

Oracle® Advanced Pricing

User's Guide

Release 11*i*

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Oracle welcomes your comments and suggestions on the quality and usefulness of this publication. Your input is an important part of the information used for revision.

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- Do you need more information? If so, where?
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- Electronic mail: appsdoc_us@oracle.com
- FAX: 650-506-7200 Attn: Oracle Advanced Pricing Documentation Manager
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Redwood Shores, CA 94065
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Preface

Intended Audience

Welcome to Release 11i of the *Oracle Advanced Pricing User's Guide*.

This guide assumes users have a working knowledge of the following:

- Principles and customary practices of the business area.
- Oracle Advanced Pricing

Oracle suggests that users who have never used Oracle Advanced Pricing attend one or more of the Oracle Applications training classes available through Oracle University.

- Oracle Self Service Web Applications

To learn more about Oracle Self Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- Oracle Applications graphical user interface

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This guide contains the information you need to understand and use Oracle Advanced Pricing.

Chapter 1	Introduces Oracle Advanced Pricing concepts and provides an overview of functionality.
Chapter 2	Introduces qualifiers, qualifier groups, and associated qualifier functionality.
Chapter 3	Introduces modifiers, pricing organizer, pricing limits, and associated modifier functionality.
Chapter 4	Introduces formulas and associated formula functionality.
Chapter 5	Explains price lists and associated price list usage and functionality.
Chapter 6	Explains archiving and purging pricing entities such as price list and modifier lines.
Chapter 7	Explains multi-currency conversion lists and how to use them with price lists and agreements.
Chapter 8	Introduces agreements and associated agreement functionality.
Chapter 9	Introduces the Pricing Engine Request Viewer and associated functionality.
Chapter 10	Listing and definition of reports and concurrent programs.
Appendix A	Provides usage scenarios for formulas.
Appendix B	Provides usage scenarios for modifiers.
Appendix C	Provides a listing of navigation paths.

Other Information Sources

You can choose from many sources of information, including documentation, training, and support services, to increase your knowledge and understanding of Oracle Advanced Pricing.

When this manual refers to other Oracle Applications documentation, use only the Release 11i versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF Documentation:** See the Online Documentation CD for current PDF documentation for your product with each release. This Documentation CD is also available on *OracleMetaLink* and is updated frequently.
- **Online Help:** You can refer to Oracle Applications Help for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.

- **Release Content Document:** See the Release Content Document for descriptions of new features available by release. The Release Content Document is available on *OracleMetaLink*.
- **About document:** Refer to the About document for information about your release, including feature updates, installation information, and new documentation or documentation patches that you can download. The About document is available on *OracleMetaLink*.

See Related Documents on page xii for more Oracle Applications product information.

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Structure

- 1 **Oracle Advanced Pricing**
- 2 **Qualifiers and Qualifier Groups**
- 3 **Modifiers**
- 4 **Formulas**
- 5 **Price Lists**
- 6 **Archiving and Purging Pricing Entities**
- 7 **Multi-Currency Conversion Lists**
- 8 **Agreements**

- 9 Pricing Engine Request Viewer**
- 10 Reports and Concurrent Programs**
- A Formula Scenarios**
- B Modifier Scenarios**
- C Windows and Navigator Paths**

Related Documents

Oracle Advanced Pricing shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Advanced Pricing. You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides. If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Guides Related to All Products

Oracle Applications User's Guide

Use this guide to learn how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes. You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Oracle Applications Developer's Guide

Use this user guide to learn about the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the Oracle Applications User Interface Standards. It also provides information to help you build your custom Oracle Developer forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Guides Related to This Product

Oracle Advanced Pricing Implementation Manual

This manual contains the information you need to set up, implement, and administer Oracle Advanced Pricing and related functionality such as pricing security.

Oracle Order Management User's Guide

This guide describes how to enter sales orders and returns, copy existing sales orders, schedule orders, release orders, create price lists and discounts for orders, and create reports.

Installation and System Administration

Oracle Advanced Pricing Implementation Manual

This manual contains the information you need to set up, implement, and administer Oracle Advanced Pricing.

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications, Release 11i. It is a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11i, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack, by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11i. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11i. You cannot upgrade to Release 11i directly from releases prior to 10.7.

"About" Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the "About" document for your product. "About" documents are available on *OracleMetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11i. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11i. You cannot upgrade to Release 11i directly from releases prior to 10.7.

Oracle Applications System Administrator's Guide

The guide provides planning and reference information for the Oracle Applications system administrator. The guide contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the UI standards followed by the Oracle Applications development staff. It describes the UI for Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11i. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide explains how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle Advanced Pricing implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps users convert data from existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on *OracleMetaLink*.

Oracle Applications Message Manual

This manual describes all Oracle Applications messages. The guide is available in HTML format on the documentation CD-ROM for Release 11i.

Training and Support

Training

Oracle offers a complete set of training courses to help users and their staff master Oracle Advanced Pricing and reach full productivity quickly. These courses are organized into functional learning paths, so users take only those courses appropriate to their jobs or areas of responsibility. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many education centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information needed to keep Oracle Advanced Pricing working for all users. This team includes the technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Oracle Advanced Pricing

This chapter covers the following topics:

- Overview of Oracle Advanced Pricing
- Pricing Security
- Using Oracle Advanced Pricing in the HTML Interface
- General Pricing Concepts
- Pricing Components

Overview of Oracle Advanced Pricing

Oracle Advanced Pricing supports e-business applications by providing a flexible pricing engine that executes pricing and promotional calculations for Oracle Order Management and other Oracle Applications. This application is licensed as Oracle Advanced Pricing.

Note: For more information on implementation steps, setup procedures, and profile options, see: *Oracle Advanced Pricing Implementation Manual*.

Oracle Advanced Pricing provides the flexibility to meet the needs of complex pricing situations for a range of demanding industry business requirements which include:

- Consumer goods, telecommunications, services, high technology, automotive, and aerospace/defense businesses which sell to other businesses.
- Telemarketing, mail order catalog, and web store businesses which sell directly to consumers.

Oracle Advanced Pricing provides advanced pricing capabilities that enable you to set up your pricing information and to model complex data relationships to determine the correct price.

With Oracle Advanced Pricing, you can perform the following functions:

- Create a list price for an item or item hierarchy.
- Set a list price based on volume breaks.
- Assign security privileges to pricing users to control their view or maintain access to price lists and modifiers. Control which operating units can use price lists or modifiers.

- Define price breaks using block pricing to evaluate prices as a single block. For example, if item weight is between 5-15 pounds, then the price is \$5. If the weight is between 16-30 pounds, the price is \$10.
- Do Price List Maintenance tasks such as searching across a single or multiple price lists and updating the price, formula, or effective dates of price list lines.
- Usage Pricing/counter price: calculate price based on usage brackets.
- Point break (all quantity in one bracket).
- Use price breaks (quantity in each break gets the price of that break).
- Set a list price/ discounts at multiple levels of flattened hierarchies and use precedence to select the right price/discount.
- Define a formula to dynamically calculate the price based on simple or a complex formula or to create a price relation (price of item A is Price of Item B + \$20).
- Create multiple currency conversion criteria for a single base currency price list.
- Set up GSA prices.
- Define pricing agreements.
- Get a price/discount from an external source (my price = competitors price - 5%).
- Set a percent/fixed/lump sum discount or surcharge.
- N-Dimensional Pricing (if width between 2-4 and thickness between 1-3 then multiply the price by 0.3).
- Benefit/surcharge based on total volume of multiple order lines of the same order.
- Set up deals and promotions.
- Buy one get one free.
- Coupon issue (Buy over \$1000 and get a coupon of \$100 for future purchase).
- Other item discount (Buy A and B get 20% off on C).
- Item Upgrade (For the price of 12 Oz. Shampoo get 16 Oz. Shampoo).
- Terms upgrade (Buy over \$100 and get upgraded to air shipment).
- Set discounts as *to be accrued*.
- Set up freight and special charges.
- Mark discounts as exclusive or incompatible to each other.
- Create Cascading discounts (discounts to be applied on subtotals).
- Set spending and usage constraints to stop application of promotion when limit is reached.
- Query on multiple modifier criteria across all modifier setups.
- Create your own eligibility conditions by grouping the qualifiers.
- Define your own qualifier and qualifier sourcing rules (if today = Sunday then give 10%).
- View the criteria that the engine uses to select price and modifiers for a pricing request.

Oracle Advanced Pricing and its pricing engine work through open, business object oriented APIs. The following Oracle Application Suites use the pricing engine:

- Oracle Order Management
- Oracle Customer Relationship Management
- Oracle Procurement

Pricing Security

In Oracle Applications, a basic level of security called *functional security* is used to manage users' access to each application and control their access to windows, functions, and reports within an application.

Typically, the System Administrator administers functional security and assigns operating unit, responsibility, and system access to users. See the *Oracle Applications System Administrator's Guide* for more information about functional security.

Oracle Advanced Pricing provides an additional level of security (in addition to the existing functional security) called *pricing security*. Pricing security can be used to restrict pricing activities such as updating and viewing pricing entities to users granted specific access privileges. Pricing security is set up and maintained in the HTML user interface by a user who is assigned the Oracle Pricing Administrator responsibility. The Oracle Pricing Administrator has the authorization to access and update all pricing entities such as price lists, pricing agreements, and modifiers for all authorized users. See the *Oracle Advanced Pricing Implementation Manual*, Pricing Security section, for more information on pricing security.

Security Privileges

Security privileges enable you to define who can access each pricing entity and the level of access permitted: View Only or Maintain. The Pricing Administrator is typically responsible for setting up security privileges. For more information on security privileges and other security features, see: *Oracle Advanced Pricing Implementation Manual*.

Pricing Security (HTML Interface)

Pricing security settings also impact the Update/Details icons for price lists and modifiers in the HTML user interface in the following ways:

When Pricing Security is ON

- If the modifier or price list has Maintain and View privileges and belongs to the same PTE/Source System as the user's profile, the Update icon will be enabled and the Details icon will be disabled.
- If the modifier or price list has Maintain and View privileges and belongs to a different PTE/Source System, as the user's profile, the Update icon will be disabled and Details icon will be enabled.
- If the modifier or price list has View-privilege only, the Update icon will be disabled and Details icon will be enabled, regardless of the PTE/Source System the modifier or price list belongs to.

When Pricing Security is OFF

- If the modifier or price list belongs to the same PTE/Source System as the user's profile, the Update icon will be enabled and Details icon will be disabled.
- If the modifier or price list belongs to a different PTE/Source System as the user's profile, the Update icon will be disabled and Details icon will be enabled.

Related Topics

Oracle Advanced Pricing Implementation Manual, Pricing Security

Using Oracle Advanced Pricing in the HTML Interface

For many pricing features, Oracle Advanced Pricing provides an HTML-based user interface (UI) that features guided steps and user-friendly pages for setting up and maintaining modifiers, price lists, and qualifiers. You can use HTML user interface to complete many of the pricing tasks that were previously only available in the Oracle Forms-based interface.

To access the HTML user interface, select the Oracle Pricing User responsibility and click the Home link to display the **Oracle Advanced Pricing Home** page.

Note: The HTML user interface is available only in Oracle Advanced Pricing.

The following graphics compare the HTML UI and Forms-based UI used in Oracle Advanced Pricing. The first example shows an Oracle Advanced Pricing HTML page used to create a price list.

Example of Oracle Advanced Pricing HTML format: Create Price List page

ORACLE[®] Advanced Pricing [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

Price Lists | **Modifier Lists**

General Information | **Qualifiers** | **Review**

Create Price List: General Information

* Indicates required field

Name **Freight Carrier**

Description **Freight Terms**

Pricing Transaction **Order Fulfillment** **Payment Terms**

Entity **Source System** **Oracle Pricing** **Start Date** (example: 22-FEB-2004)

Currency **End Date**

Comments **Round To**

☒ Mobile Download

Secondary Price Lists

Price List Name	Description	Precedence	Delete
NS-PriceList7i	HTML UI - PLL	140	

[Add Another Row](#)

[Cancel](#) Step 1 of 3 [Next](#)

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The second example shows an Oracle Advanced Pricing Forms-based window used to create a price list.

Example of Oracle Advanced Pricing Forms-based format: Advanced Pricing - Price Lists window

Advanced Pricing - Price Lists

Main Other

Name: Business World ☐ Mobile Download ☒ Active

Description: Price List for Business World

Currency: USD Multi-Currency Conversion: Generated Currency Co Round To: -2

Effective Dates: - Payment Terms: 30 Net

Freight Terms: Prepay & Add Freight Carriers:

Comments:

List Lines Secondary Price List Qualifiers

Product Context	Product Attribute	Product Value	Product Description	U
Item	Item Number	Vision	Vision	E
Item	Item Number	#80000	Sentinal Multimedia	E
Item	Item Number	#81000	One Year Maintenance - reve	E
Item	Item Number	#82000	Consulting/Training	E
Item	Item Number	CM31556	Monitor - 19" Flat	E

Price Breaks Pricing Attributes

You can use the HTML UI for completing the following common pricing tasks:

- Create price lists, price list lines and price break lines for price lists.
- Create the following modifier list types:
 - Deal List
 - Discount List
 - Promotional Goods
 - Surcharge List
- Create the following modifier line types:
 - Discount
 - Surcharge
 - Price Break
 - Promotional Goods
- Maintain price lists in the Price List Maintenance feature.
- Create qualifiers for price lists and modifiers.
- Search for price lists or modifiers.

Cross-Format Compatibility

For features unavailable in HTML, you can still use the Forms-based user interface to set up and maintain pricing functions and features as in previous releases. If an entity cannot be created in HTML, for example, qualifier groups, then you must use the Forms-based UI for these tasks.

Note: Pricing entities such as price lists, modifiers, or qualifiers created in one format can be maintained in the other. For example, if you created a price list in the Forms-based UI, you could update and maintain the price list in the HTML UI.

Navigation flow behavior in HTML user interface

The following section describes selected HTML user interface behavior when navigating through certain flows in the **Price List**, **Modifier List General Info**, and **Qualifiers** pages.

Behavior 1

The following table summarizes expected outcomes when you make changes in the **Price List**, **Modifier List General Information**, and **Qualifiers** pages:

Page Name	Action	Outcome
Price List, Modifier List General Information, Qualifiers	Make changes, click Apply.	Information is saved > Price/Modifier Lists rollup page displays.
Price List, Modifier List General Information, Qualifiers	Make changes, click Cancel.	Changes are not be saved and the Price List/Modifier Lists rollup page displays.
General Information or Qualifiers	Click Cancel after a line has been created and saved.	The line changes are already saved.

Behavior 2

After creating a price list or modifier list, you can make changes to the list by updating fields on the **General Information** or **Qualifiers** page:

- If you change information in the **General Information** or **Qualifiers** page, then navigate to the Lines page and either create or update a line, a dialog box displays and asks if you want to continue to save the changes on the **General Information** and **Qualifiers** page:
 1. If you click Yes to Continue, then the changes from the **General Information** and **Qualifier** pages are saved and you continue with the flow. Any deleted lines will also be saved.
 2. If you click No, you return to the Lines page. The changes are kept but not saved. If lines have been deleted, you must click Apply to save the changes.
- If you create or update a line without going making any changes to the **General Information** and **Qualifiers** page, then the dialog box does not display and you can proceed directly into the create or update flow.
- If you cancel a create/update line flow, then you must click Apply on the **General Information**, **Lines**, or **Qualifiers** pages to save the changes to the list.

