

# Oracle® Communications Launch Cloud Service User's Guide



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# About This Content

This guide describes the functionality and user flows of your application. If you are looking for information on performing day-to-day tasks in your Launch Cloud Service application, then this guide is for you.

## Audience

This guide is primarily aimed at product managers, marketing managers, and product catalog administrators.

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## Related Resources

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

| Guide                                                       | Description                                                                      |
|-------------------------------------------------------------|----------------------------------------------------------------------------------|
| <i>Launch Cloud Service Implementation Guide</i>            | Describes tasks to set up Launch Cloud Service and its related systems.          |
| <a href="#">REST API Reference for Launch Cloud Service</a> | Describes how you can use REST APIs to view and manage product catalog entities. |

## Conventions

The following text conventions are used in this document.

| Convention      | Meaning                                                                                                                                |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------|
| <b>boldface</b> | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.         |
| <i>italic</i>   | Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.                          |
| monospace       | Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter. |

# 1

## Launch Overview

### Get Started with Launch

Use this topic to learn how to use the Launch application for centrally designing and deploying your catalog definitions.

What you can do using the Launch application will depend on your role. These roles and privileges are set up by your administrator. For more information, see *Set Up Users and Roles* in *Launch Cloud Service Implementation Guide*.

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

[Table 1-1](#) summarizes what you can do using each work area in the Launch application.

**Table 1-1 Work Areas in Launch Application**

| Work Area            | Description                                                                                                                                                                                                                                                                                                 |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Offer Management     | The Offer Management work area enables you to create and manage offers including offer design, revision, cloning, bulk update, and so on. You use the guided flow for offer creation to traverse through the various options that include defining attributes, pricing, terms, rules, approvals, and so on. |
| Promotion Management | The Promotion Management work area enables you to create promotions with the related events and benefits.                                                                                                                                                                                                   |
| Workbench            | Use this work area to view and manage product specifications, service specifications, attributes, and custom profile specifications.                                                                                                                                                                        |
| Administration       | The Administration work area enables you to create and deliver product catalogs across multiple channels.                                                                                                                                                                                                   |
| Reports              | Gain real-time insights into the transactional aspects of catalog management. Built using the Oracle Transactional Business Intelligence (OTBI), the Dashboards for Initiatives and Product Offers provide summary and detailed reporting capabilities in these two areas.                                  |

# 2

## Catalog Entities

### How Entities Work Together

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

### Types of Entities

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

**Table 2-1 List of Entities**

| Entity                | Definition                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Initiative            | An initiative or project encapsulates catalog definitions so that you can publish these entities to the spoke systems.<br>For more information, see <a href="#">Initiatives Overview</a> .                                                                                                                                                                                                  |
| Service Specification | Service specifications reflect the characteristics associated to a service, for example, data service or voice service.<br>For more information, see <a href="#">Service Specification Overview</a> .                                                                                                                                                                                       |
| Product Specification | Product specification, also known as product type, consists of a detailed description of tangible or intangible characteristics that are made externally available through the product offer. These are the attributes associated with a product offer and define the technical aspects of the product offer.<br>For more information, see <a href="#">Product Specification Overview</a> . |
| Attributes            | Attributes are characteristics which can be used on a product specification and service specification. Attributes are a top-level entity which can then be re-used in product specification and service specification characteristics.<br>For more information, see <a href="#">Attributes Overview</a> .                                                                                   |

Table 2-1 (Cont.) List of Entities

| Entity                  | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Product Offers          | <p>Product offer is an item that can be sold or ordered from the provider of the catalog or can also be tracked as an asset. A product offer can be a simple offer or bundle offer. A simple product offer has attributes, features, and characteristics but does not contain other product offers. A bundle product offer is an assembly of two or more product offers.</p> <p>For more information, see <a href="#">Product Offer Guided Flow</a>.</p>            |
| Product Offer Pricing   | <p>Product offer pricing refers to different pricing structures that you associate with the product offer. For example, a one-time, recurring, usage fees, attribute-based pricing, and so on.</p> <p>For more information, see <a href="#">Pricing Overview</a>.</p>                                                                                                                                                                                               |
| Promotions              | <p>Promotions or promotional events refer to additional discounts, reductions, or awards on offers for customers who meet predefined criteria.</p> <p>For more information, see <a href="#">Promotions Overview</a>.</p>                                                                                                                                                                                                                                            |
| Catalogs and Categories | <p>Category is used to group product offers into logical containers. A product category can contain other categories.</p> <p>Each product offering in a product catalog combines pricing and availability information with product specifications that describe the relationships between products, the services used to realize the products, and the resources they require.</p> <p>For more information, see <a href="#">Create Catalogs and Categories</a>.</p> |
| Rules                   | <p>Rules are different types of conditions that you can set for product offers and product specifications. Using rules you can set conditions that validate the eligibility or compatibility of offers or specifications, verify the downgrade or upgrade from the defined terms, or check recommendations.</p> <p>For more information, see <a href="#">Rules Overview</a>.</p>                                                                                    |
| Product Lines           | <p>Product lines group similar product offers.</p> <p>For more information, see <a href="#">Product Lines Overview</a>.</p>                                                                                                                                                                                                                                                                                                                                         |

## Understanding Entity Relationships

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

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

Product offers are created as simple or bundle offers. A simple offer is an atomic offer, whereas a bundle offer is a grouping of simple offers or nested bundle offers. An example of a bundle

offer is a home-based internet service that combines three simple offers, such as internet connection, e-mail service, and home security.

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

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

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

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

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

## Entity Validations

Validations are enforced into top-level entities to ensure that the referenced or included resources must be valid during the effective period of the top-level resource. For example, a product specification valid from Oct 1, 2018 to Dec 31, 2018 cannot be used to create an offer valid from Nov 1, 2018, to Mar 30, 2019. The product offering can only be created if the validity period of the product specification covers the validity period of the offer.

## Search and Filter Entities

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

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

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

## Support for Multiple Business Units

A Communications Service Provider (CSP) organization can have many Business Units (BU) based on their regional and/or line of business that they operate upon. Having such segregations allow the CSPs to manage and operate their business needs, separated by their business units. Each BU can have its own set of catalog definitions for products and services and/or can share the common ones based on how their BUs need to operate.

Launch supports multiple business units to share or have exclusivity for product offerings and price lists. You can restrict the usage of product offers and price lists to a particular BU for their specific market offerings or open it up for usage across all or share amongst a few BUs. During product offering creation, the users BU would be set by default. Additionally, you could add more BUs to promote data sharing. During bundle product offering creation, the components would belong to the user BU only and will not contain components from different BU's. The same is applicable to price list entity. Business unit striping does not apply to other entities such as product offering price, specifications, attributes, catalog, categories, rules, terms, initiatives, and so on. These entities are common across all BUs.

Multiple BU considerations:

- Existing users who do not have a BU association can view all offers and price lists
- New users who need to be restricted to a BU, to have BU added to user profile
- Should you need to have a default BU, that can be added too using profile options
- Maintain Organization to BU as 1:1
- Users can remove the BU association to make it available for all BUs

For example, a CSP has 2 BUs (BU1 and BU2). Offers and price lists can be created for BU1 to be exclusive to BU1. Offers and price lists created as part of BU2 can be made exclusive to BU2.

This allows multiple business units to have sharing and exclusivity options during modeling market offers.

The following are the high level steps involved in setting up a Business Unit:

1. Create Organization
2. Create Business Unit
3. Create Resource Organization
4. Create Resource User
5. Associate BU and User to Organization
6. Link Resource User to Security User (if security user is already created)

For setup details on business units, see *Launch Cloud Service Implementation Guide*.

The following are the access requirements:

- Communications Catalog Product Manager
- Communications Catalog Administrator

# 3

## Initiatives

### Initiatives Overview

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

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

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

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

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

#### Note

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

#### Related Topics

- [Manage Entity Lifecycle Using Initiatives](#)

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

- [Publish Initiatives to Spoke Systems](#)  
Use this topic to know how you can publish an initiative to the spoke systems.

## Teams and Initiatives

You can use the Teams functionality to manage and collaborate on Initiatives. Teams construct is where group of users come together to achieve a common goal of working on an Initiative targeted for market release. This is applicable to the design time catalog, where, for a Communications Service Provider (CSP) to roll out offers to the market, a group of users such as the product managers, technical specialists, and so on, work and collaborate together. This enables focused outcomes. In Launch a team of users will be assigned to work on an initiative.

Product Manager and Product Specialist user roles will see a new dashboard as landing pages. This provides improved collaboration, streamlined communication, and enhanced productivity.

## Rollback of Market Releases

Rollback process allows Communications Service Provider (CSP) to undo or revert offers and promotions released to the market. The rollback is intended to eliminate manual interventions and to operate at speed. As releasing an offer or promotion to the market is the primary objective for a CSP from a time and cost perspective, rollback is equally important to mitigate revenue loss and poor customer experience. The objective is to ensure that no incorrect offers are ordered in the ordering system. With this capability, CSPs can revert to a last known good state after a bad deployment.

Similar to the release process, rollback is also applicable to the Initiative contents. It supports:

- Partial Rollback: Few offerings/promotions from the launched Initiative
- Full Rollback: All offerings/promotions from the launched Initiative

Add the ATC\_LAUNCHX\_MANAGE\_ENTITY\_ROLLBACK privilege to the catalog administrator user to enable rollback capability. The feature allows business continuity and risk mitigation during market releases.

## Create an Initiative

Here's how you create an initiative.

1. Click the **Administration** tab and then click **Initiatives**. The **Initiatives** page appears.  
Click **Create Initiative**.
2. On the **New Initiative** page, enter the name and description. The ID is automatically generated for you.
3. Specify whether the initiative requires approval.
4. Click **Create**.

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

## Manage Initiatives

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

### View Initiatives

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

- Initiative details with the basic information.
- All the product offers and entities that are included in an initiative.
- Publishing activities that an initiative has gone through. You can also see the different spoke systems where this initiative was published and the publish status of the initiative in those spoke systems.

