms section to add a subscription term to a package.

Field	Description
Name	Select a subscription term. If you do not want to add a term, select **No Commitment**.

Related Tasks

Creating a Package

Manage Package Content Section

Use the Manage Package Content section to add services and bundles to the package.

Column	Description
Add Service	Click to add services.
Add Bundle	Click to add bundles for a service.
Add Member Service	Click to add member services to a service group.
Services in Package	Lists the services and associated bundles in the package. Included services can be either standalone services or service groups.
Purchase options	The following options are supported: • **Optional.** Select this if the bundle is not required to be purchased with the package. Optional bundles can be purchased at a later time. • **Required—can be canceled on its own.** Select this if the bundle is required but can be canceled later. You can cancel this bundle without canceling the associated service. • **Required—must cancel service with bundle.** Select this if the bundle can be canceled only when canceling the service.

Related Tasks

Adding Services and Bundles

Search for Bundles Dialog Box

Use the Search for Bundles dialog box to search for bundles you want to add to the package.

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Field	Description
Pricing Component	Specifies the type of pricing component to search for. This field displays **Bundle**.
Applicable To	Select the service associated with the bundles you want to search for. This field displays the service currently selected in the Content table.
Name	(Optional) Enter a full or partial name of the bundle to search for. Select an operator from the operator list and enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the bundles that meet the search criteria. Select the bundles you want to add to the package and click **OK**.

Field	Description
Name	Lists the bundles that match the search criteria.
Description	Displays a description for each bundle.
Phase	Displays the status of the bundle. • **Draft:** The bundle is only visible to the user. • **Promoted:** The bundle has been validated and is visible for other users to use.
Applicable To	Displays the service associated with the bundles where charges are applied.

Related Tasks

Adding Services and Bundles

Related Topics

Searching for Pricing Components

Balance Groups Section

Use the Balance Groups section to assign services to balance groups and set credit limits and consumption rules.

To add a new balance group, click the **Add** icon in the table.

You can add as many balance groups as required for your services.

Assign Services to Balance Groups Section

Use the Assign Services to Balance Groups section to assign services to balance groups.

From the **Balance Group** list, you can select a specific balance group, which displays only the services assigned to that balance group, or you can select **All**, which displays all balance groups and all the services assigned to them.

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Column	Description
Service	Lists the services assigned to the balance group selected in the **Balance Group** list.
Balance Group	Specifies the balance group for the corresponding service in the **Service** column. To assign the service to a different balance group, click in the **Balance Group** cell, then select a new balance group from the list.

Credit Limits and Consumption Rules Section

Use the Credit Limits and Consumption Rules section to set credit limits and consumption rules for balance elements in a balance group.

Column	Description
Balance Element	Select the balance element for which you want to set credit limit and consumption rule.
Credit Limit	Specifies the maximum amount of the balance element that the customer can use. Deselect **None** to set a limit. In the text field, enter the maximum amount of the balance element a customer can use (must be greater than 0).
Credit Floor	Specifies the starting value for credit thresholds. Deselect **None** to set the starting value for the credit threshold. In the text field, enter the starting point for the credit threshold (must be greater than 0).
Percentage Threshold	Specifies the percentage of the balance element used when the customer should be notified of the usage balance. To enter a percentage threshold, click the link in the **Percentage Threshold** column. This opens the Percentage Threshold dialog box. Deselect **Percentage Threshold** then select the percentages at which you want notifications to occur. For example, if you want notifications to occur when 50% of the balance element is used and again when 75% is used, select **50%** and **75%**. To set a percentage threshold for currency balance element, a credit limit must be specified; for noncurrency balance elements, both a credit limit and a credit floor must be specified.
Fixed Threshold	Specifies the balance element amount remaining when the customer should be notified of the remaining balance. To enter a fixed threshold, click the link in the **Fixed Threshold** column. This opens the Fixed Threshold dialog box. Deselect **Fixed Threshold**; in the **Amount** field, enter the fixed threshold values at which you want notifications to occur; click **Add**. For example, if you have a package that offers 3 hours of usage over a 24-hour period and you want notification to occur when 30 minutes of usage remains and again when 5 minutes of usage remains, enter **30** and **5**.

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Column	Description
Loan Percentage Threshold	Specifies the percentage of the balance element used when the customer should be notified of the loan offer. To enter a percentage threshold, click the link in the **Loan Percentage Threshold** column. This opens the Percentage Threshold dialog box. Deselect **Percentage Threshold** then select the percentages at which you want loan offer notifications to occur. For example, if you want notifications to occur when 50% of the balance element is used and again when 75% is used, select **50** and **75**. To set a percentage threshold for currency balance element, a credit limit must be specified; for noncurrency balance elements, both a credit limit and a credit floor must be specified.
Loan Fixed Threshold	Specifies the balance element amount remaining when the customer should be notified of the loan offer. To enter a fixed threshold, click the link in the **Loan Fixed Threshold** column. This opens the Fixed Threshold dialog box. In the **Amount** field, enter the fixed threshold values at which you want loan offer notifications to occur; click **Add**. For example, if you have a package that offers 3 hours of usage over a 24-hour period and you want notification to occur when 30 minutes of usage remains and again when 5 minutes of usage remains, enter 30 and 5.
Consumption Rule	Select one of the following consumption rules for the balance element. • **EST**: Earliest start time. • **LST**: Latest start time. • **EET**: Earliest expiration time. • **LET**: Latest expiration time. • **ESTLET**: Earliest start time and latest expiration time. • **ESTEET**: Earliest start time and earliest expiration time. • **LSTEET**: Latest start time and earliest expiration time. • **LSTLET**: Latest start time and latest expiration time. • **EETEST**: Earliest expiration time and earliest start time. • **EETLST**: Earliest expiration time and latest start time. • **LETEST**: Latest expiration time and earliest start time. • **LETLST**: Latest expiration time and latest start time.

Related Tasks

Assigning Services to Balance Groups

Adding Balance Tracking Information

Setting Consumption Rules

Transition Rules for Eligible Packages Section

Use the Transition Rules for Eligible Packages section to define the rules for upgrading or downgrading the current package.

Column	Description
Package	Lists the allowable packages for upgrade or downgrade of the current package. You can click on the package link to view the package summary.

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Column	Description
For Service	Displays the service in the current package allowed for the upgrade or downgrade. The service must exist in the current package as well as in the package it is transitioned to.
Type	Specifies whether the transition rule is for a package upgrade or package downgrade.
Validity	Specifies the period when the transition of the current package to the allowable package is valid. The default validity period is **Immediately** to **Never Ends**. Click the link in this column to change the validity period. In the Edit Validity dialog box, set the new start and end dates.
New package Cycle Fees Start	Specify when the new package's cycle fees should start by selecting one of the following: • **This cycle, in full**: Apply the new package's fee this cycle, and fully refund the original package's cycle fee. • **This cycle, prorated**: Prorate the current and new packages' cycle fees. • **Next cycle**: Apply the original package's fee to this cycle, and start the new package's fee in the next billing cycle.
Waive Fees	Indicates to waive any purchase and cancellation fees when the transition occurs. Deselect **Purchase** and **Cancel** to charge purchase and cancellation fees when the transition occurs.

Related Tasks

Defining Transition Rules

Search Packages for Transition Dialog Box

Use the Search Packages for Transition dialog box to search for allowable packages for upgrading or downgrading the current package.

Field	Description
Pricing Component	Specifies the type of pricing component to search for. This field displays **Package**.
Applicable To	Select the service in the current package for which you want to define the transition rule. When you define a transition, you must transition to a package that has at least one of the services that the current package contains. When searching for a package to add to a transition rule, you must specify the service that is required in both packages.
Name	(Optional) Enter a full or partial name of the package to search for. Select an operator from the operator list and enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

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Results Table

The Results table lists the packages that meet the search criteria. Select the packages to define the transition rules and click **OK**.

Field	Description
Name	Lists the packages that match the search criteria.
Description	Displays a description for each package.
Phase	Displays the status of the packages. • **Draft:** The package is only visible to the user. • **Promoted:** The package has been validated and is visible for other users to use.

Related Tasks

Defining Transition Rules

Related Topics

Searching for Pricing Components

Generation Change Rules for Eligible Packages Section

Use the Generation Change Rules for Eligible Packages section to specify packages for different generations of wireless technology that the current package can be transitioned to.

Column	Description
Package	Lists the allowable packages the current package can transition to. You can click on the package link to view the package summary.
Validity	Specifies the period when the transition of the current package to the allowable package is valid. The default validity period is **Immediately** to **Never Ends**. Click the link in this column to change the validity period. In the Edit Validity dialog box, set the new start and end dates.
Waive Fees	Indicates to waive any purchase and cancellation fees when the generation change occurs. Deselect **Purchase** and **Cancel** to charge purchase and cancellation fees when the generation change occurs.

Related Tasks

Defining Generation Change Rules

Search Packages for Generation Change Dialog Box

Use the Search Packages for Generation Change dialog box to search for allowable packages for transitioning the current package.

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Field	Description
Pricing Component	Specifies the type of pricing component to search for. This field displays **Package**.
Applicable To	Specifies the service associated with the packages you want to search for. For instance, to transition from a 2G to a 3G package, select a 3G service.
Name	(Optional) Enter a full or partial name of the package to search for. Select an operator from the operator list and enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the packages that meet the search criteria. Select the packages to define generation change rules and click **OK**.

Field	Description
Name	Lists the packages that match the search criteria.
Description	Displays a description for each package.
Phase	Displays the status of the packages. • **Draft:** The package is only visible to the user. • **Promoted:** The package has been validated and is visible for other users to use.

Related Tasks

Defining Generation Change Rules

Related Topics

Searching for Pricing Components

Manage Discount Restrictions Section

Use the Manage Discount Restrictions section to specify discount offers that cannot be used with the package.

Column	Description
Name	Lists the discount offers that cannot be used with the package.
Description	Displays a description for each discount offer.

Related Tasks

Defining Discount Restrictions

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Search Discount Offers for Restriction Dialog Box

Use the Search Discount Offers for Restriction dialog box to search for discount offers that cannot be used with the package.

Field	Description
Pricing Component	Specifies the type of pricing component to search for. This field displays **Discount Offer**.
Applicable To	Select the service where charges for the discount offers are applied.
Name	(Optional) Enter a full or partial name of the discount offers to search for. Select an operator from the operator list and enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the discount offers that meet the search criteria. Select the discount offers to add as discount restrictions and click **OK**.

Field	Description
Name	Lists the discount offers that match the search criteria.
Description	Displays a description for each discount offer.
Phase	Displays the status of the discount offers. • **Draft:** The discount offer is only visible to the user. • **Promoted:** The discount offer has been validated and is visible for other users to use.
Applicable To	Displays the service where charges for the discount offers are applied.