Behavior 3: Deleting

For price list lines, the delete is not saved until you click Apply in the Lines page. No warning or confirmation message is displayed.

Qualifiers or qualifier conditions are not permanently deleted until you click the Apply button. A warning or confirmation message does not display.

Related Topics

Oracle Advanced Pricing Home page (HTML Interface), page 5-31

Using Modifiers in the HTML User Interface, page 3-47

Using Price Lists in the HTML User Interface, page 5-2

Creating Qualifiers (HTML Interface), page 2-4

Using the Price List Maintenance feature (HTML Interface), page 5-50

General Pricing Concepts

The pricing engine receives transaction information, prepares pricing requests, selects price lists and modifier lists, and applies price adjustments (benefits) to the transaction.

The pricing engine, displayed in the following graphic, evaluates the following questions to determine a price:

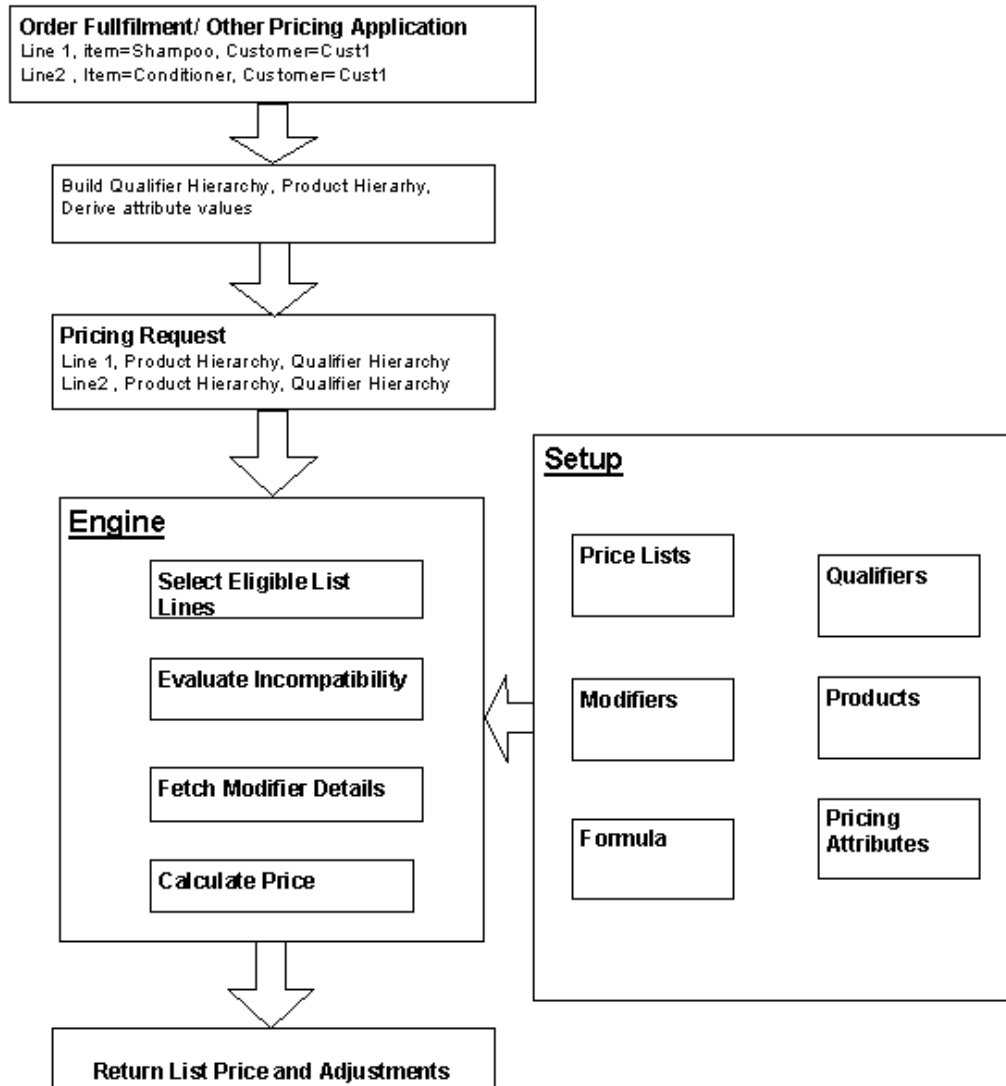
- Who qualifies for prices and benefits?
- What is the product hierarchy and what pricing attributes pertain to this item or service?
- How should I adjust the order price or order line price?

The following diagram shows the elements of the pricing concept:

- A sales order
- The qualifier hierarchy
- The pricing request
- The pricing engine
- The list price and adjustments
- The setup entities: Price lists, qualifiers, modifiers, products, formulas, and pricing attributes

After the diagram, the text explains these elements.

Pricing Overview



Who Qualifies?

Pricing qualifiers control who is eligible for certain prices (price lists) and benefits (modifiers).

Some example qualifiers are:

- Customer Class = VIP
- Order Type = Special

Who Qualifies?

What is the Product Hierarchy and Pricing Attributes?

The *product hierarchy* and *pricing attributes* control what is being priced or modified on a price list or modifier list.

An example of a product hierarchy with pricing attributes is All Plastic items of Grade B quality get 50% discount.

How Should I Adjust the Price?

Pricing modifiers control how a modifiers affect the final price (selling price).

Some example modifiers are:

- Discount of 2%
- Buy 1 get 1 free
- Get 480 ml shampoo for the same price as 360 ml shampoo
- Get a coupon for 100 currency units if you buy over 1000 currency units

Pricing Engine

The advanced, flexible pricing engine performs pricing and benefit calculations for Oracle Order Management products and Oracle Customer Relationship Management products through open APIs.

The pricing engine performs the following functions:

- Prepares the price request structure
- Selects applicable price lists and modifier lists
- Determines base list price
- Calculates final selling price
- Applies benefits and surcharges (from modifier lists) to list price to determine selling price

Preparing the Price Request Structure

The calling applications submit price requests. This function configures a pricing request into a pricing request structure. The pricing request structure provides information about all the qualifiers and product pricing attributes.

Selecting the Price List or Modifier List

This function selects which price lists are eligible for the current pricing request. It uses the qualifiers and pricing attributes to select an eligible list of prices or modifiers it can apply to the pricing request lines according to the certain rules.

Determining List Price

This function takes the validated price list lines and applies them to the pricing request lines. You can specify the list price on a price list as unit price, percent price, or formula.

Applying Price and Modifier Adjustments

This function takes the validated modifier list lines and applies them to the pricing request lines.

The modifier function provides price adjustments such as discounts, price breaks, surcharges, coupons, item and term substitutions, and other item discounts. Discount and surcharges modifiers affect the selling price; freight charge modifiers do not affect the selling price.

Pricing Components

Qualifiers and Qualifier Groups

Qualifiers control who receives benefits, and can be used to assign discounts and promotions to:

- Specific customers
- Customer groups
- Order types
- Order amount
- Specific customer or group of customers

Qualifier groups allow you to group multiple conditions and to assign them to a single benefit. For more information, see: *Oracle Advanced Pricing User's Guide, Qualifiers*.

Pricing Attributes

Pricing attributes control what is being priced or modified on a price list or modifier list. See the *Oracle Advanced Pricing Implementation Manual* for information about creating new contexts and attributes, attribute management, mapping rules, and associated functionality.

Price Lists

Price lists contain prices and currencies associated with products and services. Each price list contains basic header information with one or more item lines. Price lists can have:

- Prices for specific products and services or for product groups
- Prices as absolute values, percents of other prices, or as formulas
- Prices applicable to the entire organization or to one operating unit
- Negative prices

For more information, see: *Oracle Advanced Pricing User's Guide, Price Lists*.

Modifier Lists

Pricing modifiers control how the pricing engine can modify the pricing requests and pricing request lines. You can select from the following modifier list types and then add modifier lines to define the actual adjustments or benefit such as a 10% discount:

- Deal
- Discount List
- Freight and Special charge List
- Promotion
- Surcharge List

The following table shows scenarios with examples of the qualifiers, modifiers, and pricing attributes that support them:

Scenario	Qualifier	Modifier	Product Hierarchy	Pricing attribute
XYZ Corporation gets 10% discount on all the products	Customer = XYZ Corporation	10% discount	Null	Null
If Order_Type = Return and customer class = Retail then apply 15% surcharge for all the "Electronic" items.	Order Type = Return Customer Class = Retail	15% Surcharge	Electronic Items	Null
Grade B Motor Oil gets \$20 off	Null	\$20.00 discount	Motor Oil	Grade B

See Oracle Advanced Pricing User's Guide, Overview of Modifiers, page 3-1 for more information on modifier list and line types and using modifiers.

Formulas

Pricing formulas allow the pricing engine to determine item prices based on the following:

- A combination of pricing attributes and factors based on the value of a pricing attribute
- The list price on the price list line to which the formula is attached
- The list price on any specific price list line
- A numeric constant
- A customizable function

You can also attach a formula to a modifier line to calculate discounts. A price list line uses two types of formulas:

- Static: You specify the formula and execute a concurrent process which calculates absolute price values.
- Dynamic: You specify the formula and the pricing engine uses the formula in its calculations each time that someone orders the product.

For more information, see: Oracle Advanced Pricing User's Guide, Formulas.

Pricing Service Items

The pricing engine prices service items in the same way that it prices inventory items. In Oracle Order Management, the parent item is the serviceable item and must be in the install base. Oracle Order Management passes both the serviceable item and the service item to the pricing engine; the pricing engine first prices the serviceable item and then prices the service item.

You can price service items as follows:

- Unit price: You set a list price for the service item.

- Percent price: You set a percentage; the price of the service item is that percentage of the serviceable item list price. To use this method, select the flag Service Item in the Service tab when you define the item.

The following order management attributes are passed by the pricing engine application program interface (API) when pricing service items:

- Ordered Quantity (API: P_Line_Tbl.Line_Quantity): The order quantity of the service item expressed in the in the serviceable item unit of measure.
- Ordered UOM Code (API: P_Line_Tbl.Line_Uom_Code): The unit of measure in the time scale.
- Service Duration and Service Period (API: P_line_Tbl.UOM_Quantity): The duration of the service being ordered, for example, to order Computer Maintenance for one year, set Service Duration to 1 and Service Period to Year. These values are available in the Service tab when you enter the item in the order. In the API, P_line_Tbl.UOM_Quantity is the service duration expressed in Ordered UOM Code service period.

Oracle Order Management Service Item: Pricing Example

Price list setup for laptop computer:

- Product: Laptop Computer
- Application Method: Unit Price
- UOM Code: EA
- List Price: 1000 currency units

Price list setup for computer service-unit price method

- Product: Computer Service
- Application Method: Unit Price
- UOM Code: Month
- List Price: 10 currency units

Price list setup for computer service-percent price method

- Product: Computer Service
- Application Method: Percent Price
- UOM Code: Month
- Percent Price: 2

Order line

- Product: Computer Service
- Ordered Quantity: 1
- Ordered UOM: Month
- Service Period: Year
- Service Duration: 1
- Serviceable Item: Laptop Computer

List price calculation for computer service

- Unit price method: 10 currency units per month * 12 months service period/duration = 120 currency units

- Percent price method: (1000 currency unit laptop computer * 2% computer service percent price) * 12 months service period/duration = 240 currency units

Implementation Planning

Visualizing the price bands of an organization may assist you in developing an effective implementation plan for Oracle Advanced Pricing.

Note: See the Oracle Advanced Pricing Implementation Manual for information on implementation steps, setup procedures, and profile options.

The following table provides a visual guide for mapping the modifiers of an organization to the components of Oracle Advanced Pricing.

The source pricing data is based upon the assumptions that item Super Wine has an item category of *Wine*. An order for a quantity 15 was placed on *15-Jun-2000* for a customer *XYZ Corporation*, who belongs to a customer class *VIP*.

Buckets	Pricing Phases	Incompat. Group	Qualifiers/ Product Attributes (Precedence)	Modifiers/ Price List	Discount	Sub Total
Base Price	List Line Base Price	EXCLUS IVE	Customer Class - VIP (310) Item Code - Super Wine (220)	Corporate List - \$1000	Null	Null
Base Price	List Line Base Price	EXCLUS IVE	Item Category - Wine (290)	Preferred Vendors - \$800	Null	Null
Base Price	List Line Base Price	Null	Null	Null	Null	\$1,000
Bucket 1	List Line Adjust- ments	Level 1	Item Quantity > 10 (800) Item Code - Super Wine (220)	4 th July Promotion 10%	\$100	Null
Bucket 1	List Line Adjust- ments	Level 1	Customer Class - VIP (310)	Summer Promotion 15%	Null	Null
Bucket 1	List Line Adjust- ments	Level 2	Customer id - XYZ Corp (260)	VIP discount \$40	\$40	Null
Bucket 1	List Line Adjust- ments	Level 2	Customer id - XYZ Corp (260)	Weekday Discount \$20	Null	Null
Bucket 1	All Line Adjustments	Level 1	Item Category - Wine (290)	General Discount - \$20	\$10	Null

Buckets	Pricing Phases	Incompat. Group	Qualifiers/ Product Attributes (Precedence)	Modifiers/ Price List	Discount	Sub Total
Bucket 1	All Line Adjust-ments	Exclusive	Order Date < 01-Dec-2000 (510)	Seasonal Discount - \$10	Null	Null
Bucket 1	Header Level Adjustments	Level 1	Null	Preferred Customer 10%	100	Null
Bucket 1	Line Charges	Level 1	Null	Handling Charge \$20	\$20	Null
Bucket 1	Header Level Charges	Level 1	Null	Null	Null	Null
Bucket 1	Header Level Charges	Null	Null	Null	Null	\$750
Bucket 2	Adjustments	Level 2	Null	High usage surcharge 2%	(\$15)	Null
Bucket 2	All Line Adjustments	Level 2	Null	Null	Null	Null
Bucket 2	Header Level Adjustments	Level 2	Null	Null	Null	Null
Bucket 2	Line Charges	Level 2	Null	Null	Null	Null
Bucket 2	Header Level Charges	Level 2	Null	Null	Null	Null
Bucket 2	Header Level Charges	Level 2	Null	Null	Null	Null
Bucket 2	Null	Null	Null	Null	Null	\$765

The following factors should be considered when planning your implementation. For more information on setting up, see: *Oracle Advanced Pricing Implementation Manual*.

List price

Decide whether your prices are at an individual product level or at the product hierarchy or both. Also, determine the precedence levels in your organization. Determine if you base list prices on the volume purchased. Plan the number of price lists. To get a better performance, minimize the number of price lists and price list lines by using a combination of qualifiers, modifiers, pricing attributes, and formulas.

Based upon the source pricing data, the product attribute Item Code of Super Wine for Corporate price list has a product precedence of 220, where as product attribute

Item Category of Wine for Preferred vendors price list has a product precedence of 290. Pricing picks up a list of lower precedence and hence \$1000 from Corporate List is returned. This is because the pricing phase “List line base price” has “Precedence” for resolving the incompatibility.

Modifier types

Categorize your discounts and promotions into the appropriate modifier types; each modifier type produces different results. For example, the Other Item Discount requires the customer to order the original item as a prerequisite to offering the discount; however, the Promotional Goods discount adds a new line to the order.