### Edit Initiatives

Click ellipses and then select Edit to edit an initiative. While editing an initiative, you can update the name and description of the initiative.

### Manage Lifecycle Status

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

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

### Seek Approvals Using Initiatives

Optionally, you can mandate approvals for offers associated to an initiative. For more information about offer approvals, see [Manage Offer Approvals](#).

### Related Topics

- [Publish Initiatives to Spoke Systems](#)  
Use this topic to know how you can publish an initiative to the spoke systems.

## Publish Initiatives to Spoke Systems

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

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

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

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

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

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

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

#### Related Topics

- [Manage Entity Lifecycle Using Initiatives](#)  
Use this topic to understand how you can manage the publishing and the lifecycle status of catalog entities using initiatives.
- [Manage Offer Approvals](#)  
You can use the preconfigured approval flow in Launch to run your offers past the approvers within your resource organization.

# 4

## Service Specifications

### Service Specification Overview

Use this topic to understand what a service specification means.

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

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

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

#### Define and use a service specification

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

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

#### Related Topics

- [Product Specification Overview](#)  
Use this topic to understand what product specifications are and how you create and manage them in the Launch application.
- [Product Offer Guided Flow](#)  
Use this topic to understand how you can use the guided flow in the Launch application to create product offers. The following are the high-level steps in the guided flow that you may use for creating an offer:

### Manage Service Specifications

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

For more information on using REST APIs, see [Use REST APIs to Create Catalog Entities](#).

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

To create and edit service specifications from the user interface:

1. Navigate to **Workbench** and then click **Specifications**. The **Specifications** page appears.
2. Click **Create Service Specification**.
3. In the **Identifying information** section, specify the name, description, and select the Initiative to which the service specification is associated.

 **Note**

A default ID is generated for you, but you also specify your own ID.

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

# 5

## Product Specifications

### Product Specification Overview

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

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

- At design time including their characteristics, characteristic values, characteristic layout structure, and restrictions.
- When customers are ordering or configuring them, including their configuration layout, configuration model, and transactional attributes.
- When product offers are provisioned, including their service specification and the constraints on their billing specification.

Product specifications also control how product offers can be priced.

#### Define and use a product specification

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

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

- Create product specifications and use them as you create a product offer.
- View, edit, delete, revise, retire, clone, and obsolete existing product specifications.
- Create new product specifications by including simple or aggregate characteristics.
- Manage product specifications by editing or removing both simple and aggregate characteristics. Specify the short name when adding the attributes which will be used by the product offering when instantiated.
- Associate your product specifications to an initiative.
- Change the lifecycle status of product specifications. Associate your product specifications with additional specifications, such as:
  - Parent product specifications: Associate and inherit the attributes from parent product specifications to the product specification that you are creating and view these in the Inherited Attributes section. When you create offers using product specifications, you can use the attributes from the specification as well as the ones inherited from the parent specification. This enables you to create a hierarchy of product specifications through inheritance which promotes reusability and proliferation of product specifications.

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

Map the characteristics of product specification and service specification using the existing user experience for product specifications. Use these mappings to pass values between the product order and service order during fulfillment.

The following patterns of mappings are supported:

- Services having 1:1 relationship between product specification and service specification
- Services having 1:M relationship between service specification and product specification
- Services having 1:M relationship between product specification and service specification

#### Example:

Service specification is Mobile Messaging CFS. The characteristics are:

- ICCID, IMEI, MMSIncoming, MMSOutgoing, SMSIncoming, and SMSOutgoing

Product Specification is SIM Card PS. The characteristics are:

- ICCID, IMEI, TN, and TN Type
- Map Mobile Messaging CFS to the SIM Card PS in product service specification user experience
- Map the characteristics of product specification.ICCID to service specification .ICCID
- Create a SKU template using the attributes of the parent product specification or your current product specification and specify the SKU code formats. SKU part numbers help you group similar product definitions (simple physical goods with variant attributes), and allow you to generate SKU numbers for the different combinations of product attributes. Here's an example. A physical device, such as, a smart phone can be sold in three colors (black, white, gold) with three storage types (64GB, 128GB and 256GB). This results in nine different combinations that can be purchased. Each combination requires a part number that can be used by the back end fulfillment system when purchased. Now, instead of creating nine different product definitions, a single product definition leveraging product

attribute-based pricing with its own part number can be assigned to each combination of attributes. This enables you to efficiently manage device variant pricing and fulfillment.

### Related Topics

- [Service Specification Overview](#)  
Use this topic to understand what a service specification means.

## Create a Product Specification

To create a product specification:

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

### Add Attributes

You can add an attribute with the short name. Go to the overflow menu of the added attributes and you should be able to add mappings to the attributes. You can create attributes at the time of product specification creation. If you do not find the attribute you are looking for, you can now create the attribute at the time of specification creation.

### Create a SKU Template

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

1. On the Create Product Specification page, SKU template section, click **Add SKU Template**.
2. On the New SKU Template page, provide a name, description, and add the required attributes.
3. Click **Add**.  
A SKU Code section appears on the New SKU Template page.
4. Add ID and values for each of the SKUs that you just created.
5. Optionally, you can also click **Add Images** to add an image to your SKU template.
6. Click **Add**.

# 6

## Attributes

### Attributes Overview

Attributes are characteristics which can be used on a product specification and service specification. Attributes are a top-level entity which can then be re-used in product specification and service specification characteristics. Attributes support the full entity lifecycle management just like other top-level entities. Attributes have two parts: the name of the attribute and its possible values.

Attributes can be of simple type or aggregate type.

A simple attribute is just a single characteristic. For example, color is a simple attribute which can be used on a product specification with values RED, BLUE, and GREEN.

Aggregate attributes are group of attributes. For example, dimension is an aggregate attribute of length, breadth, and height. Include data types in attributes like strings, integers, boolean, date, date time, and decimal. Provide a range of values for numeric data types. You can also provide additional information like isConfigurable (values can be configured), extensible (values can be extended by spoke systems), isUnique, cardinality, and any default value associated with the characteristic. You can also mask any information that is sensitive.

You can define attributes by navigating to Workbench and then the Attributes section.

# Custom Profile Specification

## Custom Profile Specification

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

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

### Create Custom Profile Specification

To create a custom profile specification:

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

To add a new attribute:

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

To add an existing attribute:

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

# 8

## Product Offers

### Product Offer Guided Flow

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

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

#### General Information

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

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

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

- Chargeshare offer - Ability to configure an atomic offering with the billing type set to chargeshare and the product type as others. A chargeshare offer contains one or more charge shares that specify how charges are distributed among the members of a group. Charge sharing enables an account to sponsor the charges of other accounts within the group. The sponsoring account receives the balance impact of charges incurred by the group member accounts. You can configure the chargeshare offer, and downstream systems should manage the sponsorship group accordingly. First, create a zero-value fee, similar to a discount offering, and configure the chargeshare model. The supported models are fixed and percentage charge shares. The fixed charge share specifies a fixed value that is shared between the group member and the sponsor account, while the percentage

charge share specifies the percentage value shared among the group member and sponsor account. Configure only a single charge share for a given fee type. The chargeshare offer can then be included in a bundled offering.

**Example:** SD chargeshare offering with billing type set to chargeshare. Configure a one-time chargeshare with 100% allocation to the sharer's balance and 100% allocation to the member's balance.

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

**Note**

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

- Set up this offer to be configurable at runtime sales catalogs.
- Track this offer as an asset.
- Define this product offering as shippable for physical goods.
- Allow manual override to allow runtime manual adjustments for shipping or other purposes.

**Note**

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

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

### Collateral Information

Use collateral information to attach digital content to your offer.

- You can optionally associate digital content to your offer. Before you associate digital content to your offers, you must add the digital content to your third party content management system. Integrate Launch Cloud Service with the third party content management system. For more details, see *Launch Cloud Service Integration Guide*. Once integration is done, you should be able to associate collaterals and images from your CMS.

**Note**

You publish the content and associate only published content to Launch Cloud Service entities.

- You can add agreement templates to your offer.

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

An agreement typically includes detailed descriptions of pricing, terms, limitations, coverage, conditions, legal rights, processes, and guidelines. Agreements are typically authored by a communication service provider's legal, risk, or compliance teams as agreement templates.

You can optionally associate agreements to your offer. Before you associate agreement to your offers, you must add the agreement to your third party content management system. Integrate Launch Cloud Service with the third party content management system. For more details, see *Launch Cloud Service Integration Guide*. Once integration is done, you should be able to associate collaterals and images from your CMS.

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

**Marketing Information**

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

- Storefront Banners:** A banner is a way to highlight an offer to make it stand out while displaying a variety of offers, both on the digital channel of engagement and for the agent assisted ordering channel. For example, while displaying 5+ offers in the storefront, highlighting one offer as 5% early bird discount or available only today, with a time period validity is the main objective of a banner.
- Offer Marketing Features:** A marketing feature describes important characteristics of a commercial offer that stands out among the other features pertaining to the offer. For example, data transfer rate or the storage capacity. You can create a list of these marketing features for an offer under marketing information.

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

**Attributes**

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

Here you can do one of the following:

- View the attribute values setup at the product type level that are inherited by the product offer.

- Use Set Restrictions to set restrictions on the list of values available at runtime on the configurable attributes.
- Set values for any free form attributes.

### Components

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

You can filter bundle components based on product line - Filter based on the product line configured for the offering. Fetch offers matching the product line and the ones that do not have a product line. Enable or disable through entity profile.