Related Tasks

Defining Discount Restrictions

Related Topics

Searching for Pricing Components

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10

Package Lists

A package list enables you to group related packages that you make available to your customers for purchase. For example, you can create a package list that contains packages that can be used to register new customer accounts or one that contains packages that provide add-on services and bundles for your existing customers.

To work with package lists, see the following topics:

- Creating a Package List
- Create Package List Page Reference

For overview information, see "Creating Package Lists" in *PDC Creating Product Offerings*.

Creating a Package List

To create a package list:

1. In the Pricing section of the navigation pane, under **Bundling**, click **Create Package List**.

   The **Create Package List** page appears.
2. In the General Information section, enter a name and a description for the package list.
3. In the **Segment** field, enter the segment name for the package list.
4. From the **Type** list, select or enter the type of packages you want to add to your package list.

   > **Note**
   >
   > The combination of the package list segment and type are case-sensitive and uniquely identify a package list when the package list is used in Oracle Communications Billing and Revenue Management (BRM).
5. From the **Status** list, select a status of **Active** if you want the package list to be available for purchase as soon as it is added to the database; otherwise, select **Inactive**.
6. In the Content Information section, click the **Add** icon in the table.

   The Search for Packages dialog box appears.
7. Search for the packages to add to the package list. See "Searching for Pricing Components".
8. In the Results table, select the packages to add to the package list and click **OK**.

   The packages are added to the table.
9. Click **Finish**.

   The overview page for the package list appears.

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Related Topics

Create Package List Page Reference

Search for Packages Dialog Box

Create Package List Page Reference

Use the **Create Package List** page to group one or more packages into a package list.

For a description of the fields, see:

- General Information Section
- Package List Content Section

General Information Section

Use the General Information section to provide general information for the package list.

Field	Description
Name, **Description**	Enter a unique name and a description for the package list.
Segment	Enter the segment name for the package list. **Note:** If the package list is used in BRM, the segment name must be **CSR**. If you enter a new segment, it is added to the **Segment** list when the package list is added to the database.
Type	Select or enter the type of packages you want to add to the package list. The default values are: • **New**: For packages used to register new accounts. • **Add-on**: For packages used to provide add-on services and bundles to existing customers. If you enter a new type, it is added to the **Type** list when the package list is added to the database. The package list segment and type are case-sensitive and together uniquely identify a package list when the package list is used in BRM. For example, a CSR package identified as *CSR-New* and *CSR-new* are considered as two different package lists.
Status	Select one of the following: • **Active**: The package list is available for purchase as soon as it is added to the database. • **Inactive**: The package list is not available for purchase. You can activate it at a later time.

Related Tasks

Creating a Package List

Package List Content Section

Use the table in the Package List Content section to add packages to the package list. Click the **Add** icon to search for packages and add them to the package list.

The table displays the name and description for each package added to the package list.

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Related Tasks

Creating a Package List

Search for Packages Dialog Box

Use the Search for Packages dialog box to search for packages to add to the package list.

Field	Description
Pricing Component	Specifies the type of pricing component to search for. This field displays **Packages**.
Applicable To	Select the service type for the packages you want to add.
Name	(Optional) Enter a full or partial name of the packages to search for. Select an operator from the operator list, and then enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the packages that meet the search criteria. Select the packages to add to the package list and click **OK**.

Column	Description
Name	Lists the packages that match the search criteria.
Description	Displays a description for each package.
Phase	Displays the status of the packages. • **Draft:** The package is only visible to the user. • **Promoted:** The package has been validated and is visible for other users to use.

Related Tasks

Creating a Package List

Related Topics

Searching for Pricing Components

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11

Time Models

A time model is a set of time periods that are used to set up different prices in a charge. Each time period consists of one or more time segments. A time segment can be represented using days of the week, days of the month, time of day, months of the year, or special days defined in a calendar.

For example, you can define two time periods, Peak and Offpeak, with the following time segments:

- Peak
  - Monday through Friday; 8:00 through 21:00
- Offpeak
  - Monday through Friday; 21:00 through 8:00
  - Saturday and Sunday; All Day

To work with time models, see the following topics:

- Creating a Time Model
- Create Time Model Page Reference

Creating a Time Model

> **Note**
>
> The features of the time model that are displayed are determined by the pricing profile that you select for the time model. Not all features described in the procedure below are supported by all pricing profiles.

To create a time model:

1. In the Pricing section of the navigation pane, under **Models and Selectors**, click **Create Time Model**.

   The **Create Time Model** page appears.
2. In the General Information section, enter a name and a description for the time model.
3. From the **Pricing Profile** list, select the pricing profile for the time model.

   The pricing profile that you select determines the capabilities that are supported for the time model.
4. (Optional) Select **Uses Special Day Calendar**, and then select the special day calendar.

   If this option is selected, the time model must include at least one time period with special day calendar. Otherwise, the time model validation will fail.
5. (Optional) In the Time Periods section, from the **Effective Period** list, click **Manage** to add or change the effective period.

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The effective period indicates when the time periods in the time model are valid. The default effective period starts immediately and never ends.

6. In the Time Periods table, click **Create Time Period**.

   The Manage Time Periods dialog box appears.

7. Enter a unique name for the time period, and then select one or more of the time attributes to create a time segment.

   You cannot have both normal days and special days included in the time period. They are mutually exclusive.

8. Click **OK**.

9. (Optional) To add another segment to the time period, in the Time Periods table, click **Add Time Segment**.

10. When you have completed adding time periods and time segments, click **Finish**.

    The overview page for the time model appears.

Related Topics

Create Time Model Page Reference

Manage Time Periods Dialog Box

Create Time Model Page Reference

Use the **Create Time Model** page to create a time model with one or more time periods.

For a description of the fields, see:

- General Information Section
- Time Periods Section

General Information Section

Use the General Information section to provide general information for the time model.

Some of the fields described in the following table might not display depending on the pricing profile that is selected.

Field	Description
Name, Description	Enter a unique name and a description for the time model.
Pricing Profile	Select the pricing profile for the time model.
Uses Special Day Calendar	(Optional) Select to use a special day calendar in this time model. Then, select the calendar that you want to use. A special day calendar contains special days (for example, holidays) that can be included in the time segment. If this option is selected, the time model must include at least one time period with special day calendar. Otherwise, the time model validation will fail.

Related Tasks

Creating a Time Model

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Time Periods Section

Use the table in the Time Periods section to add time periods in the time model.

The table displays the time periods and the time segments within those time periods.

Some of the fields described in the following table might not display depending on the pricing profile that is selected.

Field	Description
Effective Period	(Optional) Set the start and end dates to specify the period during which the time periods in the time model are valid. The default effective period starts immediately and never ends. From the **Effective Period** list, click **Manage** to add or change an effective period. See "Manage Effective Periods Dialog Box".

Column	Description
Create Time Period	Click to add a time period and the time segment for the time model. See "Manage Time Periods Dialog Box".
Add Time Segment	Click to add a time segment to an existing time period. See "Manage Time Periods Dialog Box".
Duplicate Time Period 	Click this icon to duplicate a time period. A copy of the time period is added to the table.
Edit Time Period 	Click this icon to edit a time segment for a time period.
Time Period	Lists the names of the time periods in the time model.
Time Segment	Displays the time segments for the time periods. A time segment defines the specific times in the time period. A time segment can include: • Days of the week • Time of day • Months of the year • Days of the month • Special days in a calendar For example: • Any Day of the Week; 18:00:00-06:00:00;

Related Tasks

Creating a Time Model

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Manage Effective Periods Dialog Box

Use the Manage Effective Periods dialog box to add or change effective periods.

- To add a new effective period, click the **Add** icon. In the Add New Effective Period dialog box, enter a start date or click the date selector to select a date.
- To change the effective period that starts immediately, deselect **Immediately** and enter a new start date or click the date selector to select a date.

Related Tasks

Creating a Time Model

Manage Time Periods Dialog Box

Use the Manage Time Periods dialog box to define a time period and select attributes for a time segment.

Some of the fields described in the following table might not display depending on the pricing profile that is selected.

Field	Description
Name	Enter a name for the time period. Every time period within a time model should have a unique name.
Days of the Week	Select the days of the week for the time segment. • To include all the days of the week, select **Any Day of the Week**. • To include specific days, deselect **Any Day of the Week**, and then select one or more days. For example, to set the days to weekdays only, select **Monday**, **Tuesday**, **Wednesday**, **Thursday**, and **Friday**.
Time of Day	Set the time interval for the time segment. • To set the time interval to 24 hours of the day, select **All Day**. • To set a specific time, deselect **All Day**, and then set **From** and **To** to the start and end time. For example, to set the time to off-peak hours, set **From** to **18:00:00** and **To** to **06:00:00**.
Months of the Year	Select the months of the year for the time segment. • To include specific months, deselect **Any Month of the Year**, and then select one or more months.
Days of the Month	Select the days of the month for the time segment. • To include specific days, deselect **Any Day of the Month**, and then select one or more days.
Special Day Calendar	Select to use special days defined in the special day calendar. You cannot have both normal days and special days included in the time period. They are mutually exclusive.

Related Tasks

Creating a Time Model

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12

Charge Selectors

Use a charge selector to charge different fees for the same event, based on the value of one or more attributes, such as subscriber (account), service, and event, and custom rules (if applicable). For example, you might charge different fees for phone calls depending on a call's origin and destination.

To set up a charge selector, you create rules that map attribute values and custom rules (if applicable) to a charge. When an event occurs, the appropriate charge is selected based on the rules.

To work with charge selectors, see the following topics:

- Creating a Charge Selector
- Create Charge Selector Page Reference

For overview information, see "About Selectors" in *PDC Creating Product Offerings*.

Creating a Charge Selector

To create a charge selector:

1. In the Pricing section of the navigation pane, under **Models & Selectors**, click **Create Charge Selector**.
2. Specify general information for the charge selector. See "Specifying Charge Selector General Information".
3. Select event attributes to use in the charge selector rules. See "Selecting Attributes for Charge Selector Rules".
4. Create rules for the charge selector. See "Creating Charge Selector Rules".

Related Topics

Create Charge Selector Page Reference

Specifying Charge Selector General Information

To specify general information for a charge selector:

1. In the General Information section, enter a name and description for the charge selector.

   The name must be unique across USC, APN, and charge selectors. For example, if you name an APN selector *My APN* you cannot name a charge selector *My APN.*
2. From the **Applicable To** list, select the service to which the charge selector applies.

   Alternatively, select **Account**.
3. From the **Event** list, select the event type to which the charge selector applies.

   Select a fold event type, if you are creating the charge selector for fold charge.
4. From the **Pricing Profile** list, select a pricing profile for the charge selector.