Buckets

The pricing engine may calculate different selling prices depending on how you group your discounts into buckets. Plan your cascading discounts so that you can assign discounts to buckets based on the subtotal on which each discount needs to be applied.

Phases

Decide to which event and phase each discount and promotion belongs. Oracle recommends that you place:

- Line level discounts in the Line Adjustments phase
- A promotion such as Buy items A and B and get a discount on Item C in the All Lines phase
- Modifiers to apply when orders ship in a ship event

Phases are also associated with order events. To apply a discount only when an order is shipped, assign the modifier to a phase which is executed in SHIP event.

The pricing phase assigned to a modifier determines when the modifier’s adjustment or benefit is applied. For example, a modifier assigned to the List Line Adjustment phase is applied after leaving the order line, while a modifier assigned to the All Lines Adjustment phase is applied only after the order line is *saved*.

Suppose you create a Discount modifier (10% discount) and assigned it to the All Lines Adjustment phase. Then suppose you applied the modifier to the a sales order with Item AS54888 (list price \$200) with an ordered quantity of 1. If the order line is entered but not saved, the list price (\$200) alone is retrieved. But when the order line is saved or when moving to the the line is exitedthe move to the next line, the modifier assigned to the All Lines Adjustment phase is applied and the price changes to \$190.

See the *Oracle Advanced Pricing Implementation Manual* for more information on pricing phases.

Incompatibility groups and exclusivity

Determine the pricing bands to which the various discounts and promotions belong. Determine which discounts and promotions apply on top of one another, are incompatible, or are exclusive. Analyze all discount schemes and promotions to determine the impact.

Based upon the source pricing data, the bucket *Bucket 1* and pricing phase *List Line Adjustments* has two Incompatibility groups called *Level 1* and *Level 2*. *Level 1* has two promotions: *4th July Promotion* and *Summer Promotion*. The *4th July Promotion* has a product precedence of 220 and *Summer promotion* has a qualifier precedence of 310. The

4th July promotion is picked from incompatibility group *Level 1* because it has the lower precedence.

Incompatibility Group *Level 2* has two discounts: *VIP discount* and *Weekday Discount*, both with a qualifier precedence of 260. Pricing resolves the incompatibility by picking the best discount.

The bucket *Bucket 1* and pricing phase *All Line Adjustments* has two incompatibility groups: *Level 1* and *Exclusive*. Although *General Discount* in *Level 1* has a lower product precedence, *Seasonal discount for \$10* which is in the *Exclusive* bucket is picked up by the engine.

Note: The pricing engine determines incompatibility and exclusivity within phases.

Modifier levels

Categorize the modifiers into line, group line, and order modifiers. How the pricing engine treats a modifier can change depending on your classification.

Automatic, Override, Asked for, and Accrual flags

It is very important that you understand how the pricing engine operates with these flags so that you can set them to reflect your business needs. Analyze all of your discounts, promotions, and charges in terms of these features.

Other setups

Precedence preferences, profile options, break types, and pricing attribute control the pricing engine behavior. Determine the values for these settings that reflect your business needs.

Precedence setups

Evaluate default precedence values for qualifiers and product hierarchy and change them to reflect your business needs.

For a list of seeded precedence values, see: Oracle Advanced Pricing User's Guide, Pricing Attribute Seed Data.

Unit of Measure

Decide the pricing units of measure for each item because it determines if the pricing engine selects a modifier.

The list price in the order unit of measure overrides the precedence. When it processes a pricing request, the pricing engine first chooses eligible price list lines whose unit of measure matches the calling unit of measure. If there are multiple price list lines with matching unit of measure, the pricing engine chooses the price list line with the better precedence. If there are no price list lines with matching unit of measure, the pricing engine looks for price list lines with selected primary unit of measure flag for that item, then chooses the best precedence price list line.

Determine whether you need to set up new qualifier attributes and mapping rules. While Oracle Advanced Pricing has certain qualifier attributes and mapping rules seeded, you may need to define discounts, promotions, and charges based on other qualifier attributes.

See the *Oracle Advanced Pricing Implementation Manual* for information about attribute management, mapping rules, and associated functionality.

Qualifiers and Qualifier Groups

Overview of Oracle Advanced Pricing Qualifiers

Oracle Advanced Pricing lets you define qualifiers to determine eligibility rules governing who can receive a particular price, discount, promotion, or benefit. Qualifiers and qualifier groups can then be linked to Oracle price lists and modifiers.

Oracle provides predefined (seeded) qualifier contexts and attributes. Qualifier values for these predefined attributes are sourced from the Oracle Application database whenever applicable. The following table illustrates several predefined structures that can be used in determining benefit eligibility.

Qualifier Context	Qualifier Attributes
Customer	Customer Name, Bill To, Sales Channel
Order	Order Type, Shipment Date, Line Type
Terms	Payment Term, Freight Terms, Shipping Method
Volume	Order Amount, Line Volume. Note: Order Amount as a qualifier refers to the sum of the list prices on all active order lines. It is not the same as Order Total in Oracle Order Management which can include the effect of modifiers.

See the *Oracle Advanced Pricing Implementation Manual* for more information on seeded attributes.

You can set up qualifier context and attributes to suit your own business needs to determine eligibility for benefits or price.

Qualifier Terms

The following describes some main qualifier terms:

Qualifier Contexts

Qualifier contexts consist of flattened hierarchies where similar qualifying attributes can be grouped into logical categories.

Qualifiers

Qualifiers consist of specific attribute conditions that assist the pricing engine to derive the eligibility for a benefit or price.

Qualifier Value

A qualifier value is a value you choose to associate with a qualifier attribute.

Qualifier Grouping Numbers

A qualifier consists of qualifier lines that define eligibility for a particular price, discount, promotion, or benefit. Qualifier grouping numbers are assigned to qualifier lines to create AND and OR conditions that define how the pricing engine should evaluate the qualifier lines.

Note: In the HTML user interface, Common and Unique qualifiers are used to create grouping conditions instead of grouping numbers. See *Creating Qualifiers (HTML Interface)*, page 2-4 for more information.

Using Qualifiers

Qualifiers and qualifier groups can be associated with Oracle price lists and modifiers at the following levels:

- Price list: Price List
- Modifier: Modifier list and modifier line

Various methods can be used to associate qualifiers with price lists or modifiers:

- Create qualifier(s), and then attach individual qualifiers within the Price List or Modifiers window.
- Create qualifier groups using the Qualifier Groups window and then attach the qualifier group to the price list, modifier list, or modifier list line.
- Any combination of method 1 and 2.

Once an entity has qualified for a particular benefit, Oracle Advanced Pricing attributes can further refine which benefits can be given.

You can create, modify, query, and delete qualifier groups.

You can set up hierarchies using qualifier contexts and attributes. Flattened format is required as qualifiers do not store any relationships among the hierarchies. The following table illustrates a hierarchy with 3 different levels of qualifier attributes. This hierarchy can be stored by creating a context such as *Geography*. Under this context, you would define 3 attributes, such as State, Territory, and Customers.

Qualifier attribute	Qualifier attribute value
State	CA, MN,WA,NY,FL
Territory	East, West, South, North
Customers	all customers, subset of customers by purchase volume

To enable the user to select and enter correct values for the three attributes, you would have to define specific validation sets for each attribute, using value set definitions to provide the correct source.

For more information on Value Sets, see *Oracle Applications Flexfields User's Guide*, Planning and Defining Values and Value Sets.

Since hierarchical relationships are not stored, you need to define the sourcing information. This is required because when the pricing engine has to make a determination as to whether a particular customer can receive a particular benefit, the engine needs to know the information at all the levels of hierarchy.

In this hierarchy, if the qualifying conditions established were that Territory must be West and State must be California, then the pricing engine would need to know both the Territory and the State of the customer in order to determine eligibility. If the qualifying conditions established were that Territory must be West or State must be California, then the pricing engine would need to know only the Territory or the State of the customer in order to determine eligibility.

Qualifier Group Impact when Merging Customers (Oracle Receivables)

When you merge customers in Oracle Receivables, you can merge:

- The information from one customer (the From customer) with the information from another customer (the To customer).
- The information from one or more customer sites of that customer (the From sites) with the site information from the other customer (the To sites).

If the From customer is referenced in any qualifiers (the qualifier context is Customer), the Oracle Receivables merge process executes an Oracle Advanced Pricing process to update the following qualifier information:

- If you merge customer: The process changes the customer name on the qualifier from the From customer to the To customer.
- If you merge sites: The process changes the site from the From customer to the To customer for qualifiers with the following attributes:
 - Bill To
 - Site Use
 - Ship To

Verify these changes in the Value From and Value To fields of the following windows:

- Qualifier Group form, Qualifiers tab
- Advanced Pricing - Price Lists window, Qualifiers tab
- Qualifiers - Header Level Qualifiers window (from Advanced Pricing - Define Modifier window), Qualifiers tab
- Qualifiers - Line Level Qualifiers form (from Advanced Pricing - Define Modifier window), Qualifiers region

Creating Qualifiers for Price Lists

See *Oracle Advanced Pricing User's Guide*, Price Lists, page 5-2 , for more information on creating qualifiers or attaching a qualifier group to price lists (for Forms-based user interface).

Creating Qualifiers for Modifiers

See *Oracle Advanced Pricing User's Guide*, Modifiers, page 3-15, for more information on creating qualifiers or attaching a qualifier group to modifiers and modifier lines (for Forms-based user interface).

Creating Qualifiers (HTML Interface)

A qualifier consists of one or more conditions that define eligibility for a particular price, discount, promotion, or benefit. You can assign qualifiers and qualifier groups to modifiers lists, modifier lines, and price lists. You can create different qualifying conditions depending on how you set up your qualifiers. The different qualifying rules are outlined as follows:

Qualifier Conditions

A qualifier condition defines an eligibility rule, for example, the customer name must be Vision Operations. You can set up one or more conditions for a single qualifier. Multiple conditions within the same qualifier are joined to each other by AND:

- Condition1: Customer Name must be Vision Corporation **AND**
- Condition 2: Order Type must be Standard **AND**
- Condition 3: Credit Type must be Good

If ALL the qualifier conditions are met, then the qualifier evaluates as true, and the modifier or price list can be applied.

Unique Qualifiers

Each separate qualifier created for a modifier or price list is called a *unique* qualifier. Unique qualifiers are evaluated by an OR condition; for example, either Qualifier 1 OR Qualifier 2 can qualify before the price list or modifier is applied.

Each unique qualifier may consist of one or more conditions. The conditions for each unique qualifier are still joined by AND and must evaluate as true before the modifier or price list is applied:

- Qualifier 1
 1. Customer = Vision Operations
 2. Customer Class = Gold Standard
- OR
- Qualifier 2
 1. Customer Region = Western

Common Qualifier

A Common Qualifier is used to create a mandatory condition across all qualifiers. A common qualifier consists of conditions which are joined by AND to all qualifiers in a table. When created, it displays on the qualifier table as a Common Qualifier.

Note: In the Forms-based interface, Grouping Numbers are used to create AND/OR conditions. A grouping number of -1 is used to create the Common qualifier conditions. See *Using Qualifier*, page 2-11 for more information on Forms-based qualifier grouping numbers.

You can create a common qualifier by selecting the Common Qualifier box when creating a qualifier. The search engine processes the common qualifier conditions first, and

only processes other unique qualifiers if the pricing request qualifies for the common qualifier conditions.

For example, suppose you wanted to give a 10% discount with the following qualifying conditions.

- Qualifier 1: Customer is Preferred status.
- Qualifier 2: Customers must order more than \$150 from your web site.

So far the customer can receive the discount if their status is Preferred OR if they order more than \$150 from your web site. However, suppose you wanted to make a mandatory condition that the customer must pay by Credit Card.

To do this, you must set up a Common Qualifier where the payment method = Credit Card to make it a mandatory condition across all qualifiers. This means that either Qualifier 1 OR Qualifier 2 could qualify but regardless, the payment method must be Credit Card.

To create a qualifier:

1. Navigate to the **Create Qualifiers** page. The actual page name may vary depending on the modifier type or price list associated with the qualifier.

Create Qualifiers page

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[Home](#) [Lists](#)

Price Lists | **Modifier Lists**

General Information | **Qualifiers** | Review

Create Discount List: Qualifiers

You can add qualifier conditions by clicking on "Create Qualifier". If you want to add a predefined set of qualifiers, click on "Append Group".

[Cancel](#) [Back](#) Step 2 of 3 [Next](#) [Finish](#)

List Name **Disc_withQualifiers**

[Append Group](#) [Create Qualifier](#)

Qualifiers	Context	Operator	Value From	Value To	Start Date	End Date	Update	Delete
No data exists.								

Qualifier

Qualifiers are eligibility conditions that must be met before a price list or modifier can be applied. Qualifier Groups are pre-existing qualifier conditions that can be reused on price lists or modifiers.

[Cancel](#) [Back](#) Step 2 of 3 [Next](#) [Finish](#)

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2. From this page, you can create a qualifier or append an existing qualifier group for price lists and modifiers. To append a qualifier group, see [Appending a Qualifier Group \(HTML Interface\)](#), page 2-8 for more information.
3. Click **Create Qualifier** to display the **Qualifiers: Create Qualifier** page.

Qualifiers: Create Qualifier page

ORACLE[®] Advanced Pricing

Diagnostics Home Logout Preferences Help

Price Lists | Modifier Lists

General Information Qualifiers Review

Qualifiers: Create Qualifier

Cancel Apply

☐ This is a common qualifier

Attribute	Context	Operator	Value From	Value To	Start Date	End Date	Precedence	Delete
Customer	Intercompany Invoicing	Is	Vision Corpor				3	

Add Another Row

Cancel Apply

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4. Optionally, select This is a common qualifier to create a Common Qualifier, page 2-4. The conditions defined for a Common Qualifier will apply in addition to all unique qualifiers.

Note: When creating a new qualifier, if a common qualifier has been created, the conditions of the common qualifier are displayed as read only.
5. Select an Attribute to define a condition for the qualifier; for example, the Customer Class (attribute) is Platinum. You can create one or more conditions for each qualifier. Each condition is added as a new row in the table for the qualifier.

Note: Each condition within a qualifier are linked by AND conditions. This means that each condition within the qualifier must be met before the qualifying conditions are satisfied.
6. Select from the following Operator values: Is, Is not, and Between. The operator value links the attribute to the value; for example, the Customer Name *Is* Vision Corporation.
7. Select the Value From/To.
8. Select a range for the Start/End Dates. If left blank, then the condition will not expire.
9. Enter a Precedence value. The precedence value defaults from the attribute selected and can be updated. This value is used in incompatibility processing.
10. Optionally, click Add Another Row to add another qualifier condition.

11. Click Apply to save your changes and view the newly-created qualifier. Click the Expand node to view the qualifier details.
12. Optionally, click Create Qualifier to add Unique Qualifiers, page 2-4.

Example of Qualifiers page showing recently-created qualifiers

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Price Lists | **Modifier Lists**

☐ General Information
 ☒ Qualifiers
 ☐ Review

Create Discount List: Qualifiers

You can add qualifier conditions by clicking on "Create Qualifier". If you want to add a predefined set of qualifiers, click on "Append Group". [Cancel](#) [Back](#) Step 2 of 3 [Next](#) [Finish](#)

List Name **Disc_withQualifiers**

[Append Group](#) [Create Qualifier](#)

[Expand All](#) | [Collapse All](#)

[Qualifiers](#) >

Focus	Qualifiers	Context	Operator	Value From	Value To	Start Date	End Date	Update	Delete
	▼ Qualifier 1								
		Customer Intercompany Invoicing	Is	Vision Corporation					

Qualifier

Qualifiers are eligibility conditions that must be met before a price list or modifier can be applied. Qualifier Groups are pre-existing qualifier conditions that can be reused on price lists or modifiers.