Here's what you can do using components:

- For a bundle offer of type package, you can create an aggregation.
- For a bundle offer of type commercial or service bundle, you can create option groups.
- You can set and override the cardinality.
- Override the commitment terms of the components of a package.  
A component in a package can contain commitment terms that can be different from the commitment terms of a package. For example, consider two packages with commitment term requirement of 24 and 12 months and they include a commercial bundle with a commitment term of 18 months. The packages can override the commitment term of 18 months of the included commercial bundle to 24 and 12 months as per their requirement. You can override the commitment term at the leaf level component as well.
- A package containing multiple services can be ordered together while allowing the subscriber to modify or disconnect individual services. There are runtime scenarios that allow a subscriber to cancel or modify one or more services with applicable rules and penalties. You can now configure what kind of action the runtime order capture application should take upon such situations by specifying the component actions in the package. The available actions are modify, disconnect, and prompt.

**Aggregation:** An aggregation is a collection of offers associated to a product line or a product specification with a default value and cardinality limit. Here's an example. Brand A has 15 phones associated with a product line, of which 8 belong to one product specification and the remaining 7 to another set of product specifications with similar characteristics. For a package type offer, if you choose to provide a discount on all the 15 phones, then instead of selecting the 15 different phone offers, you could create an aggregation depicting the product specifications that the 15 phones belong to. This way all the offers associated to the product specification get the discount. This reduces the effort to create different packages for different offers.

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

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

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

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

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

### Pricing

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

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

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

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

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

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

At the bundle-level price, you can use the component prices to be rolled up to the total, or you can setup the bundle level price. You can alter the prices by using Add alterations option. You can now setup multi-line plans flexible enough to have different pricing strategies for additional lines. You should be able to set this up for package offerings by creating multi-line adjustments which is tiered, or volume discount applied on the input quantity.

Example: 5G Wireless Bundle where cost of a single wireless line is 80\$ per month, for 2 lines 75\$ per month per line, and for 3 lines and more, 70\$ per month per line.

### Terms

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

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

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

The seeded term templates must be created as part of the implementation. For information on creating the charging term or suspension term templates, see *Launch Cloud Service Integration Guide*.

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

### Policy Specification

Configure policy specifications in Launch product offerings for policy-driven charging, which will be used by downstream charging and policy controller applications. You can start by configuring policy specifications using the REST API, and then associate them with the atomic product offering for downstream policy and rule charging function (PCRF) consumption. The policy specification must first be configured in PDC and then loaded into Launch.

**Example:** Policy specification with policy labels such as QOS for the Minutes balance element.

### Rules

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

### Approval History

Using the approval history page you can view the trail of approvals associated to your offer. See [Manage Offer Approvals](#) for creating offer approvals.

## Create a Simple Offer

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

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

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

### General Information

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

### Collateral Information

In this section, you can optionally associate digital content to your offer. Before you associate digital content to your offers, you must add the digital content to your third party content management system. Integrate Launch Cloud Service with the third party content management

system. For more details, see *Launch Cloud Service Integration Guide*. Once integration is done, you should be able to associate collaterals and images from your CMS.

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

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

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

### Marketing Information

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

Here's how you can add a storefront banner:

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

To add a marketing feature:

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

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

### Attributes

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

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

### Pricing

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

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

For more information about configuring pricing, see [Product Offer Pricing](#) and its related sections.

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

### Terms

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

1. Enter the term name and the payment type.

2. Click **Save**.

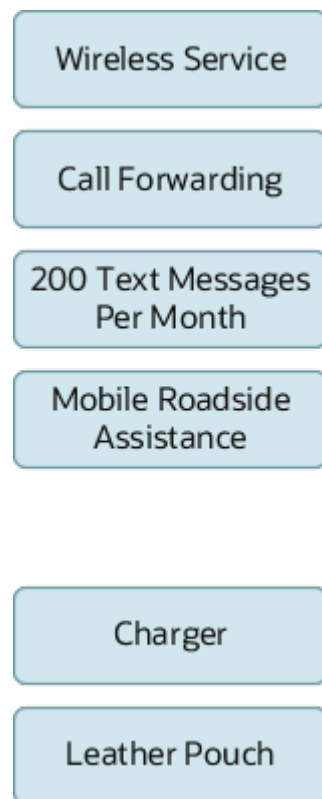
To move to the next page, click **Continue to Rules**.

### Rules

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

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

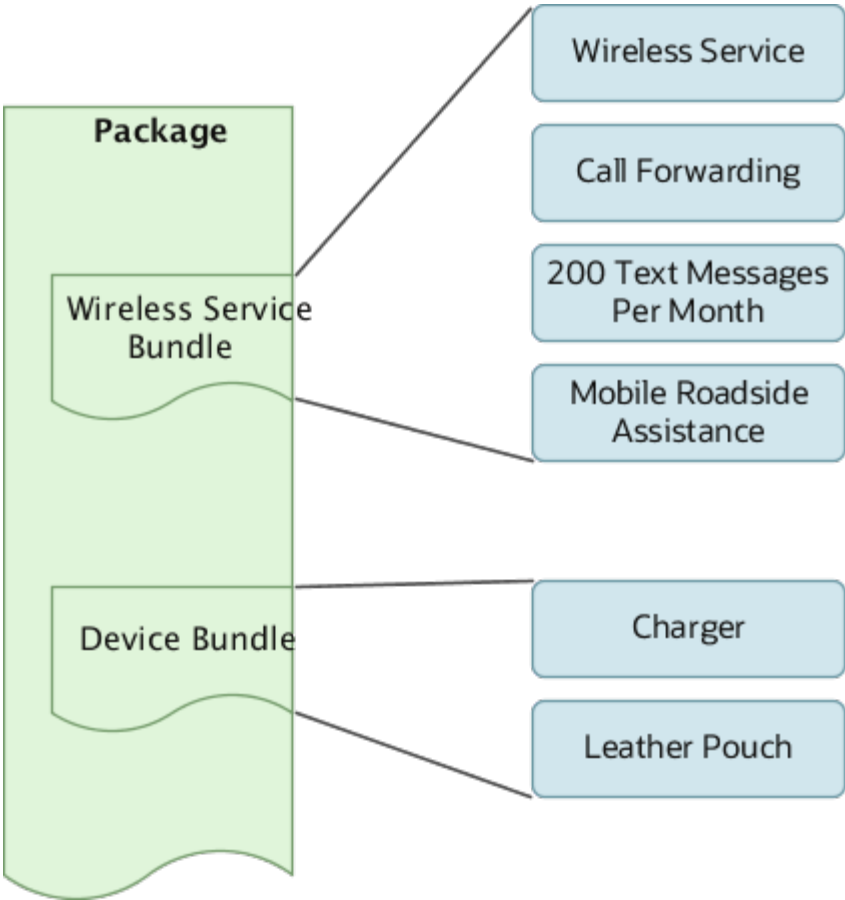
**Figure 8-1 Simple Offer**



## Create a Bundle Offer

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

Figure 8-2 Bundle Offer



To create a bundle offer, use the product offer guided flow where you specify the offer type as a service bundle, package, or commercial bundle.

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

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

Here's an example of a service bundle.

Table 8-1 Example of Service Bundle

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

Table 8-1 (Cont.) Example of Service Bundle

| Offer ID | Offer Type     | Name                               | Associated Product Specification                 | Associated Service Specification                  | Relationship |
|----------|----------------|------------------------------------|--------------------------------------------------|---------------------------------------------------|--------------|
| S2       | Simple service | E-mail                             | Business Broadband E-mail Product Specification  | Business Broadband E-mail Service Specification   | Primary      |
| D1       | Simple service | Router                             | Business Broadband Router Product Specification  | Business Broadband Router Service Specification   | Primary      |
| SB1      | Service bundle | Business Broadband Connect Service | Business Broadband Feature Product Specification | Business Broadband Features Service Specification | Primary      |

Keep in mind that you cannot change the base price of simple product offers from within the bundle offer, as bundle product offers are simply a collection of simple product offers.

### Create an Offer Aggregation

To create an offer aggregation:

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

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

#### Note

Offer aggregation is supported only on new package offering and not on Commercial and Service bundles.

### Create Product Option Groups

To create an option group:

1. On the Components page, click **Add Offerings**.
2. On the Select Available Offers page, search for the offers that you want to add and click **Add**. The Selected Offers now appear in the Clubbed Offers page. You need to select a minimum of 2 product offers to create a product option group.
3. On selecting the offers, the **Create Option Group** option appears.
4. Click **Create Option Group**.
5. On the New Option Group page, provide a name for the option group.
6. Provide a description.

7. From the User Option Selection, either select **Select One** or **Select One or None**.
8. From the Default drop-down list, select a default value for the option group.
9. Click **Create**.

## Manage Offer Approvals

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

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

### Note

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

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

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

### Configure Approvals

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

The following profile options are available to configure approvals:

**Table 8-2 Profile Options for Approval**

| Profile Option               | Description and Values                                                                                                                                                                                                                                                                                                               | Is Mandatory? |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| ORA_ATC_LAUNCH_APPROVAL_TYPE | Defines the approval type for offers. The default is parallel. <ul style="list-style-type: none"><li>• Parallel</li><li>• Sequential</li></ul> <b>Note:</b> If you define the approval type as sequential, you must not override the default approver during offer confirmation. Doing so will change the approval type to parallel. | No            |

**Table 8-2 (Cont.) Profile Options for Approval**

| Profile Option                          | Description and Values                                                                                                                                                                                                  | Is Mandatory? |
|-----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| ORA_ATC_LAUNCH_APPROVAL_VOTE_PERCENTAGE | The percentage range is between 0 and 100.<br><br>Defines the voting percentage required to mark the request as approved during parallel approvals. The default is 100 percent, which means all approvals are required. | No            |

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

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

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

Here are some considerations while working with offer approvals:

- You can't edit an offer that's in the approval stage. Offers in approval stage have an interim status of Approvals Pending. You can see this status when you view an offer that requires an approval.
- Offers that do not require approvals directly move from Design Complete to Ready to Publish status when you confirm the offer design.
- If you change the default approver in a sequential approval process, the type of approval reverts to the default approval type of parallel approval. This is because you would be changing the default resource hierarchy for a resource.
- You can define multiple overriding approvers for an offer but there can be only one default approver.