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5. The **Candidate Selection Mode** and **Candidate Selection Balance Element** fields are available only when you select an ECE pricing profile.
6. From the **Candidate Selection Mode** list, select how the Charge Selector resolves multiple matching rules.
7. If you select **MIN_IMPACT** or **MAX_IMPACT**, select the currency or noncurrency balance element for comparing the matching results from the **Candidate Selection Balance Element** list.
8. From the **Measured By** list, select the ratable usage metrics (RUMs) to which the charge selector applies.

   Select **Fold**, if you are creating the charge selector for fold charge.

Related Topics

General Information Section

Creating a Charge Selector

Selecting Attributes for Charge Selector Rules

Selecting Attributes for Charge Selector Rules

To create rules for a charge selector, you must first specify the subscriber, service, or event attributes to use in the rules.

To specify attributes for charge selector rules:

1. Go to the Rule Attributes section of the **Create Charge Selector** page.
2. In the Selector Options section, select one of the following options:

   > **Note**
   >
   > For delayed usage events in an ECE-enabled system, only the **Use Value Map** option is available.

   - **Zoning Not Used**:

     Select this option if you do not want to use zoning in your charge selector rules.
   - **Use Value Map**

     Select this option if you want to use values in a value map in the fields of the charge selector rules. After selecting this option, select a value map from the list.
   - **Use Zone Model**

     Select this option if you want to use zone impact categories from a zone model in the charge selector rules. After selecting this option, select a zone model from the list.
3. In the Select Fields for Rules section, click the **Add** icon in the table.

   The Select Field dialog box appears.
4. Select at least one field to use in the rules.

   If you are creating the charge selector for fold charge, you must use the fields associated with **Fold** to define the charge selector rules. In the Select Field dialog box, expand **Event** fields and then select **Resource_ID** and **Quantity** fields under **Fold**.

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To select multiple fields at the same time, press and hold the **CTRL** key during selection.

> **Note**
>
> The selected fields are included in every rule defined for the charge selector, but in each rule, you can override a field's default value.

5. Click **OK**.

   The selected fields are added to the table.

6. Click the **Value Type** cell, and select a value type from the list.

7. In the **Default** column, do one of the following:

   - If you selected **Single Value,** enter the value directly in the table cell.
   - If you selected **List of Values:**
     a. Click the cell.

        The Enter Value dialog box appears.

     b. Click the **Add** icon, and then enter the value into the field.

     c. Add the other values in the list.

     d. Click **OK**.

        The values, separated by commas, are added to the cell.
   - If you selected **Value from Value Map:**
     a. Click the cell.

        The Enter Value dialog box appears.

     b. In the **Value Map Name** field, expand the value map hierarchy until you find the value that you want to use.

     c. Select the value, and click **OK**.

        The value is added to the cell.
   - If you selected **Zone Model Result:**
     a. Click the cell.

        The Enter Value dialog box appears.

     b. In the **Filter** field, do one of the following:

        To restrict the impact categories displayed in the **Zone Model Result** list, enter the appropriate value.

        To return all the impact categories in the zone model, enter an asterisk (*).

     c. Click the **Show Zone Model Results** arrow button to populate the **Zone Model Result** list.

        A list of zone model results appears in the **Zone Model Result** list.

     d. Select an impact category, and click **OK**.

        The impact category is added to the cell.

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Related Topics

Rule Attributes Section

Select Fields for Rules Section

Creating a Charge Selector

Creating Charge Selector Rules

Charge selectors use rules to determine which charge to use to rate an event.

To create a charge selector rule:

1. In the table in the Rules section of the **Create Charge Selector** page, do one of the following:
   - To add a new rule to the table, click the **Add** icon.

     A new rule is added to the table. If an existing rule was selected when you clicked **Add**, the new rule appears below the selected rule. If no rule was selected, the new rule appears in the last row. The rule's fields contain the default values specified in the Rule Attributes section.
   - To add a new rule above or below a specified existing rule:
     a. Select the existing rule.
     b. Click **Actions** in the table toolbar.
     c. Choose **Insert rule above** or **Insert rule below**.

     A new rule is added to the table in the selected position. The rule's fields contain the default values specified in the Rule Attributes section.
   - To add a copy of an existing rule:
     a. Select the rule that you want to duplicate.
     b. Click the **Duplicate** icon:

     A copy of the selected rule is added below the selected rule. The rule's fields contain the same values as the fields in the original rule.

     > **Note**
     >
     > When a rule is added above one or more existing rules, the priority numbers of the following rules are automatically adjusted to accommodate the new rule. (Rules appear in numerical order.)

2. In the **Rule Name** column, enter a unique name for the rule.
3. In the field columns, enter the values to override the default values as follows:
   - If you selected **Single Value,** enter the value directly in the table cell.
   - If you selected **List of Values:**
     a. Click the cell.

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The Enter Value dialog box appears.

b. Click the **Add** icon, and then enter the value into the field.

c. Add the other values in the list.

d. Click **OK**.

The values, separated by commas, are added to the cell.

- If you selected **Value from Value Map:**

a. Click the cell.

The Enter Value dialog box appears.

b. In the **Value Map Name** field, expand the value map hierarchy until you find the value that you want to use.

c. Select the value, and click **OK**.

The value is added to the cell.

- If you selected **Zone Model Result:**

a. Click the cell.

The Enter Value dialog box appears.

b. In the **Filter** field, do one of the following:

To restrict the impact categories displayed in the **Zone Model Result** list, enter the appropriate value.

To return all the impact categories in the zone model, enter an asterisk (*).

c. Click the **Show Zone Model Results** arrow button to populate the **Zone Model Result** list.

A list of zone model results appears in the **Zone Model Result** list.

d. Select an impact category, and click **OK**.

The impact category is added to the cell.

4. In the **Impact Category** column under **Results**, click the cell, and enter the impact category to use for determining the charge.

5. In the **Charge** column under **Results**, click the cell, and select a charge or click one of the following commands:

- **Search:** Opens the Search for Charges dialog box. Search for a charge to add to the charge selector. See "Searching for Pricing Components".
- **Create:** Opens the Create Charge section. See "Charge Offers" for information about creating charges.
- **Edit:** Opens the charge currently specified for the rule in the Edit Charge section. See "Charge Offers" for information about modifying charges. If a charge has not been specified for the rule, this command does not appear in the list.

The table lists the rules in the order that the rules are evaluated. You can select a rule and move it up or down if you wish to reorder the rules. See "Working with Tables".

Related Topics

Rules Section

Creating a Charge Selector

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Create Charge Selector Page Reference

Use the **Create Charge Selector** page to create rules that associate subscriber, service, and event attributes with charges.

For a description of the fields, see the following:

- General Information Section
- Rule Attributes Section
- Rules Section

General Information Section

Use the General Information section to provide a name and description for the charge selector and to associate it with a service, event type, profile, and RUM.

Field	Description
Name, Description	Enter a unique name and a description. The name must be unique across USC, APN, and charge selectors. For example, if you name an APN selector *Default Analyzer,* you cannot name a charge selector *Default Analyzer.*
Applicable To	Select the service to which the charge selector applies. Select the service to which the charge selector applies or select **Account**.
Event	Select the event type to which the charge selector applies. Select a fold event type, if you are creating the charge selector for fold charge.
Pricing Profile	Select the pricing profile for the charge selector. Only charges associated with the selected profile can be used as the result of each charge selector rule.
Candidate Selection Mode	For an ECE pricing profile, select how to resolve multiple matching Charge Selector rules. FIRST_MATCH uses the first match in configured order, MIN_IMPACT uses the result with the lowest comparable impact, and MAX_IMPACT uses the result with the highest comparable impact. FIRST_MATCH is the default.
Candidate Selection Balance Element	For MIN_IMPACT and MAX_IMPACT, select the currency or noncurrency balance element whose immediate impacts are compared. Impacts to other balance elements do not affect selection. PDC requires this value for impact-based modes. For FIRST_MATCH, PDC sends None, which the rating engine does not use.
Measured By	Select the RUMs to which the charge selector applies. Select **Fold**, if you are creating the charge selector for fold charge. RUMs specify the units used to measure an event and how to calculate the measurement. Any charge created in the charge selector will use a RUM. If you search for a charge from the charge selector, the search will be limited to charges that use this RUM.

Related Tasks

Creating a Charge Selector

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Rule Attributes Section

Use the Rule Attributes section to select the subscriber, service, and event fields to use in the charge selector rules.

Related Tasks

Selecting Attributes for Charge Selector Rules

Selector Options Section

Use the Selector Options section to associate the charge selector with a value map or a zone model.

> **Note**
>
> For delayed usage events in an ECE-enabled system, only the **Use Value Map** option is available.

Option	Description
Zoning Not Used	Select this option if you do not want to use zoning in your charge selector rules.
Use Value Map	Select this option if you want to use values in a value map in the fields of the charge selector rules. After selecting this option, select a value map from the list.
Use Zone Model	Select this option if you want to use zone impact categories from a zone model in the charge selector rules. After selecting this option, select a zone model from the list.

Related Tasks

Selecting Attributes for Charge Selector Rules

Select Fields for Rules Section

Use the table in the Select Fields for Rules section to add fields to the charge selector. Each rule in the charge selector will include all the fields that you add to this table.

Click the **Add** icon in the table to add one or more fields.

Column	Description
Field	Displays the fields that you select in the Select Field dialog box. You use these fields to define the charge selector rules. If you are creating the charge selector for fold charge, you must select fields associated with **Fold** to define the charge selector rules. In the Select Field dialog box, expand **Event** fields and then select **Resource_ID** and **Quantity** fields under **Fold**. Each rule contains all the fields in this column.

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Column	Description
Value Type	Click the cell to select the type of value the field can contain: • **Single Value:** One fixed value. • **List of Values:** Multiple values. • **Value from Value Map:** A value from the value map selected in the Rule Attributes section. • **Zone Model Result:** An impact category from the zone model selected in the Rule Attributes section.
Operator	Displays the relationship between the rule's default field value and the value in the subscriber, service, event, or custom rule field. The operator is determined by the specified value type. You cannot change it. Possible operators are the following: • **Equals:** Used for a single value, a value from value map, a zone, and an impact category (zone result). The value of the field in the subscriber, service, event, or custom rule must match the value of the field in the rule. • **Matches:** Used for a single value, a value from value map, a zone, and an impact category (zone result). The value of the field in the subscriber, service, or event must match the value of the field in the rule. • **Maps to:** Used for a value from value map. The value of the field in the subscriber, service, or event must map to the value of the field in the rule. • **Contained in List:** Used for a list of values. The value in the corresponding subscriber, service, or event field must match one or more of the values in the rule.
Default	Enter the default value for the field. If the operator is **Equals**, **Maps to**, or **Contained in List:**, an asterisk (*) matches all values in the corresponding subscriber, service, event, or custom rule field. If the operator is **Matches**, a dot followed by an asterisk (.*) matches all values in the corresponding subscriber, service, or event field. The default value can be overridden in individual rules.