[Cancel](#) [Back](#) Step 2 of 3 [Next](#) [Finish](#)

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Related Topics

- Updating a Qualifier (HTML Interface), page 2-7
- Deleting a Qualifier (HTML Interface), page 2-7

Updating a Qualifier (HTML Interface)

You can update a unique qualifier or common qualifier by adding, updating or deleting qualifier conditions. You can update the qualifier from the Create page or the Update mode of the modifiers or price lists.

Deleting a Qualifier (HTML Interface)

You can delete unique or common qualifier conditions from the qualifiers table by clicking Delete at the qualifier condition level. Alternately, you can delete all the conditions of a qualifier by clicking Delete at the qualifier level.

Note: If you delete a qualifier during an update flow (for example when updating a modifier), you need to click Apply to save the changes.

Appending a Qualifier Group (HTML Interface)

Qualifier groups consist of multiple qualifiers that can be associated with either price lists or modifiers. Qualifier groups can be appended to one or more price lists and modifiers. You can search by Group Name to find an existing Qualifier Group and append it to an existing qualifier.

Note: You can append but not create qualifier groups using the HTML interface. See *Creating a Qualifier Group*, page 2-8 for information about creating qualifier groups.

To append a qualifier group:

1. Navigate to the **Qualifiers: Append Group** page. In this page, you can attach existing Qualifier Group(s).

Qualifiers: Append Group page

The screenshot displays the 'Qualifiers: Append Group' page in the Oracle Advanced Pricing interface. The page includes a search bar with a 'Go' button, a table of qualifier groups, and navigation controls. The table has columns for 'Group Name' and 'Description'. The following table represents the data shown in the screenshot:

Select	Group Name	Description
<input type="checkbox"/>	HTML-1	HTML - 1
<input type="checkbox"/>	HTML-2	
<input type="checkbox"/>	KS-QG1	Test Qualifier Group -1
<input type="checkbox"/>	Atul	
<input type="checkbox"/>	TB	
<input type="checkbox"/>	Raj-QP1	
<input type="checkbox"/>	NS-Qualifier1	Qualifier Group
<input type="checkbox"/>	Q-90-1	
<input type="checkbox"/>	ABC-1	
<input type="checkbox"/>	ABC-2	

2. Select the Group Name(s) to be added, then click Apply to append the qualifier group to the modifier or price list.

Creating a Qualifier Group

In the Qualifier Group window, you can create a new qualifier group which consists of associated qualifiers. An example of a qualifier group could be:

- Customer must be in territory *WEST*
- Order Amount is between *\$2000* and *\$5000*
- Order Quantity must be greater than *10,000*

The Qualifier Group can use seeded qualifiers (source attributes) such as Customer Name and Order Amount or your own qualifier attributes. These qualifiers could come from one or more qualifier contexts.

Note: You can create qualifier groups in the Forms-based user interface only.

Example of Qualifier Group

Customer must be in territory WEST and Order Amount is between \$2000 and \$5000 or Order Type must be Standard.

Create a qualifier group, for example West1. The following table demonstrates field values to define the qualifier group West1.

Grouping Number	Context	Attribute	Operator	Value From	Value To
1	Geography	Territory	=	West	Null
1	Volume	Order Amount	Between	2000	5000
2	Order	Order Type	=	Standard	Null

To create a qualifier group:

1. Navigate to the Qualifier Group window.

Qualifier Group window

The screenshot shows the 'Qualifier Group' window. At the top, there are fields for 'Name' (containing 'Account Type : QP-Big Bucks') and 'Description' (containing 'Promotion based on Account Type : QP-Big Bucks'). Below these fields are two tabs: 'Qualifiers' and 'Dates'. The 'Qualifiers' tab is active, displaying a table with columns: 'Grouping No', 'Context', 'Attribute', 'Operator', 'Value From', 'Value To', and an empty column with brackets '[]'. The first row of the table is populated with: '1' in Grouping No, 'Customer' in Context, 'Account Type' in Attribute, '=' in Operator, '{QP-Big Bucks' in Value From, and empty cells in Value To and the bracket column. There are several empty rows below the first one. A vertical scrollbar is visible on the right side of the table.

2. Enter the qualifier group Name and a Description.

3. In the Qualifiers tab, enter a Grouping No. If you enter the same numeric value for more than one qualifier within a group, this creates an AND condition.
 - When entering different numeric values for multiple qualifiers within a group in the Grouping No. field, this creates an OR condition.
 - You must enter the EXACT values for Start Date and End date for EACH qualifier with a qualifier group when simulating an AND condition. If different dates are entered in either field, then the entire qualifier grouping will be ignored by the pricing engine

See: Using Qualifier Grouping Numbers, page 2-11 for more information on conditions set up with grouping numbers.

4. Select a qualifier Context.
5. Select a qualifying Attribute for the selected context.
6. In the Operator field select a value (=, BETWEEN, NOT =)

Note: The Between operator serves as Between condition when Value from and Value to field both contain a value.

- To simulate a Greater Than condition, enter a value in the Value From field, and leave Value To field blank.
 - To simulate a Less Than condition, enter a value in the Value To field, and leave Value From field blank.
7. Enter Value From/To. You can select values based on the value set definition of the qualifier attribute chosen.
- Some qualifiers use large value sets, for example, those based on all customers. To reduce the number of items that display in the Value From and Value To fields, you can:

- Enter search criteria in the field.
 - Click the list of values indicator.
- If you do not enter search criteria and click the list of values indicator, a warning advises you that you have not entered search criteria and that the search may take a long time:
- To view a reduced list of values, click No, enter search criteria, and click the list of values indicator.
 - To view the entire list of values display, click Yes.
 - If you do not want to see the list of values, click Cancel.

Set the profile option QP: Valueset Lookup Filter to avoid this message.

8. The field Value From Meaning displays additional details of the qualifier when you query a qualifier after saving it. For example, if the context is CUSTOMER and the attribute is Ship To, Value From displays the customer name and Value From Meaning displays the site use location for the customer. If the context/attribute combination has no additional details, Value From and Value From Meaning are identical.
9. In the Start Date field, enter an optional date that the qualifier becomes active

10. In the End Date field, enter an optional date that the qualifier becomes inactive
11. Save your work.

Using Qualifier Grouping Numbers

A qualifier consists of qualifier lines that define eligibility for a particular price, discount, promotion, or benefit. You can assign qualifier grouping numbers to qualifier lines to create AND and OR conditions that define how the pricing engine should evaluate the qualifier lines. For example, if the customer is Vision Corporation AND they pay by credit card then apply the 10% Discount modifier.

Note: Qualifier grouping numbers are not used in the HTML user interface. Instead, you use Common or Unique qualifiers to create grouping conditions. See *Creating Qualifiers (HTML Interface)*, page 2-4 for more information.

It is important to use qualifier grouping numbers correctly because it indicates to the pricing engine how to evaluate the qualifiers:

- Qualifiers with the same grouping number are evaluated as a boolean AND condition (an entity must meet all of the conditions to qualify).
- Qualifiers with different grouping numbers are evaluated as a boolean OR condition (an entity must meet one of the conditions to qualify).
- If -1 is used as a qualifier grouping number, the qualifier is ANDED to each qualifier group so you do not have to manually add it to each qualifier group.

AND Conditions

An AND condition means that all qualifier lines with the same Qualifier Grouping Number must evaluate as "true" before the pricing engine can select the associated modifier.

In the following example, both Line A and Line B, which have the same Qualifier Grouping Number, must be true to satisfy the AND condition. So, for example, if the customer is not Vision Operations but the credit rating is Excellent, then the modifier cannot be selected (assuming these are the only qualifiers for the modifier). The modifier will only be selected if the customer is Vision Operations (qualifier line A) AND their credit rating is Excellent (qualifier line B).

Qualifier Grouping Number	Qualifier Line	Qualifier Context and Attribute Values	Condition Created
1	Line A	Customer: Vision Operations	AND
1	Line B	Credit Rating: Excellent	AND

The next table shows a setup where a 10% discount on each order is offered only if a Preferred customer spends more than \$150:

Qualifier Group	Qualifier Attribute	Operator	Value From	Value To
1	Customer Class	=	Preferred	Null
1	Order Amount	Between	150	Null

OR Conditions

An OR condition is created by assigning a different qualifier grouping number (such as 1 and 2) to successive qualifier lines. The OR condition provides more flexibility because only one of the qualifier groups needs to be eligible to be selected. So in the following example, if either the customer is Vision Operations (qualifier line A) OR if the credit rating is Excellent (qualifier line B) then the modifier is eligible for selection. If both are true then the modifier is also selected:

Qualifier Grouping Number	Qualifier Line	Qualifier Context and Attribute Values	Condition Created
1	Line A	Customer: Vision Operations	OR
2	Line B	Credit Rating: Excellent	OR

In the following example, a 10% discount is given on each order placed by a preferred customer OR each order in which a customer spends more than \$150:

Qualifier Group	Qualifier Attribute	Operator	Value From	Value To
1	Customer Class	=	Preferred	Null
2	Order Amount	Between	150	Null

Using Combined AND/OR Conditions

The following table displays a grouping number setup using a combination of AND and OR conditions:

Qualifier Grouping Number	Qualifier Line	Condition Created
1	Line A	AND
1	Line B	AND
2	Line C	OR
3	Line D	OR

An AND condition is created for Lines A and B because they are both assigned the same qualifier grouping number (1). Qualifier lines assigned the same grouping number must both be evaluated as true statements before they can be selected.

An OR condition is created between qualifier lines with different grouping numbers. So if either Line A/B (both must be evaluated together) OR Line C OR Line D evaluate as true, then the pricing engine can select the modifier.

Using -1 as Qualifier Grouping Number

Typically, positive integers are used for qualifier grouping numbers such as 1, 2, or 3. However, if -1 is used as a qualifier grouping number, the qualifier is ANDED to each qualifier group saving you time from manually adding the AND qualifier.

Note: In the HTML user interface, the Common qualifier is used to create a common qualifier condition instead of the -1 grouping number. See *Creating Qualifiers (HTML Interface)*, page 2-4 for more information.

For example, to offer a discount in which a qualifier is mandatory for all qualifying conditions, the mandatory qualifier would be assigned the -1 qualifier group. The search engine processes -1 qualifying conditions first and only processes other qualifier groups if the pricing request qualifies for the -1 qualifier grouping number conditions.

For example, suppose you wanted to give a 10% discount on an order provided the:

- Customer is a "Preferred" customer.
- Customer (any customer) orders from a US web site and spends more than \$150.

However, to be eligible for the discount the customer must use a VISA credit card to pay. In the following example, the credit card type of Visa is assigned the -1 Qualifier Grouping Number to make it a mandatory qualifier before the modifier can be selected.

Using Qualifier Grouping Numbers across Qualifier Groups

When qualifiers are assigned to a qualifier groups, all the qualifiers in the qualifier group are attached to the modifier or price list. Before you attach multiple qualifier groups, you must indicate how the process should coordinate the grouping numbers. You select one of the following grouping number options:

- **Retain Grouping Numbers Across Qualifier Groups:** The grouping numbers of each attached qualifier remains as it appears in its qualifier group. In this case, the collection of attached qualifiers does not mirror the AND and OR combinations within each of the original qualifier groups.
- **Generate Unique Grouping Numbers Across Qualifier Groups:** The process maintains the AND and OR combinations within each of the original qualifier groups and then creates OR conditions between the groups. It attaches the first qualifier group with grouping numbers as is, then finds the highest grouping number used, increases it by one, and increases all of the grouping numbers of the second group by this number. It attaches subsequent groups in the same manner, using the highest grouping number used by the just previously attached group.
- **Both:** If you attach qualifiers using one option and then re-access the window and attach additional qualifiers using the other option, the second round qualifiers attach differently depending on the option. If the second round option is Retain Grouping Numbers Across Qualifier Groups, the process attaches those qualifiers among the already existing qualifiers. If the second round option is Generate Unique Grouping Numbers Across Qualifier Groups, the process begins attaching groups using grouping numbers incremented from the highest existing grouping number.

The following tables show examples of how the process sets the grouping numbers when you use each option. It presents the qualifiers grouped by each qualifier group:

Qualifier	Qualifier Group	Qualifier Grouping Number
Q1	G1	1
Q2	G1	2
Q3	G1	2
Q4	G1	3
Q5	G2	1
Q6	G2	1
Q7	G2	1
Q8	G3	1
Q9	G3	2
Q10	G3	3

The grouping numbers within group G1, for example, create the qualification that the entity qualifies if it meets condition Q1 OR (condition Q2 AND condition Q3) OR condition Q4.

The following table shows the attached qualifiers when you select the option Retain Grouping Numbers Across Qualifier Groups. It presents the qualifiers grouped by each qualifier grouping number to highlight that it does not retain the original qualifier group relationships:

Qualifier Group	Qualifier	Qualifier Grouping Number
G1	Q1	1
G2	Q5	1
G2	Q6	1
G2	Q7	1
G3	Q8	1
Null	Null	Null
G1	Q2	2
G1	Q3	2
G3	Q9	2
Null	Null	Null
G1	Q4	3
G3	Q10	3

The following table shows the attached qualifiers when you select the option Retain Grouping Numbers Across Qualifier Groups. It presents the qualifiers grouped by each qualifier group to highlight that it does retain the original qualifier group relationships:

Qualifier	Qualifier Group	Qualifier Grouping Number
Q1	G1	1
Q2	G1	2
Q3	G1	2
Q4	G1	3
Q5	G2	4 (3 + 1)
Q6	G2	4 (3 + 1)
Q7	G2	4 (3 + 1)
Q8	G3	5 (4 + 1)
Q9	G3	6 (4 + 2)
Q10	G3	7 (4 + 3)

Finding a Qualifier Group

The Find Qualifiers window lets you find a specific qualifier group or define a new qualifier groups.

To query for a qualifier group:

1. Navigate to the Find Qualifiers window.

Find Qualifiers window

The screenshot shows a window titled "Find Qualifiers". It contains two text input fields: "Name" (with a dropdown arrow) and "Description". At the bottom of the window, there are three buttons: "Clear", "New", and "Find".

2. Select the name of the qualifier group that you want to find.

3. Click Find to display the search results in the Qualifier Group window.

Modifying or Deleting Qualifier Groups

In the Qualifier window, you can update or delete a qualifier group or an associated qualifier.

1. Navigate to the Qualifiers window.
2. Locate the Qualifier Group to modify or delete.
3. Modify or delete the record.

Note: You must first delete all associated qualifiers within a group before you can delete the qualifier group.