#### Related Topics

- [Manage Entity Lifecycle Using Initiatives](#)  
Use this topic to understand how you can manage the publishing and the lifecycle status of catalog entities using initiatives.
- [Publish Initiatives to Spoke Systems](#)  
Use this topic to know how you can publish an initiative to the spoke systems.

## Manage Product Offers

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

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

- Search product offers
- Edit product offers
- Confirm product offers
- Revise product offers
- Retire product offers
- Clone product offers
- View references
- Bulk update product offers
- Bulk revise product offers

Additionally, you can do the following:

- Manage audit configurations
- Compare offerings
- Use offer canvas

✓ **Tip**

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

### Search Product Offers

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

### Edit Product Offers

You can edit your product offers based on their lifecycle status.

### Confirm Product Offers

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

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

### Revise Product Offers

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

## Retire and Obsolete Product Offers

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

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

## Clone Product Offers

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

## View References

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

## Manage Audit Configuration

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

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

## Compare Offerings

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

### Note

Comparing prices for bundled offers is not supported.

## Bulk Update Offers

You can perform bulk actions on offerings starting with mass update on the first class properties of Product Offers such as description, effective start date, effective end date, track as asset, search tags, override, and other similar flags, categories, product line, terms, and so on. In addition, you can perform bulk actions on Product offering associations such as adding or removing a Product Line or Category.

You can update atomic offer prices (for simple prices only) using bulk actions on product offerings (either through the bulk update or bulk revise product offerings user experience). You can increase or decrease prices by a fixed amount or by a percentage. This allows you to

efficiently update multiple prices at once. After updating atomic offering prices, use the bulk update capability to update packages and commercial bundles, ensuring they reference the latest versions of the atomic offerings. This will allow the bundle roll-up price to reflect the most recent changes.

**Example:** A Product Manager increases the prices of the SD voice, SD voice supremo, and SD voice allowance atomic offerings by 10%.

There are two flavors of performing bulk update action on product offerings based on their life-cycle status:

- Bulk update product offerings - Update offerings that are part of the same initiative and are in design status.
- Bulk revise product offerings - Update product offerings that are in the Launched status by revising the offerings.

## Offer Canvas

Offer canvas is a graphical visualization of bundles and packages. You can use offer canvas to view and add components to bundles. This improves the design time experience of managing the catalog modeling. You can also view bundle details and perform actions such as editing, revising, and cloning from the canvas page view.

### Note

This option is available only for bundled offers.

# 9

## Product Offer Pricing

### Pricing Overview

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

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

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

### Pricing Structures

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

#### **Price List**

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

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

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

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

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

#### **Simple Pricing Types**

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

Here are some of the simple price types:

- **One-Time Fee:** This is a nonrecurring charge, such as setup or cancellation fees. You purchase a broadband plan and it incurs a one-time setup fee of \$100. When configuring one-time fee, you would now be able to qualify the fee type as purchase, cancel, or any other custom defined type. For custom defined type, modify the lookup `ORA_ATC_ONE_TIME_FEE_TYPE`.
- **Recurring Fee:** These are ongoing charges that aren't generated or affected by usage, such as a monthly subscription fee. You set up this fee to recur automatically based on the frequency of recurrence. For example, a \$10 monthly subscription fee. You should now be able to add recurring fees of type cycle arrear and cycle forward arrear in addition to the existing cycle fees.
- **Usage Fee:** These are charges for the use of a service, such as telephone calls or data usage. Usage fee is measured by the metering rule. You add usage specifications through REST APIs and while creating an offer, associate a usage specification and service specification with the product specification and specify a metering rule. For example, you can set up price of \$50 for 100 GB of data usage.
- **Existing Price Plan:** A price plan specifies how to calculate the cost of a price type configured. It has the price model, price constraints, and rules which determine the actual price. You can reuse any of your existing price plans supporting different price models across simple offers, instead of creating price plans every time you create an offer. Reusing price plans gives you the ability to perform bulk or mass update to prices.

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

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

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

- **Rollovers:** Ability to configure rollover of granted allowance balances. Rollover is a feature that credits unused balances at the end of a billing cycle to the account balance for the next cycle. For example, unused minutes can be rolled over from one month to the next. Rollover balances are different from granted allowance balances, which are only valid between two specific dates.

When defining rollovers, specify the following:

- The balance elements (allowances only) to roll over, e.g., Free Minutes, Gigabytes.
- The type of cycle to which the rollover applies (only Monthly frequency is supported).
- The maximum number of cycles to which a balance element can be rolled over.
- The maximum amount that can be rolled over in a cycle.

- The maximum value for a rollover balance.
- A G/L ID for the rollover charge.

**Example:** A maximum of 150 total minutes from previous months can be rolled over into a new month.

Here are a few examples of different simple pricing schemes:

**Table 9-1 Examples of Pricing Schemes**

| Pricing Scheme                         | Example                                                                                                                     |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| Fixed subscription pricing             | <ul style="list-style-type: none"> <li>• 9 monthly for unlimited subscription</li> <li>• \$15 for 100 GB mailbox</li> </ul> |
| Usage charges for any units of measure | <ul style="list-style-type: none"> <li>• \$1.99 per MB of consumed data</li> </ul>                                          |
| Nonservice based charges               | <ul style="list-style-type: none"> <li>• \$10 purchase fee</li> <li>• \$20 setup fee</li> </ul>                             |
| Physical good pricing with discounts   | <ul style="list-style-type: none"> <li>• 128 GB variant of phone - \$100 with 10% discount</li> </ul>                       |
| Fixed subscription with discounts      | <ul style="list-style-type: none"> <li>• \$50 monthly with \$1 discount</li> </ul>                                          |
| Usage charges with discounts           | <ul style="list-style-type: none"> <li>• \$1.99 per MB of consumed data with \$0.1 discount</li> </ul>                      |
| Termination charges                    | <ul style="list-style-type: none"> <li>• 10% flat fee or balance of contract</li> </ul>                                     |

### Advanced Pricing Types

Here are the advanced pricing types available to you:

- Allowance
- Volume
- Tiered
- Attribute-based pricing
- Attribute-based pricing with zoning (Value Map, Zone Model, and Custom Event Analyzer)

### Allowances

You can configure allowances for a subscription fee. Additionally, you can configure the allowance consumption model to consume the allowances. You should now be able to setup multiple allowance entitlement for a given fee. This is in addition to one allowance that you can create.

Example: For 100\$ Monthly fee, the following allowances needs to be configurable:

- 500 Minutes National Calls towards Mobile (same target Network) 1 Month validity
- 100 Minutes National Calls towards Mobile (different target Network) 10 days validity
- 200 Minutes National Calls towards Fixed Destinations
- 50 Minutes International Calls

Allowance grant validity based on first usage - When a subscriber purchases the offering, the validity period of the allowance is not initialized immediately. Instead, it is initialized when the subscriber first uses the product offering. Previously, allowance validity was always initialized at the time of a specific event, such as the time of purchase.

**Example:** The SD Voice allowance offer grants 100 voice minutes, with the validity period starting on first usage and an end period set to one month from the start date.

Allowance consumption model - You can model the allowance based consumption discount for simple product offering through adjustments as it has been introduced as a new model type.

- Allowance consumption discount helps you apply allowances first. Once these allowances are exhausted, you can then charge customers a fee. Earlier, the allowance consumption model was created only when you configured allowances in the product offering price and enabled the auto-creation option for the allowance consumption model.
- The consumption model would have a usage fee configured where you charge for the usage and then have a discount configured which checks if there is an allowance balance in the subscriber account then use that and credit back the monetary part. If there is no allowance balance, then the customer is debited or charged a fee.
- Example: Monthly recurring subscription fee grants 100 off network minutes allowance valid for 1 month and 50 on network minutes valid for one month through Wireless product offering. Usage fee is configured to use attribute based pricing using value map zoning. Wireless product offering of type discount is used to consume the allowances granted through the Wireless product offering.

### Attribute-Based Pricing

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

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

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

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

**Table 9-2 Example of Combination of Customer Specification Profile and Service Specification Attributes**

| Customer Profile:<br>Customer Type | Product<br>Specification<br>Bandwidth | Price | Allowance | Price Format            |
|------------------------------------|---------------------------------------|-------|-----------|-------------------------|
| Platinum                           | 10 MBPS                               | 100\$ | 20 GB     | Per unit or fixed price |

**Table 9-2 (Cont.) Example of Combination of Customer Specification Profile and Service Specification Attributes**

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

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

**Table 9-3 Example of Combination of Usage Specification Attributes**

| Usage Specification:<br>Call Origin | Usage Specification:<br>Call Destination | Price | Price Format            |
|-------------------------------------|------------------------------------------|-------|-------------------------|
| India                               | US                                       | 1\$   | Per unit or fixed price |
| India                               | ROW                                      | 0.9\$ | Per unit or fixed price |

#### Attribute-based pricing with Allowances

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

**Table 9-4 Example of Combination of Customer Specification Profile and Service Specification**

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

#### Attribute-based pricing with Standard Zone

You can now model usage price plans for simple atomic offerings based on standard zone model with attribute-based pricing.

A standard zone model is based on the origin and destination numbers of a call. It contains rules that associate a pair of origin and destination numbers with a zone impact category. To specify origin and destination numbers, you must include an international access code (the code used to dial out of the country in which the phone number is located). Optionally, you can also include a country code (the code used to dial in to the country in which the phone number is located), an area code, a region code, a city code, a phone number prefix, and so on, up to and including the entire phone number.

The standard zone model needs to be first setup using the new REST API end point with profileType set as STANDARD\_ZONE.

`https://<HOST_NAME>/crmRestApi/atcProductCatalog/11.13.18.05/  
productCatalogReferenceManagement/v1/customProfileSpecification`

The zone impact category needs to be configured in the common business configuration.

Here is a sample standard zone model.