Related Tasks

Selecting Attributes for Charge Selector Rules

Rules Section

Use the Rules section to define Charge Selector rules. By default, the selector returns the impact category and charge associated with the first rule whose field values match the corresponding subscriber, service, and event values. When Candidate Selection Mode is MIN_IMPACT or MAX_IMPACT, the selector evaluates all matching rules and uses the Candidate Selection Balance Element to choose the result.

Click the **Add** icon in the table to add rules.

The table in this section lists the rules in the order that the rules are evaluated. You can select a rule and move it up or down if you wish to reorder the rules.

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Column	Description
Priority	Enter the rule's priority. This table displays rules in numerical order, starting with priority 1. The rules are evaluated in order of priority. When a rule includes multiple attributes (fields), BRM processes the attributes from left to right. Reorder a rule in either of the following ways: • Click the **Move Rule Up** or **Move Rule Down** icon. • Change the rule's priority number. PDC moves the rule to its new place. The priority numbers of all rules affected by the move are changed.
Rule Name	(Optional) Enter a unique name for the rule.
Field Name	(Optional) Select an operator and enter a value. You can select one of the following operators: • Equals or Not Equals • Matches or Not Matches • In or Not In **Note**: The NOT operators can be used only if you are using ECE for the usage charging. To apply the rule to a subscriber, service, or event, the field value must match the corresponding subscriber, service, or event value. **Note**: An asterisk (*) matches all values in the corresponding subscriber, service, or event field.
Impact Category	Enter the impact category to use for determining the charge.
Charge	Select an item to find, configure, or modify the charge used when the rule is true: • **Search** to add an existing charge • **Create** to configure a new charge • **Edit** to modify the current charge The charge must contain a price selector that associates the results impact category with a pricing instance. See "Price Selectors ".

Related Tasks

Creating Charge Selector Rules

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13

Price Selectors

A price selector associates event, service, and account attributes with prices. You use a price selector in a charge to apply prices based on price selector rules.

To work with price selectors, see the following topics:

- Creating a Price Selector
- Create Price Selector Page Reference

For overview information, see "About Selectors" in *PDC Creating Product Offerings*.

Creating a Price Selector

To create a price selector:

1. In the Pricing section of the navigation pane, under **Models and Selectors**, click **Create Price Selector**.

   The **Create Price Selector** page appears.
2. Specify general information for the price selector. See "Specifying Price Selector General Information".
3. Select the attributes that you want to use in the rules for the price selector. See "Selecting Rule Attributes".
4. Create the rules for the price selector. See "Creating Price Selector Rules".
5. When you have completed adding the rules, click **Finish**.

   The overview page for the price selector appears.

Related Topics

Create Price Selector Page Reference

Specifying Price Selector General Information

To specify general information for the price selector:

1. In the General Information section, enter a name and description for the price selector.
2. (Optional) From the **Service** list, select the service for which you want to create the price selector.
3. (Optional) From the **Event** list, select the event for which you want to create the price selector.
4. From the **Pricing Profile** list, select the pricing profile to associate with the price selector.

Related Topics

General Information Section

Creating a Price Selector

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Selecting Rule Attributes

You select rule attributes that you want to use to define price selector rules.

To select the rule attributes:

1. In the Select Fields for Rules section, click the **Add** icon in the table.

   The Select Field dialog box appears.

2. Select the fields that you want to use to define price selector rules and click **OK**. Hold down the **Ctrl** key to make multiple selections.

   The selected fields are added to the table with default values.

   The same fields are used for all the rules in the price selector. You can override the default values and set specific values in the rule to limit the fields that you want used in a rule.

3. In the **Value Type** column, select the type of value the field contains.
   - If you select **Value of Another Field**, in the **Default** column, select the other field.

4. In the **Default** column, enter the default value for the field.

   An asterisk (*) specifies the field can contain any value.

Related Topics

Select Fields for Rules Section

Creating a Price Selector

Creating Price Selector Rules

To create price selector rules:

1. (Optional) In the Rules section, from the **Effective Period** list, click **Manage** to add or change an effective period.

   The effective period indicates when the rules in the price selector are valid.

   The default effective period starts immediately and never ends.

2. Click the **Add** icon in the table to add a new rule.

   A row is added to the table.

3. In the **Rule Name** column, enter a name for the rule.

4. In the subsequent columns, enter or modify the values for each of the rule attributes that you selected previously.

5. In the **Price** column, do one of the following:
   - To create a pricing configuration for the rule, select **Create**.

     In the Price section, enter a name for the price. In the Pricing Details section, configure the balance impact.

   - To search for an existing pricing configuration from the price selector, select **Search**.
   - To modify the pricing configuration, select **Edit**.

The table lists the rules in the order that the rules are evaluated. You can select a rule and move it up or down if you wish to reorder the rules. See "Working with Tables".

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Related Topics

Rules Section

Creating a Price Selector

Selecting Rule Attributes

Create Price Selector Page Reference

Use the **Create Price Selector** page to create rules that associate event, service, and account attributes with prices.

For a description of the fields, see:

- General Information Section
- Select Fields for Rules Section
- Rules Section

General Information Section

Use the General Information section to provide general information for the price selector.

Field	Description
Name, Description	Enter a unique name and a description for the price selector.
Service	(Optional) Select the service for which you want to create the price selector.
Event	(Optional) Select the event for which you want to create the price selector rules.
Pricing Profile	Select the pricing profile to associate with the price selector.

Related Tasks

Creating a Price Selector

Select Fields for Rules Section

Use the Select Fields for Rules section to select the fields that you want to use in the price selector rules.

Column	Description
Field	Displays the fields that you have selected to define price selector rules. The same fields are used for all the rules in the price selector. You can override the default values and set specific values in the rule to limit the fields that you want used in a rule.
Value Type	Select the type of value that the field contains. • **Single Value**: The field contains a single value. • **Value of Another Field**: The field contains the value of another field. If you select this option, in the **Default** column, select the other field.

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Column	Description
Operator	Displays the relationship between the rule's default field value and the value in the subscriber, service, or event field. The equal sign appears next to the field names when you define the rules. The value of the field in the subscriber, service, or event must match the value of the field in the rule.
Default	Enter a default value for the field. An asterisk (*) specifies the field can contain any value. If the field is limited to predefined values, a list of values appears. Select a value from the list. If **Value of Another Field** is selected for **Value Type**, the Select Field dialog box appears. In the Select Field dialog box, select the field you want.

Related Tasks

Selecting Rule Attributes

Rules Section

Use the Rules section to define price selector rules and associate each rule to a pricing.

The table in this section lists the rules in the order that the rules are evaluated. The price selector returns the price of the first rule that matches the values in the event.

You can select a rule and move it up or down if you wish to reorder the rules.

Field	Description
Effective Period	(Optional) Set the start and end dates to specify the period when the rules in the price selector are valid. The default effective period starts immediately and never ends. From the **Effective Period** list, click **Manage** to add or change an effective period. See "Manage Effective Periods Dialog Box".

Column	Description
Priority	Enter the rule's priority. This table displays rules in numerical order, starting with priority 1. The rules are evaluated in order of priority. Reorder a rule in either of the following ways: • Click the **Move Rule Up** or **Move Rule Down** icon. • Change the rule's priority number. PDC moves the rule to its new place. The priority numbers of all rules affected by the move are changed.
Rule Name	Enter a name for the rule.

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Column	Description
Field Name	(Optional) Select an operator and enter a value. You can select one of the following operators: • Equals or Not Equals • In or Not In • Matches or Not Matches **Note**: The NOT operators can be used only if you are using ECE for the usage charging. To apply the rule to a subscriber, service, or event, the field value must match the corresponding subscriber, service, or event value. **Note**: An asterisk (*) matches all values in the corresponding subscriber, service, or event field.
Price	Create a pricing instance or select an existing pricing instance to associate with the rule.

Related Tasks

Creating Price Selector Rules

Pricing Details Section

Use the Pricing Details section to configure pricing for the price selector rule.

Field	Description
Price tier tabs	If a pricing uses more than one RUM, a tab appears for each RUM. These tabs are called price tiers.
Used By	Click this button to display a hierarchical view of all components that use the pricing.
Quantity Range	Click the link to specify the range for level of usage or frequency of occurrence used for the pricing.
Add Quantity Range 	Click this icon to add a quantity range to pricing.
Change Price 	Click this icon to specify the components affected by a pricing change.
Minimum Charges 	Click this icon to set a minimum charge for the balance elements in pricing.

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Field	Description
Add Balance Impact 	Click this icon to add a balance impact to pricing.
Add Counter 	Click this icon to add a counter to pricing.
Impact	Select whether to credit or debit a balance or to increase or decrease a counter.
Amount	Specify the amount of balance impact.
Balance Element	Select the balance element to debit or credit.
Per Unit	Select the type of unit to which the charge applies. The selected unit should be related to the RUM associated with the charge. For example, if the RUM is Duration and the units specified in the RUM are seconds, select a unit that can be converted to seconds, such as Minute.
Increment	Select the increment that is used to determine the charge. For example, if the charge is 40 cents per minute, increment is 2 minutes, and rounding is set to **Round Up**, the quantity will be rounded up to 2 minutes and the charge will be 80 cents.
Amount Is Valid	Click the link to display the Amount Is Valid dialog box. Select the validity period for the balance impact.
GLID	Select the general ledger ID (G/L ID) assigned to the event.
Proration	(Only for recurring charges) Select **Do not prorate** to prevent the proration settings in a charge from applying to the balance impact.

Related Tasks

Creating Price Selector Rules

Search for Pricing Dialog Box

Use the Search for Pricing dialog box to find pricing to add to a price selector.

Field	Description
Pricing Component	Specifies the type of pricing component to search for. This field displays **Pricing**.
Profile	Displays the pricing profile associated with the price selector.
Name	(Optional) Enter a full or partial name of the pricing to search for. Select an operator from the operator list, and then enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

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Results Table

The Results table lists the pricing instances that match the search criteria. Select the pricing instance and click **OK**.

Column	Description
Name	Displays the pricing instances that match the search criteria.
Description	Displays a description of each pricing instance.
Phase	Displays the status of the pricing instances: • **Draft:** The pricing is only visible to the user. • **Promoted:** The pricing has been validated and is visible for other users to use.

Related Tasks

Creating Price Selector Rules

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14

Discount Selectors

A discount selector consists of rules that associate account, service, and event attributes and custom rules with discounts. You use a discount selector to determine which discount to apply to an event.