4. Click Save.

Modifiers

Overview of Modifiers

Modifiers enable you to set up price adjustments (for example, discounts and surcharges), benefits (for example, free goods, coupons) and freight and special charges that can be applied immediately to pricing requests or accrues for later disbursement. Using modifiers, you can:

- Set up a modifier list with multiple modifier lines that define the terms of the price adjustment.
- Create eligibility rules for modifiers by assigning list and line level qualifiers.
- Define modifiers that are incompatible with other modifiers.
- Create exclusive modifiers.
- Create cascading modifiers.
- Accrue monetary and non-monetary benefits.
- Create monetary or usage limits that a customer can receive for a promotion, deal, or other modifier.
 - If you are using the multi-currency feature with price lists and modifiers, see: *Considerations for Modifiers Using Multi-Currency Conversion List as a Qualifier*, page 7-11.
 - You can only view or update a modifier in your pricing transaction entity. The profile QP: Pricing Transaction Entity must match the pricing transaction entity of the modifier. You can only view or update a modifier in your source system. The profile QP: Source System Code must match the source system of the modifier. Otherwise, the modifier is view-only.

Using the HTML User Interface with Modifier Lists and Modifiers

Oracle Advanced Pricing provides an HTML-based user interface (UI) that features guided steps, user-friendly pages, and shortcut links for setting up and maintaining modifiers, price lists, and qualifiers.

You can use this HTML format for many tasks that were previously available only using the Oracle Forms-based interface. Tasks that can be completed in HTML are identified with HTML Interface in the task title, for example, *Creating a Modifier List (HTML Interface)*.

Related Topics

Using Modifiers in the HTML User Interface, page 3-47

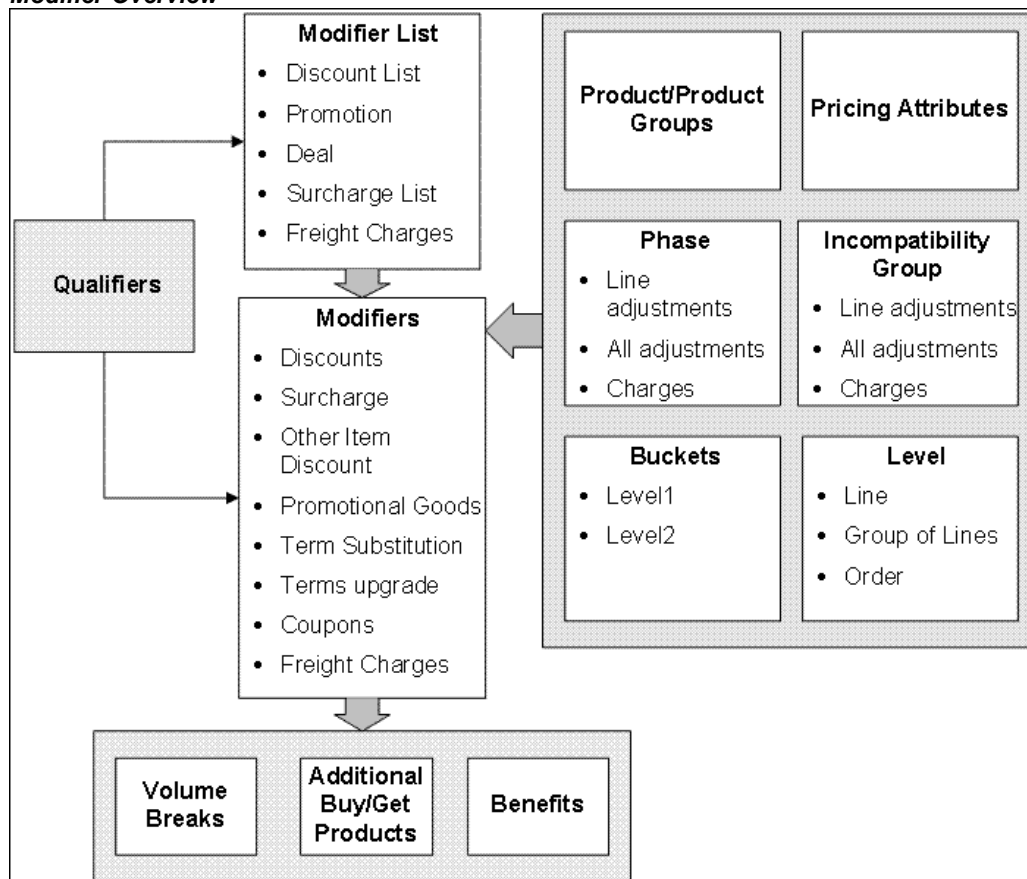
Modifier Concepts

Using modifiers, you can set up price adjustments, benefits, freight and special charges, and promotional limits to control spending or usage. You can define simple discounts and surcharges as well as more advanced deals and promotions. The following describes the main modifier concepts and related entities:

- Modifier lists contain one or more modifiers. Modifiers have list level and line level components. Each list level must have one or more lines associated with it.
- By defining qualifiers at the list and line levels, you define a customer's eligibility for the modifier.
- Control features that influence modifiers are products and product groups, pricing attributes, phases, incompatibility groups, levels, and buckets.
- The use of modifiers can result in volume breaks, additional buy/get products, and benefits.

The following diagram provides an overview of modifiers and related concepts such as modifiers, modifier lists and qualifiers.

Modifier Overview



Modifier Lists and Lines

Using modifier lists, you can create groupings of price adjustments, benefits, and freight and special charges that you offer and report together to meet various business needs. At the list level, you define criteria that is common to the modifier lines.

Create modifier lines for a modifier list to define the type of price adjustments, benefits or freight and special charges that the pricing engine applies to pricing requests.

Application Method (Adjustment Method)

The Application Method (or Adjustment Method in the HTML interface) determines how the modifier applies the price adjustment. You can select from the following application methods:

- **Percent:** Creates a percentage price adjustment on each unit based on the percentage entered in the Value field. For example, to apply a 10% discount, select Percent as the Application Method.
- **Amount:** Creates a fixed price adjustment on each unit using the amount entered in the Value field.
- **Lumpsum:** Creates a price adjustment for this lump sum amount on the entire line.
- **New price:** Overrides the selling price of this item and makes the new price defined in the Value field the new selling price. Creates a price adjustment for the difference in list price and the new price.

The following table shows examples of how the pricing engine uses the Application Method to calculate the extended selling price of an order line:

List Price	Item	Quantity Ordered	Application Method	Value	Price Adjustment	Extended Selling Price
10	Item A	200	Amount	5	5 per unit	1000
10	Item A	200	Percent	5	5% per unit	1900
10	Item A	200	New Price	5	5	1000
10	Item A	200	Lumpsum	5	5 off for the entire line	1995

The application method available for a modifier line depends on the Level selected for that modifier line: Order, Line, or Group of Lines.

The following tables show what Application Method is available for each level: Order Level, Line Level, or Group of Lines. The Formula column shows if you can use a formula for the value for the modifier:

Level	Modifier Type	Application Method available	Use with Formula?
Order Level	Discount	Percent	Yes
Order Level	Surcharge	Percent	Yes
Order Level	Freight/Special Charges	Lumpsum	Yes
Line Level	Discount	Percent, Amount, Newprice, or Lumpsum	Yes
Line Level	Surcharge	Percent, Amount, Newprice, or Lumpsum	Yes
Line Level	Freight/Special Charges	Percent, Amount, Lumpsum	Yes
Line Level	Other Item Discount (Get)	Percent, Amount, Newprice, or Lumpsum	No
Line Level	Price Break	Percent, Amount, Newprice, or Lumpsum	Yes
Line Level	Promotional Good (Get)	Percent, Amount, Newprice, or Lumpsum	No
Group of Lines Level	Discount	Percent, Amount, Newprice, or Lumpsum	Yes
Group of Lines Level	Surcharge	Percent, Amount, Newprice, or Lumpsum	Yes
Group of Lines Level	Other Item Discount (Get)	Percent, Amount, Newprice, or Lumpsum	No
Group of Lines Level	Price Break	Percent, Amount, Newprice, or Lumpsum	Yes
Group of Lines Level	Promotional Good (Get)	Percent, Amount, Newprice, or Lumpsum	No

Using Lumpsum Application Method with Group of Lines

When Lumpsum is selected as the Application Method for a modifier line, the pricing engine creates a price adjustment for the defined lumpsum amount. The lumpsum can be based on group quantity (sum of item quantities) or an item amount (a monetary amount).

Two examples are provided to compare how the lumpsum amount is calculated if either 1) Group Quantity or 2) Item Quantity is selected.

The following Discount List modifier is used in each example.

Level	Modifier Type (Line level)	Product Attribute	Product Attribute Value	Value	Application Method
Group of Lines	Discount	All Items	All	1000	Lumpsum

Lumpsum calculations based on Group Quantity

The following example demonstrates how the adjustment amount is calculated when the Lumpsum modifier is applied against the group quantity of an order:

Line	Item	Quantity	Price	Adjustment Amount calculated when Lumpsum Modifier Applied
1	AS54888	10	\$80	\$20 * 10 qty
2	AS54999	40	\$20	\$20 * 40 qty

The pricing engine calculates the adjustment amount as follows:

1. The pricing engine calculates the Group Quantity value which is the sum of all item quantity lines. Therefore, the Group value is 50 (10 + 40).

Group value for Line 1: 50

Group value for Line 2: 50

2. To obtain the adjusted amount, the Value (from the Value field of the modifier—in this case, 1000) is divided by the Group value (50):

- Line 1: $1000/50 = 20$
- Line 2: $1000/50 = 20$

The adjustment amount per quantity is \$20. The total adjusted amount for the entire order is \$1000: Line 1 is \$200, and Line 2 is \$800.

Lumpsum calculations based on Item Amount

The following example demonstrates how an adjustment for lumpsum modifier is calculated based on Item Amount (the monetary amount for each item). Suppose the Lumpsum modifier is applied against the following items on a sample sales order:

Line	Item	Quantity	Price	Adjustment Amount
1	AS54888	10	\$80	50
2	AS54999	40	\$20	12.5

The engine calculates the lumpsum based on Item Amount as follows: Value divided (/) by Group Value:

1. Group Value is calculated as follows:

Group Value = Sum of all lines' unit price * quantity/unit price per line:

Total Group Value= \$80*10 + \$20*40 = 1600

- Group Value for Line 1 = 1600/80 = 20
- Group Value for Line 2 = 1600/20 = 80

2. To obtain the adjusted amount per unit, the Value (from the Value field of the modifier--in this case, 1000) is divided by the Group value for each line:

- Line 1: 1000/20 = 50
- Line 2: 1000/80 = 12.5

Therefore, the adjustment amount for the first line is 50 and for the second line 80.

Using Modifiers with Negative Unit Selling Prices

A Discount or Surcharge modifier can be used to adjust the final unit selling price regardless of whether the item list price is a positive or negative value.

Example 1: Positive priced item

If a product is \$100 and the customer gets a 40% discount, then the customer gets a \$40 discount, which means the price would be \$60.

The following calculations are used to get this result:

List price * modifier % = line discount amount

List price - line discount amount = line price

Example 2: Negative priced item

If a product is <\$100> and the customer gets a 40% discount, then the customer gets a <\$40> discount, which results in a price of <\$60>.

Note: The brackets <> indicate a negative price.

The following calculations are used to get this result:

<list price> * modifier % = <line discount amount>

<list price> - <line discount amount> = <list price> + line discount amount = <line price>

Example 3: Surcharge with Negative-Priced Items

The following example shows the results when a Surcharge modifier is applied to a price list line with a negative price:

1. Create a simple modifier (ABC-MN) with type = Surcharge of 10%.
2. Create a price list line (ABC-N) with a value of <\$100>.
3. Enter a sales order with price list ABC-N and the item of the price list ABC-N.
4. Save the order.
5. The surcharge is applied, and the Unit Selling Price is <\$-110.00>.

Incompatibility Processing

When a customer is eligible for more than one modifier, you can use incompatibility processing to determine which of the modifiers the pricing engine should select and

apply to an order or order line. See *Changing Modifier Incompatibility*, page 3-86 for more information.

Buckets

When setting up a modifier, you can assign a modifier line to a particular bucket such as Bucket 1, 2, or 3 to define cascading price adjustments. This controls how discounts and other benefits are calculated.

Manual Modifiers

For manual modifiers, the modifier adjustment is not applied automatically. Rather, you must manually select the adjustment to be applied to an order line. The following modifier types can be manual:

- Discounts
- Freight and special charges
- Price Breaks
- Surcharges

Manual modifiers can also be used with price break lines. You can set manual modifiers at the order, line, and group of lines levels and make them overridable.

Using pricing buckets with manual modifiers:

Pricing buckets can be used with manual modifiers at the line or group of line level for the discounts, surcharges, freight and special charges, and price break modifiers. You can use this feature if the profile option QP: Allow Buckets for Manual Modifiers is set to Yes.

Once created, the manual modifier can be selected from the View Adjustments window in Order Management or the Price Adjustments window in Oracle Quoting. If a manual modifier is applied in an earlier bucket, then all subsequent adjustments will be recalculated. Alternately, when you overtype the selling price on the order line in Order Management, you can only apply manual adjustments in the null bucket. See the *Oracle Order Management User's Guide*, Pricing chapter and the *Oracle Quoting User's Guide* for more information on using manual modifiers.

Events

Events are points in the process flow when the calling application sends a pricing request to the pricing engine (similar to a workflow event). The information that the pricing engine returns, for example, base prices, price adjustments, promotions, or freight charges, depends on the pricing phases of the event.

For example, if you need to price sales orders at shipment, use the Reprice Line event and insert the Reprice Line workflow activity into the order process workflow to invoke the repricing. The pricing engine uses the price list and modifiers that are in effect at order entry to meet booking requirements such as credit check.

Accruals

You can create monetary and non-monetary accruals. For example, a customer accrues ten airline frequent flyer credits for each item they purchase. The pricing engine uses the accruals in price calculations and passes them to the calling application.

Accruals:

- Do not affect the selling price of an order line
- Do not appear as chargeable items on invoices
- Create an adjustment record in the database

You can:

- Assign expiration dates to accruals
- Mark accruals as redeemed
- Assign monetary accruals to buckets. Since accruals do not effect the selling price of an order line, the pricing engine does not include them in bucket calculations but uses bucket numbers to determine the price from which to calculate the accrual value.

Accruals using Buckets

The following table shows how accruals are calculated using buckets:

- The Price Adjustment column shows the value of each modifier.
- The Bucket Subtotal column shows the total value of all modifiers for the bucket.
- The Selling Price shows the price at the beginning of the calculation and after the application of each bucket subtotal.

The value Null in a cell means that there is no value for that cell; the value Null Bucket means that the modifier is grouped in the null bucket:

Bucket	Modifier	Price Adjustment	Bucket Subtotal	Selling Price
Null	Null	Null	Null	100.00
Null	Null	Null	Null	Null
1	Null	Null	(7.00)	93.00
2	Null	Null	(5.00)	88.00
3	Null	Null	(6.80)	81.20
Null Bucket	Null	Null	(15.00)	66.20
Null	Null	Null	Null	Null
1	10% accrual	(10.00)	Null	Null
1	5% accrual	(5.00)	Null	Null
2	10% accrual	(9.30)	Null	Null

Example of Non-Monetary Accruals

The following is an example of a setup for a non-monetary accrual.

If an Accrual Conversion Rate is used, then the Value = the monetary value of the points. The Accrual Value is calculated using the Benefit Quantity * Accrual Conversion Rate:

- $5 * 0.5 = 2.5$

Field	Value
Volume Type	Item Quantity
Break Type	Recurring
Operator	Between
UOM	EA
Value From	2
Value to	99999999
Application Method	Lumpsum
Accrual Value	2.5
Benefit Quantity	5
Benefit UOM	PN (for Points)
Accrual Conversion Rate	0.5

Qualifier Groups and Grouping Numbers

When qualifiers are assigned to a qualifier groups, all the qualifiers in the qualifier group are attached to the modifier. Before you attach multiple qualifier groups, you must indicate how the process should coordinate the grouping numbers. For more information on qualifier groups, see: Using Qualifier Grouping Numbers across Qualifier Groups, page 2-13.