**Table 9-5 Standard Zone Model**

| Origin | Destination | Zone Impact Category |
|--------|-------------|----------------------|
| 0091   | 0091        | IC_LOCAL             |
| 0091   | 975         | IC_BHUTAN            |
| 0091   | 55          | IC_BRAZIL            |

### Attribute-based pricing with Value Maps

You can now model usage price plans of simple atomic offerings based on value map zone model with attribute-based pricing.

A value map is a hierarchical structure that associates zone names with values that apply to a single event attribute, such as an area code, an IP address, or a broadband bit rate. A value map can have multiple nested zones.

You use value maps in attribute-based pricing to group event attribute values into manageable categories. For example, to apply the same charge to all calls made from the San Francisco Bay Area to Los Angeles, you might use a California Area Codes value map that includes the following zones:

- Northern California
  - San Francisco Bay Area
    - \* 408
    - \* 415
    - \* 510
    - \* 650
    - \* 707
- Southern California
  - Los Angeles
    - \* 213
    - \* 323

Instead of creating attribute based rules for all possible combinations of those area codes, you associate the California Area Codes value map with the attribute based pricing and then create only one rule in which San Francisco Bay Area is the origin call value and Los Angeles is the destination call value.

### Attribute-based pricing with custom event analyzer

You can now configure friends and family or closed user group pricing. To do this:

- Setup custom event analyzer rule in both Pricing Design Center (PDC) and Launch for automated distribution to PDC.
  - The REST API endpoint for the custom analyzer rule is:
 

```
https://<HOST_NAME>/crmRestApi/atcProductCatalog/11.13.18.05/  
productCatalogReferenceManagement/v1/customProfileSpecification  
("profileType": "CUSTOM_ANALYZER_RULE")
```
  - Configure the Impact category in the Common Business Configuration to be used in the attribute-based pricing.
- Setup atomic offering with billing service type as special rating.
- Use the attribute-based pricing in Launch with the custom event analyzer rule and setup special rates for each rule.

**Example:** 0.1\$ price for five family numbers. Set up Family rule custom event analyzer and use that in the attribute-based pricing. If Family rule is set as Yes, then set up a special rate for it.

### Price Tags

You can now add the price tag construct on product offering prices of simple offerings. The price tag could be used for many purposes. It can be used to put in an appropriate tag on a product offering price which could be used by downstream systems when performing price overrides or to view them on invoices, or it could be used as a filter condition on adjustments.

The price tag must first be set up using the new REST API endpoint.

```
https://<HOST_NAME>/crmRestApi/atcProductCatalog/11.13.18.05/  
productCatalogReferenceManagement/v1/priceTag
```

The price tag is configured for a service, currency, or non-currency combination. It can take a list of values, any value, or a range.

For example, Wireless Voice atomic offering of type with a 10\$ one-time fee is associated with a price tag CTag1. The CTag1 is configured with a list of values 1\$, 2\$ for price override by the downstream system.

Here are a few examples of advanced pricing:

**Table 9-6 Examples of Advanced Pricing Scheme**

| Pricing Scheme                            | Example                                                                                                                                                  |
|-------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fixed allowance subscription pricing      | <ul style="list-style-type: none"> <li>• \$50 monthly for up to 10 GB mobile data</li> </ul>                                                             |
| Attribute-based pricing                   | <ul style="list-style-type: none"> <li>• You define a 128 GB variant phone to be priced at \$250 and a 256 GB variant to be priced at \$400.</li> </ul>  |
| Fixed allowance with overage              | <ul style="list-style-type: none"> <li>• Overage is charged at a rate of \$1 for every 15-minute increment.</li> </ul>                                   |
| Tiered and volume subscription pricing    | <ul style="list-style-type: none"> <li>• \$29 monthly for up to 10 accounts</li> <li>• \$25 for 10 to 100 accounts</li> <li>• \$23 thereafter</li> </ul> |
| Multi-dimensional attribute-based pricing | <ul style="list-style-type: none"> <li>• 128 GB phone- \$100</li> <li>• 256 GB phone- \$123</li> </ul>                                                   |

**Table 9-6 (Cont.) Examples of Advanced Pricing Scheme**

| Pricing Scheme                                                 | Example                                                                                                                         |
|----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| Tiered usage pricing                                           | <ul style="list-style-type: none"> <li>\$1 for first 10 GB</li> <li>\$1.2 for 10 GB to 20 GB</li> <li>\$2 thereafter</li> </ul> |
| Tiered and volume discounts                                    | <ul style="list-style-type: none"> <li>\$0.10 discount for 1-10 movies</li> <li>\$0.20 discount for 11-20 movies</li> </ul>     |
| Effective date based pricing                                   | <ul style="list-style-type: none"> <li>\$10 for Jan 1st to Mar 31st</li> <li>\$11 from April 1st onward</li> </ul>              |
| Attribute-based pricing with standard zone model or value maps | <ul style="list-style-type: none"> <li>On-net calls at 0.1\$, Off-net calls at 0.2\$</li> </ul>                                 |

**Note**

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

**Counters**

You can configure counters for atomic offers. Counters are often used as accumulators of usage or charges in atomic offers. You can track usage or spending by using counters. Counters can also be used in discount triggers. Configure the Balance Elements that are of counter type before using them in the pricing model. They are available in prices and alterations of atomic offers.

Counters can also be used in discount triggers. Configure the Balance Elements that are of counter type before using them in the pricing model. Counters are available in prices and alterations of atomic offers.

Counter validity based on first usage: When a subscriber purchases the offering, the validity period of the counter is not initialized immediately. Instead, it is initialized when the subscriber first uses the product offering. Previously, counter validity was always initialized based on a specific event, such as the time of purchase.

**Example:** The Wireless Data Offer grants 10 GB of data. The counter is set up with first usage validity, and the end period is set to one month from the start date.

**Price Plans with Commitment Period**

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

The next step is to create a commitment term. A commitment term is a condition in which the product offer is sold to a customer. For example, you can set a two-year commitment period for a product offer. This effectively means that when you sell this offer, the customer has committed to this offer for a period of two years. The commitment may or may not be absolute.

You can also provide early termination options for an easier exit route for the customer. Alternatively, you can set up a penalty for early termination with the following options:

- None
- Flat: A flat fee, such as 100 US dollars or 75 euros.
- Fixed Proration: A flat termination fee for a contract duration with proration percentage penalty for each remaining month in the contract. The system calculates and evenly spreads the penalty percentage across the contract duration.
- Variable Proration: A flat termination fee with different proration percentages for different periods of time within the contract duration.
- Balance of Contract: The balance remaining in the customer's contract.

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

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

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

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

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

**Table 9-7 Price Plans for Atomic Service Offer Type**

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

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

**Table 9-8 Price Plans for Atomic Service Offer Type with and without Commitment Term**

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

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

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

Offer A:

**Table 9-9 Price Plans for Offer A**

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

Offer B:

**Table 9-10 Price Plans for Offer B**

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

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

**Table 9-11 Price Plan for Bundle AB (6 Months Commitment Term)**

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

Bundle AB (12 month commitment term):

**Table 9-12 Price Plan for Bundle AB (12 Month Commitment Term)**

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

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

**Table 9-13 Alteration Cases in Bundle AB**

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

### Alter Prices

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

Here are the different ways you can alter price:

- **Discount amount and percent:** You can apply a discount to price. The discount can be an absolute or a percent of the original price. For example, if the original price was \$100, and you applied a discount of \$10, then the adjusted price would be \$90. Similarly at the 5% discount, the adjusted price would be \$95.
- **Markup amount and percent:** You can inflate the price by an absolute amount or percentage value. For example, if the original price was \$100, and you applied a markup of \$10, then the adjusted price would be \$110. Similarly, if you applied a markup percent of 5%, the adjusted price would be \$105.
- **Price override:** You can override the price by an absolute value. This amount becomes the adjusted price. This is applicable only for bundle product offer. You can also use price override on the components of a bundled or simple product offering.

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

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

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

### Device Programs

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

### Lease

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

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

### Installments

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

You can set an installment agreement against a one-time purchase fee. You can also configure any advanced pricing, such as attribute-based pricing, that may be required for down payment or monthly installments. The attribute-based selector in the attribute-based pricing section enables you to define different installment plans based on tenure, for the various entities that you choose to configure.

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

## Real-Time Pricing Scenarios and Setup

Here are a few pricing scenarios elaborated with setups.

### Simple product offering with volume discount

Set up a home sensor and camera system with one-time fee and volume discount. The more home sensors you purchase, the greater the volume discount you receive on your one-time fee.

**Table 9-14 Simple Product Offering with Volume Discount**

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

**Simple product offering with tiered pricing**

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

**Table 9-15 Simple Product Offering with Tiered Pricing**

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

**Product offering allowances**

Set up a 10 GB data pack.

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

**Product offer with effective dates**

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

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

**Table 9-16 Product offer with effective dates (April-June)**

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

Effective Period: July 01, 2020 to unlimited

**Table 9-17 Product offer with effective date (July-Unlimited)**

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

### Tiered pricing with effective dates

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

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

**Table 9-18 Tiered pricing with effective dates (April-June)**

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

Effective Period: July 01, 2020 to unlimited

**Table 9-19 Tiered pricing with effective dates (July-Unlimited)**

| Tier | Minimum Quantity | Maximum Quantity | Price  |
|------|------------------|------------------|--------|
| 1    | 0.00             | 5.00             | \$2.00 |
| 2    | 5.00             | 10.00            | \$1.50 |
| 3    | 10.00            | Unlimited        | \$1.10 |

## Set Up Simple Prices

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

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

### Set Up One-Time Fee

Here's how you set up one-time fee:

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

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

**Table 9-20 Example of One-time Entry Fee**

| Name              | Price |
|-------------------|-------|
| Initial Setup Fee | 10    |

**Set Up Recurring Fee**

Here's how you set up recurring fee:

1. Click **Add Price** and select **Recurring Fee** from the drop-down list.
2. On the New Recurring Fee page, enter your fee name and ID.
3. In the Price Information section, select a price list, select the period, and the recurring price.
4. In the Financial Information section, select the general ledger ID, tax code, and specify whether tax is included.
5. In the Price Alterations section, click **Add Price Alterations** if you choose to apply price alterations. You can reuse the existing price alterations on atomic offers to avoid price proliferation.
6. Click **Save**.