To work with discount selectors, see the following topics:

- Creating a Discount Selector
- Create Discount Selector Page Reference

For overview information, see "About Selectors" in *PDC Creating Product Offerings*.

Creating a Discount Selector

To create a discount selector:

1. In the Pricing section of the navigation pane, under **Models and Selectors**, click **Create Discount Selector**.

   The **Create Discount Selector** page appears.
2. Specify general information for the discount selector. See "Specifying Discount Selector General Information".
3. Select the attributes you want to use to define the rules in the discount selector. See "Selecting Rule Attributes".
4. Create the discount selector rules. See "Creating Discount Selector Rules".
5. When you have completed adding the rules, click **Finish**.

   The overview page for the discount selector appears.

Related Topics

Create Discount Selector Page Reference

Adding Discounts to a Discount Offer

Specifying Discount Selector General Information

To specify general information:

1. In the General Information section, enter a name and description for the discount selector.
2. (Optional) From the **Service** list, select the service for which you want to create the discount selector.
3. (Optional) From the **Event** list, select the event for which you want to create the discount selector.
4. From the **Pricing Profile** list, select the pricing profile to associate with the discount selector.

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Related Topics

General Information Section

Creating a Discount Selector

Selecting Rule Attributes

You select rule attributes that you want to use to define the discount selector rules.

To select rule attributes:

1. In the Select Fields for Rules section, click the **Add** icon in the table.

   The Select Field dialog box appears.
2. Select the fields that you want to use in the rule and click **OK**. Hold down the **Ctrl** key to make multiple selections.

   The selected fields are added to the Select Fields for Rules table with default values.

   The same fields are used for all the rules in the discount selector. You can override the default values and set specific values in the rule to limit the fields that you want used in a rule.
3. In the **Value Type** column, select the type of value the field contains.

   If you select **Value of Another Field**, in the **Default** column, select the other field.
4. In the **Default** column, enter the default value for the field.

   An asterisk (*) specifies the field can contain any value.

Related Topics

Select Fields for Rules Section

Creating a Discount Selector

Creating Discount Selector Rules

To create discount selector rules:

1. (Optional) In the Rules section, from the **Effective Period** list, click **Manage** to add or change an effective period.

   The effective period indicates when the rules in the discount selector are valid.

   The default effective period starts immediately and never ends.
2. Click the **Add** icon in the table to add a new rule.

   A row is added to the table.
3. In the **Rule Name** column, enter a name for the rule.
4. In the subsequent columns, enter or modify the values for each of the rule attributes that you selected previously.
5. In the **Discount** column, do one of the following:
   - To create a discount for the rule, select **Create**. See "Adding a New Discount" for information about creating a discount.

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- To search for an existing discount from the discount selector to associate with the rule, select **Search**.
- To modify the discount, select **Edit**.

The table lists the rules in the order that the rules are evaluated. You can select a rule and move it up or down if you wish to reorder the rules. See "Working with Tables".

Related Topics

Rules Section

Creating a Discount Selector

Create Discount Selector Page Reference

Use the **Create Discount Selector** page to create rules that associate event, service, and account attributes with discounts.

For a description of the fields, see:

- General Information Section
- Select Fields for Rules Section
- Rules Section

General Information Section

Use the General Information section to provide general information for the discount selector.

Field	Description
Name, Description	Enter a unique name and a description for the discount selector.
Service	(Optional) Select the service for which you want to create the discount selector.
Event	(Optional) Select the event for which you want to create the discount selector.
Pricing Profile	Select the pricing profile to associate with the discount selector.

Related Tasks

Specifying Discount Selector General Information

Select Fields for Rules Section

Use the Select Fields for Rules section to select the fields that you want to use in the discount selector rules.

Column	Description
Field	Displays the fields that you have selected to define discount selector rules. The same fields are used for all the rules in the discount selector. You can override the default values and set specific values in the rule to limit the fields that you want used in a rule.

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Column	Description
Value Type	Select the type of value that the field contains. • **Single Value**: The field contains a single value. • **Value of Another Field**: The field contains the value of another field. If you select this option, in the **Default** column, select the other field.
Operator	Displays the relationship between the rule's default field value and the value in the subscriber, service, event, custom rule, or profile field. **Equals**, **Matches**, or **Maps to** appears next to the field names in the Rules section. The value of the field in the subscriber, service, event, or custom rule must match the value of the field in the rule.
Default	Enter a default value for the field. If the operator is **Equals** or **Maps to**, an asterisk (*) specifies the field can contain any value. If the operator is **Matches**, a dot followed by an asterisk (.*) specifies the field can contain any value. If the field is limited to predefined values, a list of values appears. Select a value from the list. If **Value of Another Field** is selected for **Value Type**, the Select Field dialog box appears. In the Select Field dialog box, select the field you want.

Related Tasks

Selecting Rule Attributes

Rules Section

Use the Rules section to define discount selector rules and associate each rule to a discount.

The table in this section lists the rules in the order that the rules are evaluated. The price selector returns the price of the first rule that matches the values in the event.

You can select a rule and move it up or down if you wish to reorder the rules.

Field or Column	Description
Effective Period	(Optional) Set the start and end dates to specify the period when the rules in the discount selector are valid. The default effective period starts immediately and never ends. From the **Effective Period** list, click **Manage** to add or change an effective period. See "Manage Effective Periods Dialog Box".
Priority	Enter the rule's priority. This table displays rules in numerical order, starting with priority 1. The rules are evaluated in order of priority. Reorder a rule in either of the following ways: • Click the **Move Rule Up** or **Move Rule Down** icon. • Change the rule's priority number. PDC moves the rule to its new place. The priority numbers of all rules affected by the move are changed.
Rule Name	Enter a name for the rule.

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Field or Column	Description
Field Name	(Optional) Select an operator and enter a value. You can select one of the following operators: • Equals or Not Equals • Matches or Not Matches • In or Not In **Note**: The NOT operators can be used only if you are using ECE for the usage charging. To apply the rule to a subscriber, service, or event, the field value must match the corresponding subscriber, service, or event value. **Note**: An asterisk (*) matches all values in the corresponding subscriber, service, or event field.
Discount	Create a discount or select an existing discount to associate with the rule. See "Adding a New Discount" for information about creating a discount.

Related Tasks

Creating Discount Selector Rules

Search for Discounts Dialog Box

Use the Search for Discounts dialog box to search for discounts to include in the discount selector.

Field	Description
Pricing Component	Specifies the pricing component to search for. This field displays **Discount**.
Profile	Displays the pricing profile associated with the discount selector.
Name	(Optional) Enter a full or partial name of the discount to search for. Select an operator from the operator list, and then enter a value in the field next to the operator list. Leading and trailing whitespaces are removed from the search criteria. If embedded whitespaces need to be included in the search, use '% %' in place of the whitespace in your search criteria.

Results Table

The Results table lists the discounts that match the search criteria. Select the discount to include in the discount selector and click **OK**.

Field	Description
Name	Lists the discounts that match the search criteria.
Description	Displays a description for each discount.
Phase	Displays the status of the discount: • **Draft:** The discount is only visible to the user. • **Promoted:** The discount has been validated and is visible for other users to use.

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Related Tasks

Creating Discount Selector Rules

Related Topics

Searching for Pricing Components

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15

Generic Selectors

A generic selector is a set of rules that map service and event attributes and expressions to a result. You use a generic selector in a charge to apply prices based on the rule results.

To work with generic selectors, see the following topics:

- Creating a Generic Selector
- Create Generic Selector Page Reference

For overview information, see "About Selectors" in *PDC Creating Product Offerings*.

Creating a Generic Selector

To create a generic selector:

1. In the Pricing section of the navigation pane, under **Models and Selectors**, click **Create Generic Selector**.

   The **Create Generic Selector** page appears.
2. Specify general information for the generic selector. See "Specifying Generic Selector General Information".
3. Select the attributes that you want to use in the rules for the generic selector. See "Selecting Rule Attributes".
4. Create the rules for the generic selector. See "Creating Generic Selector Rules".
5. When you have completed adding the rules, click **Finish**.

   The overview page for the generic selector appears.

Related Topics

Create Generic Selector Page Reference

Specifying Generic Selector General Information

To specify general information for the generic selector:

1. In the General Information section, enter a name and description for the generic selector.
2. (Optional) If you plan to use service attributes in the generic selector rules, select the desired service from the **Service** list.
3. (Optional) If you plan to use event attributes in the generic selector rules, select the desired event from the **Event** list.
4. From the **Pricing Profile** list, select the **Convergent Usage** pricing profile.
5. The **Candidate Selection Mode** and **Candidate Selection Balance Element** fields are available only when you select an ECE pricing profile.
6. From the **Candidate Selection Mode** list, select how the Generic Selector resolves multiple matching result branches.

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7. If you select **MIN_IMPACT** or **MAX_IMPACT**, select the currency or noncurrency balance element for comparing the matching results from the **Candidate Selection Balance Element** list.

Related Topics

General Information Section

Creating a Generic Selector

Selecting Rule Attributes

Select the rule attributes that you want to use to define generic selector rules.

To select the rule attributes:

1. In the Select Fields for Rules section, click the **Add** icon in the table.

   The Select Field dialog box appears.

2. Select the fields that you want to use to define generic selector rules and click **OK**. Hold down the **Ctrl** key to make multiple selections.

   The selected fields are added to the table with default values.

   The same fields are used for all the rules in the generic selector. You can override the default values and set specific values in the rule to limit the fields that you want used in a rule.

3. In the **Value Type** column, select the type of value the field contains.
   - If you select **Value of Another Field**, in the **Default** column, select the other field.

4. In the **Default** column, enter the default value for the field.

   An asterisk (*) specifies the field can contain any value.

Related Topics

Select Fields for Rules Section

Creating a Generic Selector

Creating Generic Selector Rules

To create generic selector rules:

1. (Optional) In the Rules section, from the **Effective Period** list, click **Manage** to add or change an effective period.

   The effective period indicates when the rules in the generic selector are valid.

   The default effective period starts immediately and never ends.

2. Click the **Add** icon in the table to add a new rule.

   A row is added to the table.

3. (Optional) In the **Rule Name** column, enter a name for the rule.

4. In the subsequent columns, enter or modify the values for each of the rule attributes that you selected previously.

5. In the **Results** column, enter a string value to map to this rule. For example:

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- If the general selector rule determines that this is a Closed User Group (CUG) call, you could name the result **ClosedUserGroup**.
- If the general selector rule determines that this is a call to friends and family, you could name the result **Friends&Family**.
- If the general selector rule determines that this is a call with low QoS, you could name the result **LowQoS**.

The result is used in a charge to guide to a price.

The rules are evaluated in the order they are listed in the table. You can select a rule and move it up or down if you wish to reorder the rules. See "Working with Tables".