Cross Order Volume

You can provide extra benefits to a customer after they place a certain amount of business with you. The cross order volume feature allows you to create modifiers that are qualified across an accumulation of orders and applied when a customer meets certain volume levels. It accumulates and sums order amount, item quantity, and item amount across the orders of each customer.

To use cross order volumes, set up periods in the following profile options:

- QP: Cross Order Volume Period 1
- QP: Cross Order Volume Period 2
- QP: Cross Order Volume Period 3

Cross Order Volume Profile Options

Assign a default value to each profile option in unit of measure Days. For example, set the profile options as follows:

- QP: Cross Order Volume Period 1: 30
- QP: Cross Order Volume Period 2: 60
- QP: Cross Order Volume Period 3: 90

Cross Order Volume Report

Run the Cross Order Volume Report to view the information in the cross order volume tables. The report displays the total order amount, total item amounts and total item quantities for each customer and period.

Note: The cross order volume loader only accumulates orders for items in the Cross Order Item Amount/Quantity Summary that have modifiers using the cross order volume attributes. Similarly the engine only gives total Cross Order summaries if a Cross Order qualifier has been used in a modifier. Therefore it necessary to run the cross order volume concurrent request after you setup any modifiers using either (a) a Cross Order Amount Qualifier that has not been used previously or (b) a Cross Order Item Amount/Quantity Pricing Attribute for an item that has not been used previously. This is to ensure that all items totals are accumulated and loaded into the cross order tables.

Creating a Modifier List

Using modifier lists, you can create groupings of price adjustments, benefits, and freight and special charges that you offer and report together to meet various business needs. At the list level, you define criteria such as the modifier currency that applies to the modifier and any modifier lines you add to the modifier list.

Note: Oracle Advanced Pricing also provides an HTML-based user interface for setting up and maintaining most modifier and modifier line types. See Using Modifiers in the HTML User Interface, page 3-47 for information on using the HTML user interface with modifiers.

You can create the following modifier list types:

- Deal
- Discount List
- Freight and Special charge List
- Promotion
- Surcharge List

To create a modifier list:

1. Navigate to the Advanced Pricing-Define Modifier window.

Note: If you cannot query or update the modifier after saving it or exiting, consult with your Pricing Administrator for access privileges. Your security privileges may not allow you to access this window.

Advanced Pricing - Define Modifier window

Advanced Pricing - Define Modifier

Main Advanced Other

Type **Discount List** Number **JS_DISC** ☐ Active
 Name **JS Discnt Mod** Version ☒ Automatic
 Currency **USD** Start Date -
 Description []

List Limits List Qualifiers

Modifiers Summary Discounts/Charges Promotion Upgrades Promotion Terms Coupons Price Breaks*

Modifier No	Level	Modifier Type	Start Date	End Date	Print On Invoice
174558	Line	Discount			<input checked="" type="checkbox"/>
174559	Line	Discount			<input checked="" type="checkbox"/>
174560	Order	Discount			<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Line Limits Exclude Pricing Attributes Line Qualifiers Define Details*

2. In the Main tab, select the a modifier Type.
3. Enter the modifier list Number.
4. Select or clear Active.

Note: The pricing engine evaluates the modifier only if the Active box is selected (inactive modifiers are not evaluated further by the pricing engine). The pricing engine performs more effectively if the Active box is cleared for expired modifiers. You can query inactive modifier lists.

5. Enter a Name to identify the modifier.

The modifier Name should be unique across all PTEs (Pricing Transaction Entities) otherwise an error occurs. For example, if a modifier named Corporate is created in the Order Management PTE, an error message displays if you create a Corporate modifier in the Purchasing PTE

6. Enter a Version if the modifier Type is Promotion or Deal.
7. A Global box displays if the Pricing Security Control Profile is set to ON. If the box is selected, the modifier list can be used by all operating units for pricing transactions. If cleared, the modifier's use is restricted to the operating unit of the user creating the modifier list.
8. Select or clear the Automatic box:
 - If selected, the Automatic box is also selected at the line level, and the pricing engine automatically applies the modifier.
 - If cleared, then the modifier is considered a manual modifier and the adjustment must be applied manually rather than automatically.

Note: If Automatic is enabled at the modifier list level, you can still manually apply line types of Discount, Surcharge, and Freight/Special Charges by clearing the Automatic box at the line level.

9. Choose one of the following:

- Select a Currency. If a currency is selected such as US dollars (USD), the sales order must match the modifier currency to determine pricing for the order. The modifier can then be used with a matching base currency or *to currency* (for a multi-currency price list).
- Optionally, select Optional Currency, page 3-48 to leave the Currency field in the modifier list blank. This option can be selected for modifiers where currency is not used as a criteria to select modifiers for the order.

10. Enter the Start and End Date range for the modifier.

Note: If you do not enter dates and check Active, the list is effective from the creation date.

11. Enter a Description for the modifier list. If the modifier list Type is Promotion or Deal, select the Advanced tab.

12. Save your work.

In the Advanced tab

13. If the modifier list Type is Promotion or Deal, select the Advanced tab.

Advanced Pricing - Define Modifier window: Advanced tab

Advanced Pricing - Define Modifier

Main Advanced Other

Parent No Parent Version ☐ Ask for

Date Type I Start date -

Date Type II Start date -

Modifiers Summary Discounts/Charges Promotion Upgrades Promotion Terms Coupons Price Breaks*

Modifier No	Level	Modifier Type	Charge Name	Include On Returns	Formula	Appl
174558	Line	Discount	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	Pen
174559	Line	Discount	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	Pen
174560	Order	Discount	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	Pen
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Line Limits Exclude Pricing Attributes Line Qualifiers Define Details*

Note: Modifier list types of Promotion and Deal have a parent-child relationship for reporting purposes. A Deal modifier list must be associated with a parent Promotion by providing the promotion name and version. Since this association is for reporting purposes, information that you define on the promotion is independent of and does not affect the information on the Deal modifier. You must have already created the Promotion modifier to

14. Enter the Parent Number and Parent Version to specify the promotion to which the deal is associated.
15. Select the Ask for box to create an Ask for modifier. This means the customer must specifically request that the modifier benefit be applied (for example, by providing a special discount number), otherwise it will not be applied. The Ask for box is only available for modifier list types of Deal and Promotion.

Note: If the pricing engine selects multiple modifiers to apply to an order line, Ask for promotions receive a higher preference than other modifiers.

16. Select Date Type I field to specify Order Date and Date Type II field to specify Requested Ship Date. Order Date and Requested Ship Date are passed by Order Management and cannot be changed. If you enter both dates, the sales order must meet both dates to be eligible for the modifier.
17. Save your work.

Note: The same results can be achieved by creating qualifiers for Order Date and Ship Date and attaching them to the modifier. These qualifiers are sourced and the user can override the mapping rules for these qualifiers.

18. Select the Other tab.

In the Other tab

This tab displays the following information including details about any related Blanket Sales Agreement:

Advanced Pricing - Define Modifier window: Other tab

Advanced Pricing - Define Modifier

Main Advanced Other

List Source Document Number List Source Code

Pricing Transaction Entity Source System Code

Blanket Sales Agreement

☐ Shareable

Modifiers Summary Discounts/Charges Promotion Upgrades Promotion Terms Coupons Price Breaks*

Modifier No	Level	Modifier Type	Charge Name	Include On Returns	Formula	Appl
174558	Line	Discount	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	Per
174559	Line	Discount	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	Per
174560	Order	Discount	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	Per
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Line Limits Exclude Pricing Attributes Line Qualifiers Define Details*

19. • List Source Document Number: This is the Blanket Number of the blanket sales agreement associated with the modifier.
- List Source Code: Displays the code associated with the modifier source. For example, BSO indicates Blanket Sales Order.
- Pricing Transaction Entity (PTE): Displays the pricing transaction entity associated with the modifier. The Pricing Transaction Entity value defaults from the PTE that created the modifier. This field cannot be updated.
- Source System Code: Displays the source system code of the modifier such as QP for pricing.

Note: The Pricing Transaction Entity and Source System fields display for all modifiers regardless of whether there is a related Blanket Sales Agreement.

- Shareable box: Indicates if the modifier is shared or not. If non-shareable (the default), then this modifier is specific to that blanket and cannot be used with other blanket sales agreements. If shared, the modifier is not exclusive to the blanket sales agreement and can be selected for use with other agreements.

Related Topics

Creating List Level Qualifiers, page 3-15

Overview of Promotional Limits, page 3-107

Creating List Level Qualifiers

You can create qualifiers to determine the eligibility of who can receive modifiers at the list level. If an order is not eligible for a modifier list, it is not eligible for that list's line level modifiers even if the lines have qualifiers for which the order is eligible.

To create list level qualifiers:

1. Navigate to the Advanced Pricing - Define Modifier window.

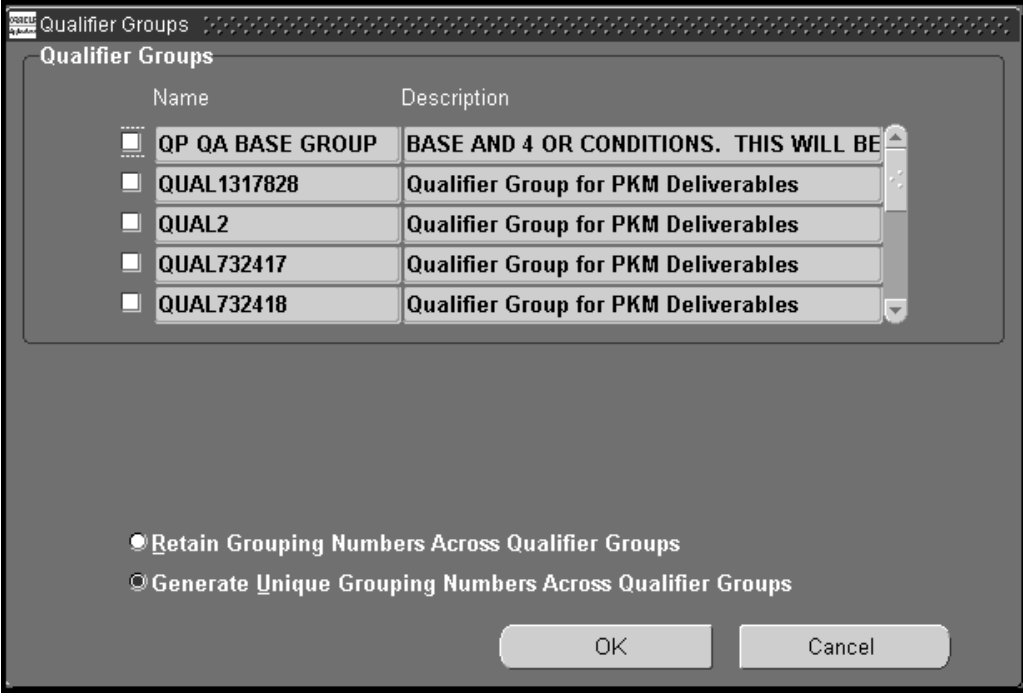
Advanced Pricing - Define Modifier: Modifiers Summary tab

The screenshot shows the 'Advanced Pricing - Define Modifier' window with the 'Modifiers Summary' tab selected. The window has three tabs: 'Main', 'Advanced', and 'Other'. The 'Main' tab is active, showing fields for 'Type' (Discount List), 'Name' (JS Discnt Mod), 'Currency' (USD), 'Number' (JS_DISC), 'Version', 'Start Date', 'Active' (checkbox), and 'Automatic' (checkbox). Below these fields are buttons for 'List Limits' and 'List Qualifiers'. The 'Modifiers Summary' tab is selected, showing a table with columns: 'Modifier No', 'Level', 'Modifier Type', 'Start Date', 'End Date', and 'Print On Invoice'. The table contains three rows of data: 174558 (Line, Discount), 174559 (Line, Discount), and 174560 (Order, Discount). Below the table are buttons for 'Line Limits', 'Exclude', 'Pricing Attributes', 'Line Qualifiers', and 'Define Details*'. The 'Print On Invoice' column has checkboxes for each row, all of which are checked.

Modifier No	Level	Modifier Type	Start Date	End Date	Print On Invoice
174558	Line	Discount			<input checked="" type="checkbox"/>
174559	Line	Discount			<input checked="" type="checkbox"/>
174560	Order	Discount			<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

2. In the Main tab, click List Qualifiers to display the Qualifier Groups window. If qualifiers are associated with the modifier list, then the Qualifier Groups window does not display.

Qualifier Groups window



The screenshot shows the 'Qualifier Groups' window. It has a title bar with the Oracle logo and the text 'Qualifier Groups'. Below the title bar is a section labeled 'Qualifier Groups' containing a table with two columns: 'Name' and 'Description'. The table lists five groups: 'QP QA BASE GROUP' (description: 'BASE AND 4 OR CONDITIONS. THIS WILL BE'), 'QUAL1317828' (description: 'Qualifier Group for PKM Deliverables'), 'QUAL2' (description: 'Qualifier Group for PKM Deliverables'), 'QUAL732417' (description: 'Qualifier Group for PKM Deliverables'), and 'QUAL732418' (description: 'Qualifier Group for PKM Deliverables'). Each row has a checkbox to its left. Below the table are two radio buttons: 'Retain Grouping Numbers Across Qualifier Groups' (selected) and 'Generate Unique Grouping Numbers Across Qualifier Groups'. At the bottom right are 'OK' and 'Cancel' buttons.

	Name	Description
<input type="checkbox"/>	QP QA BASE GROUP	BASE AND 4 OR CONDITIONS. THIS WILL BE
<input type="checkbox"/>	QUAL1317828	Qualifier Group for PKM Deliverables
<input type="checkbox"/>	QUAL2	Qualifier Group for PKM Deliverables
<input type="checkbox"/>	QUAL732417	Qualifier Group for PKM Deliverables
<input type="checkbox"/>	QUAL732418	Qualifier Group for PKM Deliverables

☒ Retain Grouping Numbers Across Qualifier Groups
☐ Generate Unique Grouping Numbers Across Qualifier Groups

OK Cancel

3. If you do not want to add qualifiers from qualifier groups, click Cancel. Alternately, to add qualifiers from qualifier groups, select one or more qualifier groups that you want to attach.
4. Select one of the grouping options (Retain Grouping Numbers Across Qualifier Groups or Generate Unique Grouping Numbers Across Qualifier Groups). For more information, see: Using Qualifier Grouping Numbers across Qualifier Groups, page 2-13.
5. Click OK to display the Qualifier window. In this window the qualifiers associated with the qualifier groups are listed.

QUALIFIER - Header Level Qualifiers



The screenshot shows the 'QUALIFIER - Header Level Qualifiers' window. It has a title bar with the Oracle logo and the text 'QUALIFIER - Header Level Qualifiers'. Below the title bar is a table with five columns: 'Group', 'Grouping Number', 'Qualifier Context', 'Qualifier Attribute', and 'Precedence'. The table contains four rows of data: (1, Customer, Customer Name, 260), (1, Terms, Payment Terms, 630), (1, Order, Customer PO, 440), and (1, Customer, Customer Item, 230). Below the table are 'Cancel', 'OK', and 'Copy Group' buttons.