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

**Table 9-21 Example of Recurring Monthly Fee**

| Name                     | Price | Period |
|--------------------------|-------|--------|
| Monthly Subscription Fee | 10    | Month  |

**Set Up Usage Fee**

Here's how you set up usage fee:

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

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

**Table 9-22 Example of Usage Fee based on Specific Plan**

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

### Existing Price Plans

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

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

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

## Set Up Advanced Prices

These are the different advanced prices you can set up:

- Allowance
- Volume
- Tiered
- Attribute-Based Pricing

### Set Up Allowance Prices

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

You can create and manage your balance element using REST APIs. See *REST API Reference for Launch Cloud Service*.

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

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

**Note**

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

4. Specify the start and end dates, allowance quantity, period quantity, period units, and click the tick icon.
5. You can add multiple allowances.
6. Click **Save**.

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

**Set Up Volume Prices**

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

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

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

**Set Up Tiered Prices**

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

1. From the Advanced Pricing Model drop-down list, select **Tiered**.
2. In the Tiered Pricing Ranges section, specify the start and end dates, name, minimum and maximum quantity, price, price format, and click the tick icon.

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

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

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

**Set Up Attribute-Based Pricing**

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

1. From the Advanced Pricing Model drop-down list, select Attribute-Based.
  - a. In the Attribute-Based Pricing section, enter a pricing model name, description, and select the entity specifications, for example, Product Specification, Usage Specification, Service Specification, or Customer Profile Specification.
  - b. Select the zone model or value map optionally for usage-based pricing.
  - c. Specify the allowance details and the start and the end date.
2. Enable the **Share Allowance** option, if you choose to share the allowance, and specify the allowance type. You will be asked to specify the allowance quantity, allowance duration,

and period units when you add the attribute based price for all the variants you include for pricing.

3. To apply overage, enable the **Apply Overage** option and specify the overage price format. You will be asked to specify the overage price when you add the attribute based price for all the variants you include for pricing.
4. Click **Add Attribute-Based Price**.
  - Select the variant attribute for which you are specifying the price from either the SKU Template drop-down list or any other attribute that makes a variant with a different price. This would be a combination of characteristics that uniquely identifies the variant for which you want to set the price.
  - Specify the attribute details of the variant, such as brand, price tag, price format, and price.
  - If you enabled share allowance, then specify the allowance quantity, allowance duration, and period units.
  - If you enabled overage, then specify the overage price.
  - Click **Add**.

To add attribute based prices for more variants repeat this step.

5. Click **Save**.

## Set Up Price Alterations

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

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

### Set Up Price Alterations for atomic offers

The following discount and markup options are available:

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

- **Allowance grant model:** Configure allowance grants through the adjustment model grant allowance in simple offering of product type discount and time-based discount. Example: Grant 100 free minutes via recurring adjustments in wireless discount product offering.
- **Allowance consumption model:** Allowance consumption discount help you consume the allowances first, and once exhausted, lets you charge customers a fee for it. In earlier releases only when you configure allowances in the product offering price and enable auto creation model of allowance consumption model, it was being created. The consumption model would have a usage fee configured where you charge for the usage and then have a discount configured which checks if there is an allowance balance in the subscriber account then use that and credit back the monetary part. If there is no allowance balance, then the customer is debited or charged a fee.

Example: Monthly recurring subscription fee grants 100 off network minutes allowance valid for 1 month and 50 on network minutes valid for one month through Wireless product offering. Usage fee is configured to use attribute-based pricing using value map zoning. Wireless product offering of type discount is used to consume the allowances granted through the Wireless product offering.

### Set Up Discount Trigger Conditions for Alterations

You can now limit when adjustments are applied based on trigger conditions. These conditions will determine as to when a discount needs to apply.

A trigger condition consists of the following items:

- **Name or expression:** Name or expression of the characteristic you want to compare.
- **Operator:** Specifies how the result of the name is compare with a value. Valid operators include greater than, greater than or equal to, less than, less than or equal to, equal to, and not equal to, in the list.
- **Value:** Specifies the value to compare with the result of the expression.

Sample trigger condition characteristics:

- **TotalCharge:** Specifies the total charge of an event.
- **TotalQuantity:** Specifies the total quantity in an event, such as the number of minutes talked or megabytes downloaded.
- **BalanceOfResource[ALLOWANCE\_NAME]:** Balance of the allowance resource function used to check the available entitlement for allowance consumption.
- **Price Tag -** Specifies the tag to be used as a condition for an adjustment.
- **Price Plan name**
- **Currency**

A trigger filter condition can include multiple conditions, all conditions must be met for the discount to be applied.

Example: 50% off if the monthly charge is greater than 500\$. You could configure the following adjustment trigger condition:

- **Name:** TotalCharge (the total charge of the event)
- **Operator:** Is greater than
- **Value:** 500

Price Tags - You can set up price tags on the alterations for run-time price override.

### Set Up Discount Priority and Discount Mode

The following modeling enhancements have been introduced for Digital Business Experience (DBE):

- Discount priority for product offer type discount and time-based discount. The discount priority determines the sequence in which the charging engine evaluates discounts when multiple discounts are applicable. A higher number indicates a higher priority.
- Discount mode: This specifies the method by which the charging system should apply a discount. The available options are sequential or parallel. A sequential discount implies that the discount offer is applied to the remaining charge amount after previous discounts have been deducted. Conversely, a parallel discount is applied to the original charge amount, irrespective of any reductions from prior discount offers.
- Ability to publish these definitions to Pricing Design Center (PDC).
- Example:
  - Discount 1 with priority 1, and discount mode as sequential
  - Discount 2 with priority 2, and discount mode as parallel

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

To specify either a fixed or percentage discount:

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

To specify a volume or a tiered discount:

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

- f. Click **Add**.

To specify either a fixed markup or a percentage markup:

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

To specify an attribute based alteration:

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

### Set Up Price Alterations for Bundle Offers

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

The following discount and markup options are available:

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

- **Percentage discount:** An amount equivalent to the percentage is deducted from the base price.
- **Fixed markup amount:** A fixed amount is added to the base price.
- **Percentage markup amount:** An amount equivalent to the percentage is added to the base price.

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

Consider the following when you perform a price alteration:

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

**Note**

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

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

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

**Note**

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

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

## Set Up Price Plans with Commitment Period

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

You begin by creating a price plan for your offer.

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

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

 **Note**

Step [1](#) and [2](#) apply to atomic offers. Steps [1](#) to [6](#) apply to bundle offers.

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

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

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

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

The modified term price now appears for the price list.

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

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

The modified term price now appears for the price list.

## Set Up Lease Plan

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

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

### Note

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

3. Specify the grace period duration and units of the duration.
4. In the **Attribute based lease information** section, each row represents the lease information for each variant of the device. Edit each variant and provide the lease deferred amount, down payment, and payment for each period.
5. In the **End of lease terms** section:
  - a. Specify the terms of returning the device.
  - b. Specify the terms of continuing to lease the device.
  - c. Specify the price of buying out the device at the end of the lease term.
6. If you want to allow upgrades, enable the **Allow Upgrade** option and specify the threshold conditions for an upgrade to be applicable:
  - a. How the minimum threshold for upgrade must be measured.
  - b. Minimum threshold for upgrade.
7. In the **Return checklist** section, click **Add Return Checklist** to select and attach your installment agreement.
8. In the **Lease agreement** section, click **Add Lease Agreement** to select and attach your installment agreement.
9. To add more lease terms, click **Add Term**. This option is not available for devices with variants.
10. Click **Update**.

## Set Up Installment Plan

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

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

1. On the Installment Plans page, you specify the details including the tenure as a duration or a range having a minimum and maximum value, the frequency of payment, and so on depending on your business requirement.
2. If you have specified that the installment plan is eligible for upgrade, then specify:
  - a. How the minimum threshold for upgrade must be measured.
  - b. Minimum threshold for upgrade.
3. Attach your installment agreement and specify the name of the duration, number of installments, and select the tick icon.
4. Save the details.

**Note**

If you want to add additional qualifiers, you can do so using REST APIs for customer profile specification. Qualifiers are created as characteristics of a customer profile specification. See *REST API Reference for Launch Cloud Service*.

# Promotions

## Promotions Overview

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

### What's a Promotion

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

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

### Types of Promotions

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

- **Award:** Usually a gift or an allowance. For example, a USB disk or 100GB is given to the customer for free.
- **Discount:** Usually a discount on the price of the offering. For example, for every 10 quantities of a product offering that a customer buys, the customer gets 10% off on qualifying products. Another example is, if a customer buys 2 shirts, the customer gets 100 rupees off on each shirt.

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

### Mutually exclusive discount via promotion

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

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

- Event 1 – Supremo Prime Plan + Device get 20% off on the device.
- Event 2 - Supremo Prime only for locations in 101 and 103 get 10% off on Prime.

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

### Aggregate discount via promotions

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

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

#### How are criteria parameters obtained?

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

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

## Events and Benefits

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

### Events

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

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

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

- **Sequence Number** - Specifies the order of the sequence evaluation and can only be specified using the Launch REST API. In the user interface, you can drag and position the sequence definitions in the required order.
- **Name** - Name of the promotion sequence.
- **Next promotion Event if used** - Specify the next promotion event to apply if the current promotion event is applied.
- **Next promotion Event if not used** - Specify the next promotion event to apply if the current promotion event is not applied.

You can add a conditional sequence of events to achieve aggregate discounts and mutually exclusive discounts. For example, consider that you have 3 offers that include an internet plan, a mobile plan, and a device. You can create two events, event1 has mobile and internet subscription with a discount of 20% and event2 has internet plan subscription and if the subscriber is from a particular location, then the discount is 10%. At runtime, event1 is analyzed and if the customer subscribed to the internet and mobile subscription, then a 20%

discount is applied and the sequence exits. Else, it moves to next promotion event<sup>2</sup>. If the customer has internet subscription and is from the specified location, then a 10% discount applies else the sequence exits without applying any discounts.