Related Topics

Rules Section

Creating a Generic Selector

Create Generic Selector Page Reference

Use the **Create Generic Selector** page to create rules that associate event, service, and account attributes and custom rules with a result string.

For a description of the fields, see:

- General Information Section
- Select Fields for Rules Section
- Rules Section

General Information Section

Use the General Information section to provide general information for the generic selector.

Field	Description
Name, Description	Enter a unique name and a description for the generic selector.
Service	(Optional) If you plan to use service attributes to create generic selector rules, select the desired service.
Event	(Optional) If you plan to use event attributes to create generic selector rules, select the desired event.
Pricing Profile	Select the **Convergent Usage** pricing profile.
Candidate Selection Mode	For an ECE pricing profile, select how to resolve multiple matching Generic Selector result branches. FIRST_MATCH uses the first match in configured order, MIN_IMPACT uses the branch with the lowest comparable impact, and MAX_IMPACT uses the branch with the highest comparable impact. FIRST_MATCH is the default.
Candidate Selection Balance Element	For MIN_IMPACT and MAX_IMPACT, select the currency or noncurrency balance element whose immediate impacts are compared. Impacts to other balance elements do not affect selection. PDC requires this value for impact-based modes. For FIRST_MATCH, PDC sends None, which the rating engine does not use.

Related Tasks

Creating a Generic Selector

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Select Fields for Rules Section

Use the Select Fields for Rules section to select the fields that you want to use in the generic selector rules.

Column	Description
Field	Displays the fields that you have selected to define price selector rules. The same fields are used for all the rules in the price selector. You can override the default values and set specific values in the rule to limit the fields that you want used in a rule.
Value Type	Select the type of value that the field contains. • **Single Value**: The field contains a single value. • **Value of Another Field**: The field contains the value of another field. If you select this option, in the **Default** column, select the other field.
Operator	Displays the relationship between the rule's default field value and the value in the account, service, event, or custom rule field. **Equals** or **Matches** appears next to the field names when you define the rules. The value of the field in the subscriber, service, event, or custom rule must match the value of the field in the rule.
Default	Enter a default value for the field. If the operator is **Equals**, an asterisk (*) specifies the field can contain any value. If the operator is **Matches**, a dot followed by an asterisk (.*) specifies the field can contain any value. If the field is limited to predefined values, a list of values appears. Select a value from the list. If **Value of Another Field** is selected for **Value Type**, the Select Field dialog box appears. In the Select Field dialog box, select the field you want.

Related Tasks

Selecting Rule Attributes

Rules Section

Use the Rules section to define Generic Selector rules and associate each rule with a result that guides a charge to a price. By default, the selector returns the result of the first rule that matches the event values. When Candidate Selection Mode is MIN_IMPACT or MAX_IMPACT, the selector evaluates all matching result branches and uses the Candidate Selection Balance Element to choose the result.

You can select a rule and move it up or down if you wish to reorder the rules.

Field or Column	Description
Effective Period	(Optional) Set the start and end dates to specify the period when the rules in the generic selector are valid. The default effective period starts immediately and never ends. From the **Effective Period** list, click **Manage** to add or change an effective period. See "Manage Effective Periods Dialog Box".

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Field or Column	Description
Priority	Enter the rule's priority. This table displays rules in numerical order, starting with priority 1. The rules are evaluated in order of priority. Reorder a rule in either of the following ways: • Click the **Move Rule Up** or **Move Rule Down** icon. • Change the rule's priority number. PDC moves the rule to its new place. The priority numbers of all rules affected by the move are changed.
Rule Name	(Optional) Enter a name for the rule.
Field Name	(Optional) Select an operator and enter a value. You can select one of the following operators: • Equals or Not Equals • In or Not In • Matches or Not Matches **Note**: The NOT operators can be used only if you are using ECE for the usage charging. To apply the rule to a subscriber, service, or event, the field value must match the corresponding subscriber, service, or event value. **Note**: An asterisk (*) matches all values in the corresponding subscriber, service, or event field.
Results	Enter a string value to map to this rule. For example: • If the general selector rule determines that this is a Closed User Group (CUG) call, you could name the result **ClosedUserGroup**. • If the general selector rule determines that this is a call to friends and family, you could name the result **Friends&Family**. • If the general selector rule determines that this is a call with low QoS, you could name the result **LowQoS**. The result is used in a charge to guide to a price.

Related Tasks

Creating Generic Selector Rules

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16

USC Selectors

A Usage Scenario (USC) selector contains rules that map existing impact categories to new impact categories based on usage attributes and custom rules (if applicable).

For example, if a call is a long-distance call, where the zone model is Geographical Zoning and the impact category is Long Distance, you can use a USC Selector to map that impact category to new impact categories based on usage attributes and custom rules. For example, if the call has usage type or custom rule Friends & Family, you can map the existing impact category to an impact category called Friends & Family.

You define USC selector rules by specifying values for the existing impact category, the event usage attributes and custom rules (if applicable) used to evaluate the USC rule, and the new impact category. When an event's usage attribute values and custom rules (if applicable) match a rule, the new impact category is returned by the USC selector.

To work with USC selectors, see the following topics:

- Creating a USC Selector
- Create USC Selector Page Reference

For overview information, see "About Selectors" in *PDC Creating Product Offerings*.

Creating a USC Selector

To create a USC selector:

1. In the Pricing section of the navigation pane, under **Models and Selectors**, click **Create USC Selector**.

   The **Create USC Selector** page appears.

2. In the General Information section, enter a name and description for the USC selector.

   The name must be unique across USC, APN, and charge selectors. For example, if you name a charge selector *Default Analyzer*, you cannot name a USC selector *Default Analyzer*.

3. From the **Pricing Profile** list, select the pricing profile to associate with the USC selector.

4. (Optional) From the **Applicable To** list, select the service to associate with the USC selector.

5. (Optional) From the **Event** list, select the event to associate with the USC selector.

   > **Note**
   >
   > Ensure that the event contains the attributes used in the USC selector for evaluating the rule.

6. (Optional) Add or change an effective period. In the Rules and Conditions section, from the **Effective Period** list, select **Manage** and specify an effective period.

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The effective period indicates the time period when the rules in the USC selector are valid.

The default effective period starts immediately and never ends.

7. Click the **Add** button in the table to add a new rule.
8. In the **Zone Model** column, select the zone model to use for this USC selector rule.
9. In the **Zone Impact Category** column, select the existing zone impact categories that you want to map to the new impact category in this USC selector rule.

   The default value .* specifies that the rule applies for all zone impact categories.
10. Select values for **Usage Class**, **Service Class**, and **Service Code** attributes to use for evaluating the rule.

    The default value .* specifies that the rule applies for all usage class, service class, and service codes.
11. Select the value for the **Usage Type** or **Custom Rule** attribute to use for evaluating the rule.

    The default value .* specifies that the rule applies for all usage types or custom rules.
12. (Optional) In the **Quantity Value** column, enter the maximum quantity of usage for the event.
13. (Optional) In the **Min Amt** and **Max Amt** columns, enter the minimum and maximum charge amounts for the event.
14. In the **Impact Category** column, select the new impact category to use for determining the price for the event.
15. (Optional) If you selected **Usage Type**, in the **New Usage Type** column, select the new usage type to assign to the event.
16. When you have completed adding the rules, click **Finish**.

    The overview page for the USC selector appears.

    The table lists the rules in the order that the rules are evaluated.

> **Note**
>
> To reorder the rules, click **Edit**, select a rule, and then click the **Move Rule Up** or **Move Rule Down** icon.

Related Topics

Create USC Selector Page Reference

Create USC Selector Page Reference

Use the **Create USC Selector** page to define rules to map existing impact categories to new impact categories based on usage attributes.

For a description of the fields, see:

- General Information Section
- Rules and Conditions Section

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General Information Section

Use the General Information section to provide general information for the USC selector.

Field	Description
Name, Description	Enter a unique name and a description for the USC selector. The name must be unique across USC, APN, and charge selectors. For example, if you name a charge selector *Default Analyzer*, you cannot name a USC selector *Default Analyzer*.
Pricing Profile	Select a pricing profile to associate with the USC selector.
Applicable To	(Optional) Select a service to associate with the USC selector.
Event	(Optional) Select an event to associate with the USC selector.

Related Tasks

Creating a USC Selector

Rules and Conditions Section

Use the Rules and Conditions section to create rules to map existing impact categories to new impact categories.

The table in this section lists the rules in the order that the rules are evaluated. The USC selector returns the impact category and usage type of the first rule that matches the values in the event.

You can select a rule and move it up or down if you wish to reorder the rules.

Field or Column	Description
Effective Period	(Optional) Set the start and end dates to specify a specific time period during which the rules in the USC selector are valid. The default effective period starts immediately and never ends. From the **Effective Period** list, click **Manage** to add or change an effective period. See "Manage Effective Periods Dialog Box".
Priority	Enter the rule's priority. This table displays rules in numerical order, starting with priority 1. The rules are evaluated in order of priority. Reorder a rule in either of the following ways: • Click the **Move Rule Up** or **Move Rule Down** icon. • Change the rule's priority number. PDC moves the rule to its new place. The priority numbers of all rules affected by the move are changed.
Rule Name	Enter a name for the USC selector rule.
Zone Model	Select the zone model to use for this USC selector rule.

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Field or Column	Description
Zone Impact Category	Select an operator and the existing zone impact categories that you want to map to the new impact category in this USC selector rule. The default value .* specifies that the rule applies for all zone impact categories. The valid operators are: • Matches • Not Matches **Note**: You can use Not Matches only if you are using ECE for the usage charging.
Usage Class	Select an operator and the existing usage class values to use for evaluating the rule. The default value .* specifies that the rule applies for all usage classes. The valid operators are: • Matches • Not Matches **Note**: You can use Not Matches only if you are using ECE for the usage charging.
Usage Type	(Online Usage and Offline Usage pricing profiles only) Select an operator and the existing usage type values to use for evaluating the rule. The default value .* specifies that the rule applies for all usage types. The valid operators are: • Matches • Not Matches **Note**: You can use Not Matches only if you are using ECE for the usage charging.
Custom Rule	(Convergent Usage pricing profile only) Select an operator and the existing custom rule to use for evaluating the rule. The default value .* specifies that the rule applies for all custom rules. The valid operators are: • Matches • Not Matches **Note**: You can use Not Matches only if you are using ECE for the usage charging.
Service Class	Select an operator and the existing service class values to use for evaluating the rule. The default value .* specifies that the rule applies for all service classes. The valid operators are: • Matches • Not Matches **Note**: You can use Not Matches only if you are using ECE for the usage charging.
Service Code	Select an operator and the existing service code values to use for evaluating the rule. The default value .* specifies that the rule applies for all service classes. The valid operators are: • Matches • Not Matches **Note**: You can use Not Matches only if you are using ECE for the usage charging.