Group	Grouping Number	Qualifier Context	Qualifier Attribute	Precedence
	1	Customer	Customer Name	260
	1	Terms	Payment Terms	630
	1	Order	Customer PO	440
	1	Customer	Customer Item	230

Cancel OK Copy Group

6. You can add, change, and delete individual qualifiers and change the grouping numbers or dates. If you have attached qualifier groups, verify that the grouping numbers in the window display the correct combination of AND and OR conditions.
7. Enter the Grouping Number. Qualifiers with the same grouping number generate an AND condition and qualifiers with different grouping numbers generate an OR condition. If -1 is used as a qualifier grouping number, the qualifier is ANDED to each qualifier group so you do not have to manually add it to each qualifier group. For more information, see: *Using Qualifier Grouping*, page 2-11Numbers.
8. Enter the Qualifier Context.
9. Enter the Qualifier Attribute.

Note: After you save a qualifier with Qualifier Context of Modifier List and Qualifier Attribute of Coupon Number, you cannot modify or delete it. Since the pricing engine creates coupons (and a qualifier for each coupon) these coupon qualifiers are not subject to manual changes and deletions.

10. Enter the Operator, Value From, and Value To.
11. The Value From Meaning field provides additional details about the selected qualifier. For example, if the qualifier context is CUSTOMER and the attribute is Ship To, Value From displays the customer name and Value From Meaning displays the site use location for the customer. If the context/attribute combination has no additional details, Value From and Value From Meaning are identical.
12. Click Copy Groups to add qualifiers from other qualifier groups, and enter Start and End dates of the qualifier. For more information on Qualifiers, see: *Oracle Advanced Pricing User's Guide*, Qualifier Groups.
13. View and, if necessary, adjust the precedence numbers that default from the qualifier definition.

The pricing engine uses the Precedence to resolve incompatibility. If multiple modifiers are eligible within the same phase and incompatibility level, the modifier with the lowest precedence is applied.

14. Click OK and save your work.

Note: The start and end dates of the list qualifiers must be within the start and end date of the modifier list.

Creating Modifier Lines

You can add modifier lines to a modifier list to define the type of price adjustments, benefits or freight and special charges that the pricing engine applies to pricing requests.

Note: Oracle Advanced Pricing also provides an HTML-based user interface (UI) for setting up and maintaining most modifier and modifier line types. See *Using Modifiers in the HTML UI*, page 3-47 for more information.

For each list type that you define, you can select certain modifier line types. The following modifier types can be selected at the modifier line level:

- **Coupon Issue:** Issues a coupon on one order that the customer can redeem for a price adjustment or benefit on a later order.
- **Discount:** Creates a negative price adjustment such as a 10% discount.
- **Freight/Special Charge:** Applies a freight charge.
- **Item Upgrade:** Replaces a specific item ordered with another item for the same price.
- **Other Item Discount:** Gives a price adjustment or benefit to a specified item on an order when the customer orders one or more other items on the same order.
- **Price Break Header:** Applies a variable discount or surcharge price adjustment to a pricing request based meeting the condition of a break type. You can use both point and range type breaks.
- **Promotional Goods:** Adds a new item with a price adjustment or benefit when the customer orders one or more other items on the same order.
- **Surcharge:** Creates a positive price adjustment.
- **Term Substitution:** Replaces freight charges, shipping charges, and payment terms with typically more favorable charges.

The following table details the modifier line types that can be used with a selected modifier list type. The modifier *line* types are listed in the left column, and the modifier *list* types are listed in the top row. A *Yes* in a row indicates that you can use the modifier line type with a particular list type, a *No* indicates that you cannot:

Modifier Line Type (listed in column below)	Deal	Discount List	F&S charge List	Promotion	Surcharge List
Coupon Issue	Yes	No	No	Yes	No
Discount	Yes	Yes	No	Yes	No
Freight/ Special Charge	No	No	Yes	No	No
Item Upgrade	Yes	No	No	Yes	No
Other Item Discount	Yes	No	No	Yes	No
Price Break Header	Yes	Yes	No	Yes	Yes
Promotional Goods	Yes	No	No	Yes	No
Surcharge	Yes	Yes	No	Yes	Yes
Terms Substitution	Yes	No	No	Yes	No

Once you have created and saved a modifier line, you cannot edit or change the Product Attribute Value (or primary buy item) for the line. To change the Product Attribute Value for a line, you should end date the existing modifier and create a new modifier.

Note: You cannot create promotional limits for the modifier line if:

- The Modifier line type is Other Item Discount, Promotional Goods, Coupon Issue, Item Upgrade, or Term Substitution.
- The Automatic box is cleared (if the modifier line is manually applied).
- The Override box is enabled.

This following section describes general setup information common to most modifier line types. For information on setting up specific modifier line types, see the following:

- To create a Discount/Surcharge modifier line:, page 3-24
- To create a Freight/Special Charge modifier line:, page 3-25
- To create an Item Upgrade modifier line:, page 3-27
- To create a Terms Substitution modifier line:, page 3-27
- To create a Coupon Issue modifier line:, page 3-28
- To create a Promotional Goods and Other Item Discount modifier line:, page 3-29
- To create a Price Break Header modifier line:, page 3-32

To create general modifier line information:

1. Navigate to the Advanced Pricing - Define Modifier window.

Advanced Pricing - Define Modifier window

Advanced Pricing - Define Modifier

Main Advanced Other

Type **Discount List** Number **JS_DISC** ☐ Active
Name **JS Discnt Mod** Version ☒ Automatic
Currency **USD** Start Date -
Description [☐]

List Limits List Qualifiers

Modifiers Summary Discounts/Charges Promotion Upgrades Promotion Terms Coupons Price Breaks*

Modifier No	Level	Modifier Type	Start Date	End Date	Print On Invoice
174558	Line	Discount			<input checked="" type="checkbox"/>
174559	Line	Discount			<input checked="" type="checkbox"/>
174560	Order	Discount			<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Line Limits Exclude Pricing Attributes Line Qualifiers Define Details*

2. In the Modifiers Summary tab, Modifier No field, a default modifier number identifies the modifier line. You can change this value; however, the Modifier No for each modifier line must be unique within the modifier list.
3. Select the Level that the modifier is applied:
 - Order: If the line is eligible to receive the modifier, the pricing engine applies the modifier at the order level.
 - Line: If the line is eligible to receive the modifier, the pricing engine applies the modifier at the line level.
 - Group of Lines: If the pricing request is eligible to receive the modifier, the pricing engine considers the item quantity or item amount consumed for a group of order lines. The following table displays the available modifier types and volume types that can be selected for a modifier line when Group of Lines is selected:

Level	Modifier Types that can be created with Group of Lines	Volume Types that can be used with Group of Lines
Group of Lines	Discount, Item Upgrade, Other Item Discount, Price Break Header, Promotional Good, Surcharge, Terms Substitution,	Item Quantity, Item Amount

4. You can select a formula to calculate a price adjustment. For example, to calculate a discount using a formula, attach a formula to a discount line.

Formulas are available only with the following modifier list types: Discount, Surcharge, or Freight and Special charge List.
5. Select a modifier type. If you plan to set up promotional limits for the modifier, confirm using the following table that promotional limits can be applied to the modifier line type:

Modifier Type	Can Promotional Limits be applied?
Coupon Issue	No
Discount	Yes
Item Upgrade	No
Other Item Discount	No
Price Break Header	Yes
Promotional Goods	No
Surcharge	Yes
Term Substitution	No

6. Enter the Start/End Dates for the modifier line.

Note: The start and end date for the modifier line must be between the start and end date on the modifier list. The pricing engine

confirms that the dates for the modifier line are valid so that the modifier line can be applied.

Print On Invoice is reserved for future use.

7. Select or clear the Automatic box:

- Select Automatic to have the pricing engine automatically apply this modifier. The Automatic box for each modifier line also becomes selected.
- Clear the Automatic box if you want the modifier to be manually applied. See Manual Modifiers, page 3-7 for more information on manual modifiers.

For Promotional Limits: If you are using promotional limits with the modifier, the Automatic box must be selected and remain selected at both the modifier header and line level. Limits do not function with a modifier that is applied manually.

Note: In the Advanced Pricing - Define Modifier window, you can clear the Automatic box for the following line level modifiers: Discount, Surcharge, and Freight/Special Charges.

8. Select Override to enable the modifier adjusted price to be manually overridden. If not selected then the modifier adjusted price cannot be overridden.
9. Enter the Pricing Phase for this modifier line. Only valid phases for this modifier level appear in the list of values.

Note: If you attach a phase with a PRICE event to the following promotional modifier types - Promotional Goods/Other Item Discount/Item Upgrade/Terms Substitution/Coupon Issue - and save the modifier line, then the following error message displays:

The pricing phase for this modifier is attached to a PRICE event and cannot be used for this modifier type. Please change the pricing phase or remove a PRICE event for this phase from the Event Phases form.

10. Select an Incompatibility Group. See Changing Modifier Incompatibility, page 3-86 for more information about incompatibility groups.
11. Enter a Bucket value.

Note: The Proration Type field is reserved for future use.

12. Enter a numeric Comparison Value. The pricing engine uses this value to compare modifier types of Item Upgrade, Other Item Discount, and Term Substitution to resolve incompatibility and determine which modifier(s) to apply. This is used when the pricing phase incompatibility resolution is Best Price.

Note: Best Price processing cannot be used for the following order-level modifier list types (Discount, Surcharge, Freight and Special charge).

13. Select a Product Attribute value such as Item Number, Item Category, or All Items. Use All Items to define a modifier that applies to all items in your product hierarchy.
14. Select a Product Attribute Value. If you select ALL_ITEMS for Product Attribute, the Product Attribute Value is ALL.

If you do not enter values for Product Attribute and Product Attribute Value, the Pricing Engine applies the modifier line as if you selected ALL_ITEMS for Product Attribute.
15. The Precedence value will default based on the Product Attribute Value. This value can be updated.

If two or more modifiers tie based on precedence processing, then the engine resolves using best price processing without going below the established precedence.
16. Enter a Volume Type such as Item Quantity and Item Amount to instruct the pricing engine which item attribute to use when qualifying for a modifier.
17. Select an Operator value such as = or BETWEEN; for example, item quantity = 5 or item quantity BETWEEN 5 and 20. If you select Recurring for Break Type, you must select BETWEEN.
18. Select the unit of measure (UOM) for the item or item category. If the line type is Promotional Goods, Other Item Discount, Item Upgrade and Volume Type is Item Quantity, then the UOM is mandatory.

Note: For Promotional Limits:

- If no Product UOM is defined for the Modifier Line, line limits with basis of Item Quantity will not get created.
 - If no Benefit UOM is defined for a Modifier Line, line limits with basis as Accrual Units will not get created.
 - If no Benefit or Product UOM is defined, neither Item Quantity or Accrual Units displays in the Basis list of values (LOV) to prevent line limits from being created.
19. To create greater than and less than conditions, leave From Value and To Value blank, as follows:
 - From Value = 5 and To Value blank creates the condition Value > 5
 - From Value blank and To Value = 100 creates the condition Value < 100
 - From Value = 5 and To Value = 100 creates the condition Value >= 5 and value <= 100
 20. Select either Point or Recurring as the Break Type.
 - Example: If RECURRING is selected with the following values, for example, where Value from =1 and Value to =10, then for every 1 quantity, the discount is applied up to a quantity of 10. So if a sales order is created with order quantity 10, the (lumpsum) discount is applied for all the 10 quantities.

The Break Type is optional for the following modifier types:

- Discount
- Surcharge

- Freight Charge
- Promotional Goods
- Coupon Issue

Example

The following table provides an example of a setup for a point break.

Field	Value
Break Type	Point
Modifier Line Type	Discount
Product Attribute	Item
Product Attribute Value	Item A
Volume Type	Item Quantity
Operator	Between
UOM	Cases
Value From	100
Application Method	Amount
Value	2

The pricing engine interprets this point setup as follows:

- If you order 100 cases of item A, you get a 2 currency unit discount.
- If you order 200 cases of item A, you get a 2 currency unit discount.

The following table details an example setup for a recurring price break:

Field	Value
Break Type	Recurring
Modifier Line Type	Discount
Product Attribute	Item
Product Attribute Value	Item A
Volume Type	Item Quantity
Operator	Between
UOM	Cases
Value From	100
Application Method	Percent
Value	2

The pricing engine interprets this recurring setup as order 100 cases of item A and get a 2 currency unit discount. If you order 200 cases of item A you receive a 4 currency unit discount.

21. Select Point or Range to calculate the volume break.

To create a Discount modifier line:

Creates a negative price adjustment such as a 10% discount.

Notes

In the Discount/Charges tab

Advanced Pricing - Define Modifier

Main Advanced Other

Type **Discount List** Number **JS_DISC** ☒ Active
 Name **JS Discount List** Version **2** ☒ Automatic
 Currency **USD** Start Date **-** **-**
 Description **Discount for selected items.** []

List Limits List Qualifiers

Modifiers Summary Discounts/Charges Promotion Upgrades Promotion Terms Coupons Price Breaks*

Modifier No	Level	Modifier Type	Charge Name	Include On Returns	Formula	Application
128004	Line	Discount		<input type="checkbox"/>		Amount
128005	Line	Discount		<input type="checkbox"/>		Amount
128006	Order	Discount		<input type="checkbox"/>		Percent
				<input type="checkbox"/>		
				<input type="checkbox"/>		

Line Limits Exclude Pricing Attributes Line Qualifiers Define Details*

Record: 1/1 ... <OSC>

- **Modifier Type:** Select Discount.
- **Include on Returns check box:** Selected by default so that the freight charges are also included with returns. Alternately, if Include on Returns is deselected then pricing will not apply the charge automatically on the return line.
- **Formula:** Optionally, select a formula to calculate a discount, surcharge, or freight charge (a formula can be used with modifier line types of Discount, Surcharge or Price Break Header). If the formula includes a Modifier Value (MV) in its equation, then this value is derived from the Value field in the Discounts/Charges tab. If a formula does not have a Modifier Value component, then the Value field is not used during the formula calculation when the final discount is returned.

For example, consider a formula with the following equation:

- List Price * Modifier Value (MV) = Final Discount

Formula	List Price (LP)	Modifier Value (MV)	Final Discount
LP *MV=Final Discount	20	3	60

At Order Entry, when the modifier is selected and the formula LP *MV is applied, the list price of the item on the order (LP) is multiplied by the value that is entered in the modifier's Value field. In this case, the value is 3. So the final discount is 20*3=60.

A formula without a Modifier Value component can be attached to a modifier even if a value is entered on the modifier line. In this case, the formula takes precedence and the modifier value is not used. Instead, the number returned by the formula is considered as a final discount.

- **Value:** Select an Application Method and a numeric value. The Application Method selected determines how the value is applied. For example, if the application value is Percent, then the value such as 10 is applied as a percent.
- **Accrual:** Complete the remaining fields to enter an accrual:
 1. **Accrue:** Select Accrue check box to enter accrual information.
 2. **Benefit Qty and Benefit UOM:** Enter Benefit Qty and Benefit UOM of the benefit to be accrued. Use the benefit columns to define non-monetary accruals.
 3. **Expiration Date:** Defines when the accrued transactions expire.
 4. **Expiration Period and Period Type:** The pricing engine calculates the expiration date. The Expiration Period begins when item begins to accrue.