### Criterion and Criteria Group

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

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

### Benefits

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

**Table 10-1 Promotion Type and Benefits**

| Promotion Type                 | Criteria                                                                                                                                                  | Benefit Type                                                                                      | Example                                                                                                                                                                               |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Award (External Benefit)       | Customer reaches a certain criteria, for example, either by spending a certain specified amount or by buying a certain quantity of a product or products. | Award, Allowance<br>Example: Buy N items or more and get n items for free on qualifying products. | <ul style="list-style-type: none"> <li>Award: A physical gift, such as a mobile.</li> <li>Allowance: Additional GB or MB.</li> </ul>                                                  |
| Discount (Percentage Discount) | Customer reaches a certain criteria, for example, either by spending a certain specified amount or by buying a certain quantity of a product or products. | Discount<br>Example: Buy n items or more, and get up to 25% off on qualifying products.           | Discount <ul style="list-style-type: none"> <li>Buy 200\$ or more, and 5% off on purchase of qualifying products.</li> <li>For every 5 pairs of socks purchased, save 20%.</li> </ul> |

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

### Promotions and Price List

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

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

**Table 10-2 Price List and Promotions**

| Price List    | Promotions                                                                                                                                          |
|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| US Price List | <ul style="list-style-type: none"> <li>Buy 100\$ and get 5% off on the qualifying product.</li> <li>Buy 3 handsets and get 10% discount.</li> </ul> |

**Cross-Product Discounts**

Define and manage cross-product discounts.

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

Promotions continue to work as the standard TMF 671.

## Device Trade In

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

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

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

- Initiative to which the trade-in program is associated.
- Duration for which these programs are effective.
- Device specification, which could be an IMEI number or any other specification based on the response questionnaire of the trade-in device.
- Redemption or benefit type where you can specify multiple values such as gift, discount, and so on.
- Whether the offer is eligible for maximum, minimum, or percentage trade-in value depending on the condition of the trade-in device.

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

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

**Determine the Trade-In Value**

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

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

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

- Define one or more sets of device qualification questions with each set containing a series of questions for device trade-ins.
- Use the two response options to configure interrelated questions in several ways. For example, if the device does not turn on at all, then you do not need to consider all other questions related to whether the device is working properly to estimate the trade-in value.
- Each response in a qualifier question would have a relative value of the trade-in price of the old device as percentage reduction, minimum value, or maximum value depending on the response.
- Provide a description for each choice a user would make.

## Create a Promotion

Here's how you can create a promotion.

1. Click on **Promotions**, and then click **Create Promotion**. The **New Promotion** page appears.
2. On the **New Promotions** page, provide the identifying information such as name and description.
3. Specify the effective period during which the promotion is valid.
4. In the **Other information** section, specify the following:
  - Initiative the promotion is associated with
  - Promotion Type
  - Price List
  - Promotion profile specification
5. Click **Continue to Events** to enter the name, priority, and the description of the event.

### Note

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

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

### Note

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

8. Add the criteria group name.
9. Specify the parameter AND or OR, to say whether any of the criteria or all the criteria must be met.

10. Select the criteria parameter, the operator, and the criteria value depending on the criteria parameter that you have selected.
11. In the Benefits section, click **Add Promotion Benefit**.
12. Specify the details including the action type, value, and object.
13. Click **Add Event**.
14. Click **Add Promotion Event** if you want to add another promotion event.
15. Click **Create**.

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

# Agreements and Entitlements

## Agreements and Entitlements

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

Common types of agreements are sales and service agreements.

- A *sales agreement* is a contract that includes special pricing and other benefits when a customer purchases applicable products. For example, an enterprise customer of the CSP negotiates a sales agreement that discounts volume purchases.
- A *service agreement* is a service contract. For example, a customer purchases a business-grade internet service from the CSP. The CSP might negotiate a service agreement with the customer providing a special discounted rate to repair faults at customer premises over a predetermined period.

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

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

An entitlement template includes the following:

- **Benefit:** A benefit is the entitlement pricing information maintained as price alterations.
- **Condition:** A condition denotes criteria that determine a customer's entitlement to the benefit.
- **Metric:** A metric denotes the performance requirement of an entitlement template and is usually associated with a service-level agreement (SLA) within a sales or service agreement. SLAs often indicate the expected response and resolution times for a service request based on the request priority.

# 12

## Catalogs and Categories

### Create Catalogs and Categories

Use this topic to create catalogs and categories.

To create a catalog:

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

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

To create a category:

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

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

You can also add subcategories within a category. To create a sub category:

1. On the New Category page, Sub Categories section, click **Add Sub Category**.
2. Enter a sub category name, description, and click the tick icon.  
The sub category is now listed under the sub categories section.
3. Click **Add**.

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

# 13

## Rules

### Rules Overview

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

#### What's a rule

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

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

#### How do I create rules

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

Considerations when creating rules:

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

#### Types of Rules

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

- Eligibility rules: Defines the eligibility criteria of a user to buy a product offer or service. For more information, see [Eligibility Rules](#).
- Compatibility rules: Specifies the inclusion or exclusion of a combination of products in an offer. For more information, see [Compatibility Rules](#).
- Recommendation rules: Provides cross-sell and up-sell opportunities for offers. For more information, see [Recommendation Rules](#).
- Upgrade and downgrade migration rules: Defines the permissible offers that the customers can migrate to or migrate from along with the terms. For more information, see [Migration Rules](#).
- Constraint rules: Defines the relationship between any two items in a product offering. For more information, see [Constraint Rules](#).

## Constraint Rules

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

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

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

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

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

### Select a constraint rule template

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

**Table 13-1 Constraint Rules Template**

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

### Model the rule using constraint rule Graphical builder

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

A constraint may have the following:

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

If your configuration spans multiple nodes within the construct builder, you can refer to the textual construct of the configuration that appears simultaneously in the UI.

## Eligibility Rules

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

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

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

For more information on using REST APIs to create catalog entities, see [Use REST APIs to Create Catalog Entities](#).

### Create Eligibility Rule

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

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

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

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

**Table 13-2 Example of Eligibility Rule**

| Parameter | Operator | Value         |
|-----------|----------|---------------|
| Country   | Equals   | United States |

### Related Topics

- [Product Offer Guided Flow](#)  
Use this topic to understand how you can use the guided flow in the Launch application to create product offers. The following are the high-level steps in the guided flow that you may use for creating an offer:
- [Use REST APIs to Create Catalog Entities](#)

# Compatibility Rules

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

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

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

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

## Create Compatibility Rule

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

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

### Note

The **COMPATIBLE** operator provides design flexibility at runtime. For example:

- You can allow device modeling outside the package.
- You can reduce dependency on offer aggregation constructs.
- You can create a storefront experience of selecting a package and listing all compatible offers and product lines or selecting a device and listing the compatible packages.

## Related Topics

- [Product Offer Guided Flow](#)

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

# Recommendation Rules

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

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

### Create Recommendation Rules

Here are the quick steps to creating a recommendation rule:

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

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

**Table 13-3 Example of Recommendation Rule**

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

### Related Topics

- [Product Offer Guided Flow](#)  
Use this topic to understand how you can use the guided flow in the Launch application to create product offers. The following are the high-level steps in the guided flow that you may use for creating an offer:
- Use REST APIs to Create Catalog Entities

## Migration Rules

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

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

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

**Note**

- The migration rule is applicable between sellable bundles (commercial, service, or package).
- When publishing the Initiative to Siebel spoke system, it will only support the Product Offering of type Package.

**Create Upgrade or Downgrade Rule**

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

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

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

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

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

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

**Table 13-4 Example of Rule Upgradation**

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

**Related Topics**

- [Product Offer Guided Flow](#)  
Use this topic to understand how you can use the guided flow in the Launch application to create product offers. The following are the high-level steps in the guided flow that you may use for creating an offer:
- Use REST APIs to Create Catalog Entities

# Product Lines

## Product Lines Overview

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

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

## Create Product Lines

Here's how you can create product lines.

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

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

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

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

# Entity Lifecycle Management

## Manage Entity Lifecycle Using Initiatives

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

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

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

### Scenario 1 – Release a new product offer in the market

#### Test Instance

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

#### Production Instance

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

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

#### Test Instance

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

4. **Active:** You can use migration job to migrate entities from test to production.

#### Production Instance

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

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

#### Note

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

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

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

#### Lifecycle Stage and User Actions

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

**Table 15-1 List of User Actions on Product Offers**

| Actions | Status                                                                                                                                                                      | Description                                                                                                             |
|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| View    | <ul style="list-style-type: none"> <li>In design</li> <li>Ready to publish</li> <li>In test</li> <li>Launched</li> <li>Active</li> <li>Retired</li> <li>Rejected</li> </ul> | You can view the offer details in a read-only mode. This serves as a snapshot of the catalog entity.                    |
| Edit    | <ul style="list-style-type: none"> <li>In design</li> </ul>                                                                                                                 | You can open the catalog entity in an edit mode. This takes you through the guided UI flow.                             |
| Confirm | <ul style="list-style-type: none"> <li>In design</li> <li>In test</li> </ul>                                                                                                | You can confirm your product catalog entity to move it to the <b>Ready to test</b> or <b>Ready to publish</b> statuses. |

Table 15-1 (Cont.) List of User Actions on Product Offers

| Actions  | Status                                                                                                                                                                      | Description                                                                                         |
|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| Clone    | <ul style="list-style-type: none"> <li>In design</li> <li>Ready to publish</li> <li>In test</li> <li>Launched</li> <li>Active</li> <li>Retired</li> <li>Rejected</li> </ul> | Opens the Clone catalog entity dialog box. Eventually takes you to the guided UI flow.              |
| Revise   | <ul style="list-style-type: none"> <li>Launched</li> </ul>                                                                                                                  | You can create a revision of the launched catalog entity.                                           |
| Retire   | <ul style="list-style-type: none"> <li>Launched</li> </ul>                                                                                                                  | You can associate your product catalog entity with an initiative and the initiative can be retired. |
| Obsolete | <ul style="list-style-type: none"> <li>Retired</li> </ul>                                                                                                                   | You can obsolete a product catalog entity after it has been retired.                                |
| Publish  | <ul style="list-style-type: none"> <li>Ready to publish</li> </ul>                                                                                                          | You can publish your product catalog entity to a spoke system for testing.                          |

**Related Topics**

- [Initiatives Overview](#)  
Use this topic to understand what initiatives are and how you create and manage them.
- [Product Offer Guided Flow](#)  
Use this topic to understand how you can use the guided flow in the Launch application to create product offers. The following are the high-level steps in the guided flow that you may use for creating an offer:

## Configure a New Lifecycle Status

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

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

**Create a Lifecycle Status**

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

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

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

A sequence number gets allocated to the status.