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Field or Column	Description
Quantity Value	(Optional) Enter the maximum quantity of usage for the event, such as duration. The quantity of usage for the event must be less than or equal to the **Quantity Value**.
Min Amt	(Optional) Enter the minimum charge amount for the event. The charge amount for the event must be equal to or greater than the **Min Amount**.
Max Amt	(Optional) Enter the maximum charge amount for the event. The charge amount for the event must be less than or equal to the **Max Amount**.
Impact Category	Select the new impact category to use for determining the price for the event.
New Usage Type	(Optional) Select a new usage type to assign to the event.

Related Tasks

Creating a USC Selector

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17

APN Selectors

An Access Point Name (APN) selector consists of rules that map APNs to new impact categories based on event attribute values. You use APN selectors to redefine the impact category for events that are associated with specific APNs.

You define APN selector rules by specifying values for the APNs, the event attributes used to evaluate the APN rule, and the new impact category. When an event's attribute values match a rule, the new impact category is returned by the APN selector.

To work with APN selectors, see the following topics:

- Creating an APN Selector
- Create APN Selector Page Reference

For overview information, see "About Selectors" in *PDC Creating Product Offerings*.

Creating an APN Selector

To create an APN selector:

1. In the Pricing section of the navigation pane, under **Models and Selectors**, click **Create APN Selector**.

   The **Create APN Selector** page appears.

2. In the General Information section, enter a name and description for the APN selector.

   The name must be unique across APN, USC, and charge selectors. For example, if you name a charge selector *Default Analyzer*, you cannot name an APN selector *Default Analyzer*.

3. From the **Pricing Profile** list, select a pricing profile to associate with the APN selector.
4. From the **Zone Model** list, select one or more zone models to use for the APN selector.
5. In the Rules section, click the **Add** icon in the table to add a new rule.

   A row is added to the table.

6. In the **Rule Name** column, enter a name for the APN selector rule.
7. In the **APN Name** column, enter the APNs for which you want to define the new impact category.

   The default value **.*** specifies that the rule applies for all APNs.

8. In the **Service Code** column, select the service codes to use for evaluating the rule.

   The default value **.*** specifies that the rule applies for all service codes.

9. In the **Zone Impact Category** column, select the existing zone impact categories associated with the APNs.

   The default value **.*** specifies that the rule applies for all zone impact categories.

10. In the **Impact Category** column, select the new impact category to associate with the APNs.

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11. When you have completed adding the rules, click **Finish**.

    The overview page for the APN selector appears.

    The table lists the rules in the order that the rules are evaluated.

> **Note**
>
> To reorder the rules, click **Edit**, select a rule, and then click the **Move Rule Up** or **Move Rule Down** icon.

Related Topics

Create APN Selector Page Reference

Create APN Selector Page Reference

Use the **Create APN Selector** page to define rules to associate specific APNs with new impact categories.

For a description of the fields, see:

- General Information Section
- Rules Section

General Information Section

Use the General Information section to provide basic information for the APN selector.

Field	Description
Name, Description	Enter a unique name and a description for the APN selector. The name must be unique across APN, USC, and charge selectors. For example, if you name a charge selector *Default Analyzer*, you cannot name an APN selector *Default Analyzer*.
Pricing Profile	Select a pricing profile to associate with the APN selector.
Zone Model	Select one or more zone models to use for the APN selector.

Related Tasks

Creating an APN Selector

Rules Section

Use the Rules section create rules to associate specific APNs with new impact categories.

The table in this section lists the rules in the order that the rules are evaluated. The APN selector returns the impact category of the first rule that matches the values in the event. You can select a rule and move it up or down if you wish to reorder the rules.

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Column	Description
Priority	Enter the rule's priority. This table displays rules in numerical order, starting with priority 1. The rules are evaluated in order of priority. Reorder a rule in either of the following ways: • Click the **Move Rule Up** or **Move Rule Down** icon. • Change the rule's priority number. PDC moves the rule to its new place. The priority numbers of all rules affected by the move are changed.
Rule Name	Enter a name for the APN selector rule.
APN Name	Select an operator and the existing APN name to use for evaluating the rule. The default value **.*** specifies that the rule applies for all APNs. The valid operators are: • Matches • Not Matches **Note**: You can use Not Matches only if you are using ECE for the usage charging.
Service Code	Select an operator and the existing service codes to use for evaluating the rule. The default value **.*** specifies that the rule applies for all service codes. The valid operators are: • Matches • Not Matches **Note**: You can use Not Matches only if you are using ECE for the usage charging.
Zone Impact Category	Select an operator and the existing zone impact categories associated with the APNs. The default value **.*** specifies that the rule applies for all zone impact categories. Select the appropriate Not operator value from the available list of values in the Zone Impact Category.
Impact Category	Select the new impact category to associate with the APNs.

Related Tasks

Creating an APN Selector

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18

Tax Selectors

A tax selector consists of rules that associate account, service, profile, and event attributes with tax codes.

For information on using tax selectors, see:

- Creating a Tax Selector
- Create Tax Selector Page Reference

For overview information, see "About Selectors" in *PDC Creating Product Offerings*.

Creating a Tax Selector

To create a tax selector:

1. In the Pricing section of the navigation pane, under **Models & Selectors**, click **Create Tax Selector**.
2. Specify general information for the tax selector. See "Specifying Tax Selector General Information".
3. Select the attributes to use in the tax selector rules. See "Selecting Attributes for Tax Selector Rules".
4. Create rules for the tax selector. See "Creating Tax Selector Rules".

Related Topics

Create Tax Selector Page Reference

Specifying Tax Selector General Information

To specify general information for a tax selector:

1. In the Pricing section of the navigation pane, under **Models and Selectors**, click **Create Tax Selector**.

   The **Create Tax Selector** page appears.
2. In the General Information section, enter a unique name and a description for the tax selector.
3. From the **Service** list, select a service to associate with the tax selector.
4. From the **Event** list, select an event to associate with the tax selector.
5. From the **Rating Profiles** list, select one or more rating profiles to associate with the tax selector.
6. From the **Pricing Profile** list, select a pricing profile to associate with the tax selector.
7. Click **Next**.

   The Rule Attributes tab appears.

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Related Topics

General Information Section

Selecting Attributes for Tax Selector Rules

To create rules for a tax selector, you must first specify the customer, service, event, and profile attributes to use in the rules.

To specify attributes for tax selector rules:

1. Go to the Rule Attributes tab of the **Create Tax Selector** page.
2. In the Select Fields for Rules section, click the **Add** icon in the table toolbar.

   The Add Field dialog box appears.
3. Select at least one field to use in the rules.

   To select multiple fields at the same time, press and hold the **CTRL** key during selection.

   > **Note**
   >
   > The selected fields are included in every rule defined for the tax selector, but in each rule, you can override a field's default value.

4. Click **OK**.

   The selected fields are added to the table, with one field per row.
5. Click the **Value Type** cell, and select a value type from the list.

   The **Operator** cell is automatically set to **Equals** (for a value type of Single Value) or **Contained in** (for a value type of List of Values).
6. In the **Default** cell, do one of the following:
   - If you selected **Single Value**, click the cell and enter a value.
   - If you selected **List of Values**, click the cell and do the following:
     a. In the Enter Value dialog box, click the **List of Values** cell and enter a value.
     b. For each additional value, click the **Add** icon and enter a value in the new cell.
     c. Click **OK**.

        The values, separated by semicolons, are added to the cell.
7. Click **Next**.

   The **Rules** tab appears.

Related Topics

Rule Attributes Section

Creating Tax Selector Rules

Tax selectors use rules to determine which tax code to apply to an event.

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The selector evaluates rules in the order they appear in the table. You can change the order by moving a row up or down, or by entering a different priority number.

To create a tax selector rule:

1. Go to the Rules tab of the **Create Tax Selector** page.
2. (Optional) From the **Effective Period** list, click **Manage** to add or change the effective period.

   The effective period indicates when the rules are valid. The default effective period starts immediately and never ends.
3. If the selector contains multiple effective periods, select one.
4. In the table, click the **Add** icon in the table toolbar.

   A row is added to the table.

   > **Tip**
   >
   > You can also add a row by clicking the **Actions** menu and then selecting **Insert Rule Above** or **Insert Rule Below**.
5. Click the **Priority** cell, and enter the priority number.
6. Click the **Rule Name** cell, and enter a unique name for the rule.
7. Click the cell for each attribute, and enter a value.
8. In the **Tax Code** cell, select a tax code.
9. Click **Finish**.

You can edit or validate the tax selector.

Related Topics

Rules Section

Manage Effective Periods Dialog Box

Create Tax Selector Page Reference

Use the **Create Tax Selector** page to create rules that associate subscriber, service, profile, and event attributes with tax codes.

For a description of the fields, see the following:

- General Information Section
- Rule Attributes Section
- Rules Section

General Information Section

Use the General Information section to provide a name and description for the tax selector and to associate it with a service, event type, rating profile, and pricing profile.

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Field	Description
Name, Description	Enter a unique name and a description. The name must be unique across tax selectors.
Service	Select the service type to which the tax selector applies.
Event	Select the event type to which the tax selector applies.
Rating Profiles	Select the rating profile for the tax selector.
Pricing Profile	Select the pricing profile for the tax selector.

Related Tasks

Creating a Tax Selector

Specifying Tax Selector General Information

Rule Attributes Section

Use the Rule Attributes section to select the subscriber, service, profile, and event attribute fields to use in the tax selector rules.

Select Fields for Rules Table

The table lists the attribute fields to include in the rules. In the table, you can add or delete fields, add or remove columns, or reorder the columns. See "Working with Tables" for more information.

Click the **Add** icon to add fields using the Select Field dialog box. See "Select Field Dialog Box".

Column Name	Description
Field	Displays the name of the customer, service, event, or profile attribute field you specified in the "Select Field Dialog Box".
Value Type	Select one of the following: • **Single Value**: Specifies that the field contains only one valid value. • **List of Values**: Specifies that the field can contain one of multiple values.
Operator	Displays the operator type, which is dependent on the **Value Type** entry. • **Equals**: Displayed for the **Single Value** type. • **Contained in List**: Displayed for the **List of Values** type.
Default	Specify a default value for the field. If the operator is **Equals**, enter a value. If the operator is **Contained in List**, clicking on the cell opens the Select Field dialog box. In the Select Field dialog box, enter a value in each row. **Note**: The default value of asterisk (*) specifies the field can contain any value.

Select Field Dialog Box

Use the Select Field dialog box to specify the attribute fields to evaluate. The dialog box includes one or more of the following categories: **Customer**, **Service**, **Event**, and **Profile**.