6. In the Other Information section, define the next User Action.
7. From the Error State drop-down list, select an error state for the status.
8. Enable the following options as required:
  - a. Edit Initiative: Specify if the initiative can be edited.
  - b. Edit Initiative Entities: Specify if the initiative entities can be edited.
  - c. Requires Approval: Specify if the initiative requires approval.
  - d. Allow References in Other Initiatives: Specify if the initiative can be referred to in other initiatives.
  - e. Enable Publish: Specify if the initiative can be published.
9. Enter the destination.
10. Click **Add Destination**.
11. Click **Create**.

Your new version is now active.

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

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

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

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

- Edit initiative: Specify if you can edit initiative entities.
- Edit initiative entities: Specify if you can add or remove the initiative entities.
- Requires Approval: Specify whether approval is required for a lifecycle transition.
- Enable Publish: Specify if the status can be published to spoke systems.
- Allow References in Other Initiatives: Specify if the catalog entity reference can be made in another initiative.

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

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## Job Management

### Import Catalog Entities

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

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

#### **Note**

When you set up the Launch application, your administrator must increase the number of import threads using the EGP\_ITEM\_IMPORT\_NUMBER\_OF\_THREADS profile option. See [Item Profile Options](#).

Here's how you configure catalog import:

1. Prepare the import data file.  
For more information on preparing the import file, see Import Catalog Definitions in *Launch Cloud Service Implementation Guide*.
2. Click the **Administration** tab, and then click **Manage** on the **Job management** card.
3. On the **Job Management** page, click **Import jobs**.
4. On the **Import Jobs** page, click **Create Import Job**.
5. On the **New Import Job** page, click **Select a File** and select the JSON file that you have prepared.
6. Click **Import**.

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

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

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

### Export Catalog Entities

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

You can perform only initiative-based and entity-based exports.

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

1. Click on **Administration** tab, and then click **Initiatives**.
2. On the **Initiatives** page, select the initiative that needs to be exported and from the **Actions** drop-down list, click **View**.
3. On the initiatives page that you just selected, click **Export**. The export job gets triggered and the job ID is notified to you.

Here's how you can track the export job:

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

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

#### **Note**

You cannot export initiatives or resources that are in **In design** status.

#### **Related Topics**

- [Manage Entity Lifecycle Using Initiatives](#)  
Use this topic to understand how you can manage the publishing and the lifecycle status of catalog entities using initiatives.

## Migrate Catalog Entities

Use this topic to know how to migrate catalog entities from across Launch applications. You can now automatically move the catalog definitions from one Launch instance to another. You can now go into the target Launch system to move the catalog definitions from the source system automatically by using the create migration job utility. You can move the contents of an initiative as a whole, either by itself or along with its referenced entities, or move specific individual entities, such as a product offering, product line, and so on, across instances.

Example: There are two environments of Launch - Environment 1 and Environment 2. In Environment 1, the Summer initiative has been created with catalog definitions. An administrator can now log in to Environment 2 to initiate the migration of the Summer initiative's catalog definitions from the source Environment 1 by navigating to the Migration Jobs card under the Job Management card.

You can now integrate your Launch application with Siebel CRM to migrate Siebel CRM catalog definitions into Launch Experience. Some of the definitions include, but are not limited to, product specifications (product class), price lists, catalogs and categories, and eligibility and compatibility rules.

Here's how you configure catalog migration:

1. Click the **Administration** tab, and then click **Job management**. The **Job Management** page appears.

2. On the **Job Management** page, click **Migration jobs** card.
3. On the **Migrations Jobs** page, click **Create Migration Job**.
4. Choose the **Source** as either Siebel or Launch.
5. Provide the details and click **Submit**.

## Bulk Update Jobs

Use this topic to know how to manage the jobs created for the bulk update of product offerings.

Here's how you manage bulk update jobs:

1. Click the **Administration** tab, and then click **Job management** card. The **Job Management** page appears.
2. Click the **Bulk update jobs** card.
3. On the **Bulk update jobs** page, click the job id.
4. Check if the job status is success or failure. Check the details section for more information.

## Publish Jobs

Use this topic to know how to manage the publish jobs created by the publish action of the initiative.

Here's how you manage the publish jobs:

1. Click the **Administration** tab, and then click **Job management**. The **Job Management** page appears.
2. Click the **Publish jobs** card.
3. On the **Publish Jobs** page, click the job id.
4. Check if the job status is success or failure. Check the details section for more information.

# Configure the Business Configurations

You can now centrally configure and manage business configurations across your enterprise. Here are some of the business configuration parameters that you can set up:

- Customer type
- Pricelist type
- Channels
- Market segments
- Geographical hierarchy, including country, province, state, city, and postal code for various geography types
- Eligibility rule entities for parameters, operators, and values
- Country
- Account type
- Credit Score
- Promotion Criteria Parameter
- Impact Category

Here's how you manage business configurations:

1. Click the **Administration** tab, and then click **Business configurations**.
2. Check the details section for more information.

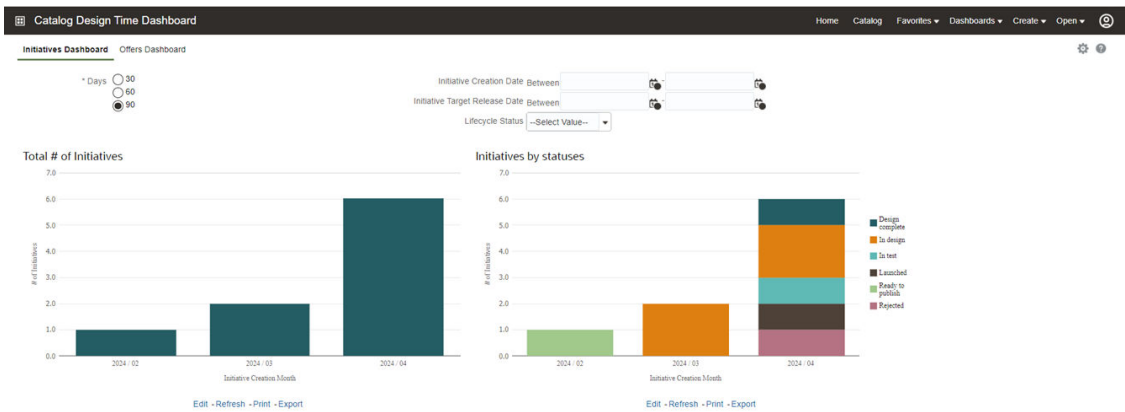
# 18

## Reports

You can now gain real-time insights into the transactional aspects of catalog management. Built using the Oracle Transactional Business Intelligence (OTBI), the Dashboards for Initiatives and Product Offers provide summary and detailed reporting capabilities in these two areas.

[Figure 18-1](#) shows the Initiatives Dashboard OTBI page that depicts the total number of Initiatives for 30, 60, 90, or custom date range with additional filters on the lifecycle status or the target release date.

**Figure 18-1 Initiative Dashboard**



[Figure 18-2](#) shows the Offers Dashboard OTBI page that depicts the total number of Offers for 30, 60, 90, or custom date range with additional filters on the lifecycle status, types, and offer last updated dates.

**Figure 18-2 Offers Dashboard**

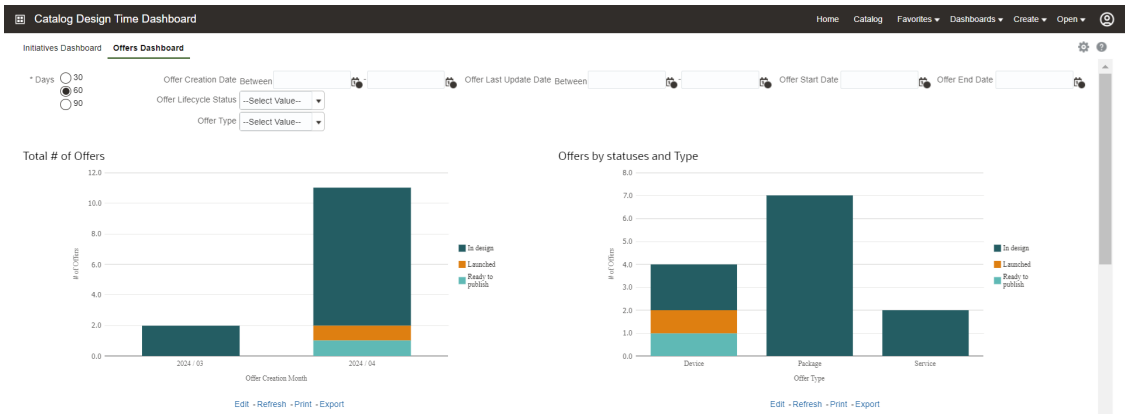


Figure 18-3 shows the Offers Dashboard OTBI page that depicts the Offer usage, Offers that are to be released to the market, and the ones reaching end of life.

Figure 18-3 Offer Usage Dashboard