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Expand a category to view the attribute fields you can add to a rule. Select a field name to add it to your rule. To select multiple fields at the same time, press and hold the CTRL key during selection.

Related Tasks

Selecting Attributes for Charge Selector Rules

Rules Section

Use the Rules section to define tax selector rules.

Click the **Add** icon in the table to add rules.

The table in this section lists the rules in the order that they are evaluated. The tax selector returns the tax code of the first rule that matches the values in the event.

You can select a rule and move it up or down if you wish to reorder the rules.

Column	Description
Effective Period	(Optional) Set the start and end dates to specify the period when the rules in the selector are valid. The default effective period starts immediately and never ends. From the **Effective Period** list, click **Manage** to add or change an effective period. See "Manage Effective Periods Dialog Box".
Priority	Enter the rule's priority. This table displays rules in numerical order, starting with priority 1. The rules are evaluated in order of priority. When a rule includes multiple attributes (fields), BRM processes the attributes from left to right. Reorder a rule in either of the following ways: • Click the **Move Rule Up** or **Move Rule Down** icon. • Change the rule's priority number. PDC moves the rule to its new place. The priority numbers of all rules affected by the move are changed.
Rule Name	Enter a unique name for the rule.
Field Name	Enter a value. To apply the rule to an event, the subscriber, service, profile, or event value must match the corresponding value. **Note**: An asterisk (*) matches all values in the corresponding field.
Tax Code	Select the name of the tax code to associate with the rule.

Related Tasks

Creating Tax Selector Rules

Manage Effective Periods Dialog Box

Use the Manage Effective Periods dialog box to add or change effective periods.

- To add a new effective period, click the **Add** icon. In the Add New Effective Period dialog box, enter a start date or click the date selector to select a date.

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- To change the effective period that starts immediately, deselect **Immediately** and enter a new start date or click the date selector to select a date.

Related Tasks

Creating Tax Selector Rules

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19

Tax Exemption Selectors

A tax exemption selector consists of rules that associate account, service, profile, and event attributes with tax exemption codes. You use a tax exemption selector in a charge offer to apply tax exemptions based on the rule results.

> **Note**
>
> You must create all tax exemption codes before creating your tax exemption selectors. See "Creating Tax Exemption Codes".

For information on using tax exemption selectors, see:

- Creating a Tax Exemption Selector
- Create Tax Exemption Selector Page Reference

For overview information, see "About Selectors" in *PDC Creating Product Offerings*.

Creating a Tax Exemption Selector

To create a tax exemption selector:

1. If you haven't done so already, create your tax exemption codes. See "Creating Tax Exemption Codes".
2. In the Pricing section of the navigation pane, under **Models & Selectors**, click **Create Tax Exemption Selector**.
3. Specify general information for the tax exemption selector. See "Specifying Tax Exemption Selector General Information".
4. Select the attributes to use in the tax exemption selector rules. See "Selecting Attributes for Tax Exemption Selector Rules".
5. Create rules for the tax exemption selector. See "Creating Tax Exemption Selector Rules".

> **Note**
>
> You can select multiple events in the tax exemption selector, but they are saved to the server only after you add the attributes related to those events. Even though multiple events are saved, the view mode of the tax exemption selector may display only one event.

Related Topics

Create Tax Exemption Selector Page Reference

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Specifying Tax Exemption Selector General Information

To specify general information for a tax exemption selector:

1. In the Pricing section of the navigation pane, under **Models and Selectors**, click **Create Tax Exemption Selector**.

   The **Create Tax Exemption Selector** page appears.
2. In the General Information section, enter a unique name and a description for the tax exemption selector.
3. From the **Service** list, select a service to associate with the tax exemption selector.
4. From the **Events** list, select one or more events to associate with the tax exemption selector.
5. From the **Rating Profiles** list, select one or more rating profiles to associate with the tax exemption selector.
6. From the **Pricing Profile** list, select a pricing profile to associate with the tax exemption selector.
7. Click **Next**.

   The Rule Attributes tab appears.

Related Topics

General Information Section

Selecting Attributes for Tax Exemption Selector Rules

To create rules for a tax exemption selector, you must first specify the customer, service, event, and profile attributes to use in the rules. The attributes available depend on the service, event, rating profile, and pricing profile you selected.

To specify attributes for tax exemption selector rules:

1. Go to the Rule Attributes tab of the **Create Tax Exemption Selector** page.
2. In the Select Fields for Rules section, click the **Add** icon in the table toolbar.

   The Select Field dialog box appears.
3. Select at least one field to use in the rules.

   To select multiple fields at the same time, press and hold the **CTRL** key during selection.

   > **Note**
   >
   > The selected fields are included in every rule defined for the tax exemption selector, but in each rule, you can override a field's default value.

4. Click **OK**.

   The selected fields are added to the table, with one attribute field per row.
5. Click the **Value Type** cell, and select a value type from the list.
6. Click the **Operator** cell, and select an operator from the list.

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7. In the **Default** column, do one of the following:
   - If you selected **Single Value**, enter a value directly in the table cell.
   - If you selected **List of Values**:
     a. Click the cell.

        The Enter Value dialog box appears.

     b. Click the **List of Values** cell, and enter a value in the table cell.
     c. To add other values to the list, click the **Add** icon and enter values.
     d. Click **OK**.

        The values, separated by semicolons, are added to the cell.
8. Click **Next**.

   The Rules tab appears.

Related Topics

Rule Attributes Section

Creating Tax Exemption Selector Rules

Tax exemption selectors use rules to determine which tax exemption code to apply to an event.

The selector evaluates rules in the order they appear in the table. You can change the order by moving a row up or down, or by entering a different priority number.

To create a tax exemption selector rule:

1. Go to the Rules tab of the **Create Tax Exemption Selector** page.
2. (Optional) From the **Effective Period** list, click **Manage** to add or change the effective period.

   The effective period indicates when the rules are valid. The default effective period starts immediately and never ends.
3. If the selector contains multiple effective periods, select one.
4. In the table, click the **Add Rule** icon in the table toolbar.

   A row is added to the table.

   > **Tip**
   >
   > You can also add a row by clicking the **Actions** menu and then selecting **Insert Rule Above** or **Insert Rule Below**.

5. Click the **Priority** cell, and enter the priority number.
6. Click the **Rule Name** cell, and enter a unique name for the rule.
7. Click the cell for each attribute, and enter a value.
8. In the **Tax Exemption Code** cell, select a tax exemption code.
9. Click **Finish**.

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Related Topics

Rules Section

Create Tax Exemption Selector Page Reference

Use the **Create Tax Exemption Selector** page to create rules that associate subscriber, service, profile, and event attributes with tax exemption codes.

For a description of the fields, see the following:

- General Information Section
- Rule Attributes Section
- Rules Section
- Manage Validity Period Dialog Box

General Information Section

Use the General Information section to provide a name and description for the tax exemption selector and to associate it with a service, event type, rating profile, and pricing profile.

Field	Description
Name, Description	Enter a unique name and a description. The name must be unique across tax exemption selectors.
Service	Select the service type to which the tax exemption selector applies.
Events	Select one or more event types to which the tax exemption selector applies.
Rating Profiles	Select one or more rating profiles for the tax exemption selector.
Pricing Profile	Select the pricing profile for the tax exemption selector.

Related Tasks

Creating a Tax Exemption Selector

Specifying Tax Exemption Selector General Information

Rule Attributes Section

Use the Rule Attributes section to specify the account, service, event, and profile attributes to include in your tax exemption selector rules.

For a description of the subsections in the Rule Attributes section, see:

- Select Fields for Rules Table
- Select Field Dialog Box

Select Fields for Rules Table

The table lists the attribute fields to include in the rules. In the table, you can add or delete fields, add or remove columns, or reorder the columns. See "Working with Tables" for more information.

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Click the **Add** icon to add fields using the Select Field dialog box. See "Select Field Dialog Box".

Column Name	Description
Field	Displays the name of the customer, service, event, or profile attribute field you specified in the "Select Field Dialog Box".
Value Type	Select one of the following: • **Single Value**: Specifies that the field contains only one valid value. • **List of Values**: Specifies that the field can contain one of multiple values.
Operator	Displays the operator type, which is dependent on the **Value Type** entry. • **Equals**: Displayed for the **Single Value** type. • **Contained in List**: Displayed for the **List of Values** type.
Default	Specify a default value for the field. If the operator is **Equals**, enter a value. If the operator is **Contained in List**, clicking on the cell opens the Select Field dialog box. In the Select Field dialog box, enter a value in each row. **Note**: The default value of asterisk (*) specifies the field can contain any value.

Select Field Dialog Box

Use the Select Field dialog box to specify the attribute fields to evaluate. The dialog box includes one or more of the following categories: **Customer**, **Service**, **Event**, and **Profile**.

Expand a category to view the attribute fields you can add to a rule. Select a field name to add it to your rule. To select multiple fields at the same time, press and hold the CTRL key during selection.

Related Tasks

Creating a Tax Exemption Selector

Selecting Attributes for Tax Exemption Selector Rules

Rules Section

Use the Rules section to associate each rule to a tax exemption code.

Click the **Add** icon in the table to add rules.

The table in this section lists the rules in the order that the selector evaluates them. The selector returns the tax exemption code of the first rule that matches the values in the event.

You can select a rule and move it up or down if you wish to reorder the rules.

Column	Description
Effective Period	(Optional) Set the start and end dates to specify the period when the rules in the selector are valid. The default effective period starts immediately and never ends. From the **Effective Period** list, click **Manage** to add or change an effective period. See "Manage Effective Periods Dialog Box".

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Column	Description
Priority	Enter the rule's priority. This table displays rules in numerical order, starting with priority 1. The rules are evaluated in order of priority. When a rule includes multiple attributes (fields), BRM processes the attributes from left to right. Reorder a rule in either of the following ways: • Click the **Move Rule Up** or **Move Rule Down** icon. • Change the rule's priority number. PDC moves the rule to its new place. The priority numbers of all rules affected by the move are changed.
Rule Name	Enter a unique name for the rule.
Field Name	Enter a value. To apply the rule to an event, the subscriber, service, profile, or event value must match the corresponding value. **Note**: An asterisk (*) matches all values in the corresponding field.
Tax exemption code	Select the name of the tax exemption code to associate with the rule.

Related Tasks

Creating a Tax Exemption Selector

Creating Tax Exemption Selector Rules

Manage Effective Periods Dialog Box

Use the Manage Effective Periods dialog box to add or change effective periods.

- To add a new effective period, click the **Add** icon. In the Add New Effective Period dialog box, enter a start date or click the date selector to select a date.
- To change the effective period that starts immediately, deselect **Immediately** and enter a new start date or click the date selector to select a date.

Related Tasks

Creating a Tax Exemption Selector

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