Note: These fields are unavailable if you enter an Expiration Date.
 5. **Accrual Redemption Rate:** You can enter or modify the redemption rate after the Accrue box is selected.
 6. **Accrual Conversion Rate:** Defines the conversion of the Benefit UOM to the primary currency. For example, if one air mile is 0.50 currency units, the accrual conversion rate is 0.50.

To create a Freight/Special Charge modifier line

1. Enter the following information in the Modifiers Summary tab:
 - Level: Use Line or Order
 - Modifier Type: Use Freight/Special Charge
 - Phase: If Level is Line: use Line Charge or Line Manual Charge. If level is Order, enter the Charge Name.
 - Bucket

Advanced Pricing - Define Modifier window: Discounts/Charges tab

Advanced Pricing - Define Modifier

Main Advanced Other

Type Freight and Special charge Li Number 124 ☒ Active
 Name Freight and Special Charges Version ☐ Automatic
 Currency USD Start Date -
 Description []

List Limits List Qualifiers

Modifiers Summary Discounts/Charges Promotion Upgrades Promotion Terms Coupons Price Breaks*

Modifier No	Level	Modifier Type	Charge Name	Include On Returns	Formula	Application
128008	Order	Freight/Special	Transportation	<input checked="" type="checkbox"/>	F-Factor-1	
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		

Line Limits Exclude Pricing Attributes Line Qualifiers Define Details*

2. In the Discounts/Charges tab, select the Charge Name such as Freight Costs.
3. The Include on Returns box is selected by default so that the freight charges are also included with returns. Alternately, if Include on Returns is deselected then pricing will not apply the charge automatically on the return line.
4. Enter a Formula name to use a formula to calculate a discount, surcharge, or freight charge.
5. Select an Application Method (Adjustment Method), page 3-3 to instruct the pricing engine how to apply this modifier.

Note: For Order Level modifier lines of type Discount and Surcharge, only Percent can be selected as the Application Method. For Freight/Special Charge modifiers, Lumpsum must be selected as the Application Method.

6. Enter a Value unless you are using a formula.

Note: For Freight/Special Charges, if an Incompatibility Group is not selected for the modifier line, then the pricing engine will use BEST PRICE incompatibility processing instead of Precedence. Precedence is defined as the Incompatibility Resolve Code in the Event Phases window.

7. Save your work.

To create an Item Upgrade modifier:

In the Promotion Upgrades tab, you can define an Upgrade Item that replaces a specific item ordered for the same price. Note that the upgrade item is not given on the booked order during the book event, but will be applied on a subsequent order.

Advanced Pricing - Define Modifier window: Promotion Upgrades tab

Advanced Pricing - Define Modifier

Main Advanced Other

Type **Promotion** Number **js0001** ☐ Active
Name **js_Promo Mod** Version ☐ Automatic
Currency **USD** Start Date -
Description []

List Limits List Qualifiers

Modifiers Summary Discounts/Charges **Promotion Upgrades** Promotion Terms Coupons Price Breaks*

Modifier No	Level	Modifier Type	Upgrade Item
174562	Line	Item Upgrade	

Line Limits Exclude Pricing Attributes Line Qualifiers Define Details*

Notes

- **Modifier Type:** Item Upgrade

Note: Before entering the upgrade item, relate the item and its upgrade item in Oracle Inventory. Select Promotional Upgrade for Relationship Type. When you complete this relationship, the related item appears in the list of values for this field.

When the pricing engine applies the qualifying item on the order line, it changes the original item to the upgraded item and retains the price of the original item.

To create a Term Substitution modifier line:

Create a Term Substitution modifier line in the Promotion Terms tab to replace freight charges, shipping charges, and payment terms with typically more favorable charges.

Advanced Pricing - Define Modifier window: Promotion Terms tab

Advanced Pricing - Define Modifier

Main Advanced Other

Type **Promotion** Number **jsprmo1** ☐ Active
 Name **Js-Promoterm** Version ☐ Automatic
 Currency **USD** Start Date -
 Description []

List Limits List Qualifiers

Modifiers Summary Discounts/Charges Promotion Upgrades **Promotion Terms** Coupons Price Breaks*

Modifier No	Level	Modifier Type	Terms Attribute	Terms Value
174564	Line	Term Substitut	Payment Terms	30 Net

Line Limits Exclude Pricing Attributes Line Qualifiers Define Details*

Notes

In the Promotion Terms tab

- **Modifier Type:** Term Substitution
- **Terms Attribute and Terms Value:** Enter the new terms.

The pricing engine substitutes the terms on the order or order line with the terms that you specify.

To create a Coupon Issue modifier line:

The following steps outline how to create a coupon issue modifier:

1. Define the Coupon Benefit

1. In the Modifiers Summary tab, create a modifier line to define the *benefit* that is issued when the coupon is redeemed. For example, a 10% discount or \$6 off the order. Select a modifier line type of Discount or Promotional Goods to define the benefit.

The modifier number (Modifier No) that defaults for the modifier line is used to generate a unique number series for the coupon; the coupon number is passed to the calling application. The customer must quote the coupon number to redeem the coupon in the calling application.

When the customer redeems the coupon, the pricing engine validates the coupon number against the qualifier and also validates the qualifiers for the discount or promotional goods benefit.

Note: Typically, the coupon is issued for an order, and the actual discount line (the benefit the coupon applies) is applied to a subsequent order when the coupon is redeemed. However, if

you set up a line level qualifier for the discount line with the following settings then both the discount line and coupon line can be applied to the same order :

- Grouping Number = -1
- Grouping Number = Any of the Coupon Modifier Numbers

If you are intentionally including a line level qualifier on the discount line which is of grouping no. not equal to any of the coupon modifier numbers and is not equal to -1, it means that you actually want the discount to be applied independent of coupon redemption.

2. Define the Coupon Issue Details

In a second modifier line, you define the coupon details such as the coupon name, its expiration date, and other details. This is the *Coupon Issue* line. Then you link the benefit line to the coupon issue line.

1. Select Coupon Issue as the Modifier Type.
2. Enter a Benefit Quantity and Benefit UOM.
3. Enter a Redemption Rate to specify the percentage probability that customers might redeem this coupon.
4. Enter Coupon Conversion Rate to specify the conversion of the Benefit UOM to the primary currency. For example, if one air mile is 0.50 currency units, the coupon conversion rate is 0.50.
5. Enter the Expiration Date which is the last date that the customer can redeem the coupon.

Alternately, if you enter values for the Expiration Start Date, Expiration Period, and Expiration Period Type, the pricing engine automatically calculates the Expiration Date. For example, for the following coupon setup, the pricing engine calculates an expiration date of 20 July:

- Expiration Period Start Date: 20 April
- Expiration Period: 3
- Expiration Period Type: Month

Note: If you do not enter Expiration Period Start Date, the pricing engine will use the date that the calling application issued the coupon.

6. Enter the Coupon Modifier Number to link the Coupon Issue modifier line to the benefit modifier line.

To create a Promotional Goods/Other Item Discount modifier lines:

To reward a customer who orders one or more specified items on the same order, you can create a Promotional Goods modifier line to add a new item to an order and provide a price adjustment or benefit for the item. The reward item does not need to be originally on the order. Even if the item is on the order, the pricing engine creates a new line for the item.

You must specify a quantity and can use any unit of measure (UOM) set up on your system.

1. When you create or duplicate a modifier, you can change the Primary buy item, Additional buy items, and Get items. However, once the modifier is saved, the additional buy or get items cannot be changed or deleted. You can still add additional buy and get items.
2. Deleting and reapplying a Promotional Goods modifier line: If you apply a modifier line of type Promotional Goods to an order, then delete the modifier line, you cannot reapply the deleted Promotional Goods modifier line.

Examples of Promotional Goods modifiers

You can create as many *must buy* items as desired and as many get items as required. Here are some sample scenarios of must buy and get promotional modifiers.

- Customer must buy A to get B
- Customer must buy A and B to get C
- Customer must buy A and B and C to get D

However, you cannot create a combination of *must buy* products or *get* products where the promotional goods modifier must evaluate multiple items. For example, the customer receives 20 units free of the following products or a combination of products A, B, C if the customer buys at least 20 units from the specified products (X or Y) or a combination.

Instead you must specify explicit must buy and get amounts: For example, the customer must buy 10 of Product X **and** 10 of Product Y to get 20 free units of Product A.

Note: If you are using Promotional Good (PRG) type of Modifier Line with Multi-Currency, see: Using Promotional Good type of Modifier Line, page 7-12.

Other Item Discount

When the customer orders one or more other specified items (the buy items) on the same order, you can create an Other Item Discount modifier line that provides a price adjustment or benefit to another item (the get item) on the order. The Other Item Discount modifier must be applied at the Group of Lines level.

Notes

- **Level:** Promotional Goods modifiers are not supported at the Order level.
- **Phase:**
 - For Other Item Discounts, the phase defaults to All Lines Adjustment. If you create a new phase to use for this modifier type, set Phase to All Lines Adjustment.
 - For Promotional Goods (PRG) modifiers: To have the PRG modifier applied in conjunction with an order-level modifier (assuming the order-level modifier has been created), then select All Lines Adjustment as the Pricing Phase for the PRG modifier. This enables both the PRG modifier and the order-level modifier to be applied in conjunction to an order.

However, if Pricing Phase = List Line Adjustment, it will prevent an order level modifier from being applied in conjunction with the PRG modifier. Only the eligible PRG modifier will be applied.

- Click Define Details to display the Define Modifier Details window.

Define Modifier Details window

Define Modifier Details - for Modifier List GA-DISCOUNT

Modifier Details

Modifier Type: **Other Item Discount** Modifier No:

Product Level: **Item Number** Value: **QP-COPY-144**

Volume Type: Pricing Attr Value:

Products

Additional Buy Products

Group No	Product Attribute	Product Value	Pricing Attribute	Operator

Get

Product Attribute	Product Value	UOM	Get Quantity	Get UOM	Get Price
Item Number	QP-OFFSUP-147	Ea	1	Ea	147

- **Products tab - Additional Buy Products region:**

In this region, define any additional products that the customer must buy in addition to the original product defined in the Modifiers Summary tab.

- **Group No:** Defines the AND or OR condition of the buy side of the modifier. To join lines with AND, use the same group number on each line; to join lines with OR, use a different group number on each line
- **Pricing Attribute:** This is a volume pricing attribute; use either item quantity or item amount.
- **Get region:**

Define the get product that the customer receives. It is recommended that you do not define a Get Line for a Promotional Goods using price list lines with the following setups:

- Those with dynamic formulas.
- Those with arithmetic operator of Block Price or Percent price.

The Get Product Attribute defaults to Item Number.

Note: Once you save the Promotional Goods or Other Item Discount line, you cannot update the Primary Buy, Additional Buy, or Get Product attributes.

If you manually delete or change a free good line for an order/quote line on the order, for example, change the number of free good items from 3 to 2 on the Sales Order pad, for subsequent repricing calls, the overridden manual entry is retained.

For example, suppose a customer buys Item A and gets two of Item B free. If you change the number of free goods that the customer gets from one to two on the Sales Order pad, on subsequent repricing, the manually overwritten amount is retained so the customer gets the one free good.

To create a Price Break Header modifier line:

Create a Price Break Header modifier line to apply a variable discount or surcharge price adjustment to a pricing request based on the price breaks..

1. Complete the following entries:
 - Level: Group of Lines or Line.
 - Break Type:
 1. Point: The pricing engine charges each unit of volume at the price of the break within which the total falls.
 2. Range: The pricing engine charges each unit of volume at the price of the break within which it falls.
 - Product Attribute and Product Attribute Value
 - UOM
 - Volume Type
2. Select the Price Breaks tab.

Advanced Pricing - Define Modifier window: Price Breaks tab

Advanced Pricing - Define Modifier

Main Advanced Other

Type **Promotion** Number **JS1** ☒ Active
 Name **Promotion Summer** Version ☒ Automatic
 Currency **USD** Start Date -
 Description

List Limits List Qualifiers

Modifiers Summary Discounts/Charges Promotion Upgrades Promotion Terms Coupons Price Breaks*

Modifier No	Level	Modifier Type	type	Accumulation Attribute	Net Amount Calculation	Accrue
161558	Line	Price Break Header	...			<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

Line Limits Exclude Pricing Attributes Line Qualifiers Define Details*

3. Select an Adjustment Type:
4. Select an Accumulation Attribute if you are setting up range price breaks that accumulate across orders. This option is available for Range breaks only. See Using Accumulated Range Breaks, page 3-36 for more information.

Using Net Amount Calculation with Price Breaks

5. In the Net Amount Calculation field, select either For matching products or For all matching attributes to calculate the net amount. The Net Amount Calculation field enables you to calculate the selling price based on the net amount (bucketed amount).

Also, if Line is selected as the modifier line level then you can only select "For All Matching Attributes" from the Net Amount Calculation field.

- **For matching products:** When this option is selected, the order lines that match the modifier Product criteria (such as the Item Number Item Category) are selected and grouped. The sum of the amounts from these order lines is selected and then used as the group amount for the net amount calculations.
- **For all matching attributes:** When this option is selected, the order lines that match **all the criteria** (not just the Product criteria) defined in the price break modifier are selected and grouped. The sum of the amounts from these order lines are then used as the group amount for the net amount calculations.

Note: To use net amount, the following must also be selected:

- Level: Line or Group of Lines level (Group of Lines must be selected to use the For matching products option from the Net Amount Calculation field.)
- Modifier Type for the modifier line must be Price Break Header and related price breaks must be set up

- Automatic check box for the modifier line must be selected.
- Override check box cannot be selected
- Volume Type: Amount

Promotional Goods and Net Amount Calculation

Promotional goods amounts will not be included in the net amount calculation. For example, if an order line gets a promotional good (buy A, get B free or discounted), the new line will not contribute to any net amount calculation of any modifier in the order.

Example when For matching products is selected

For example, suppose you create a price break modifier line with the following setup (simplified example):

- Product: Item Number = AS54888
- Net Amount Calculation: For matching products selected
- Pricing Attribute: Red

If this modifier is applied to the following order, then **all** order lines that match the product defined in the price break modifier line (for example, Item Number = AS54888) are grouped together for the net amount calculations (regardless of other qualifying criteria):

Order Line	Product	Pricing Attribute
1	Item Number: AS54888	Red
2	Item Number: AS54888	Blue
3	Item Number: AS54888	Red

The summation of item amount is based on the item amount for all 3 lines, but the discount is going to be applied on lines 1 and 3:

- Lines used for Net Amount Calculations: All order lines with Product Item Number = AS54888 are grouped together.
- Lines that get discount: The modifier adjustment (such as a discount) are only applied to Lines 1 and 3 because they match the modifier's remaining qualifying criteria (pricing attribute must be Red.)

Example of Net Amount Calculation

The following table displays a modifier setup that will calculate Net Amount for an order using a break range type of Point:

Modifier Setup	Bucket	Discount	Break Ranges
Line 1: Discount A	1	40%	n/a
Line 2: Discount B	1	30%	n/a
Line 3: Price Break Header (PBH) C	2	5%	\$0-1000
-	-	7%	\$1001-2000
-	-	10%	\$2001-9999

Suppose this modifier were applied to the following order:

Order Item	List price	Order quantity
AS54888	\$2000 each (per unit)	2

If the modifier were applied to this order, the Net Amount selling price would be calculated as follows:

1. First Discount A (40%) is applied resulting in the unit adjusted amount of \$800.
2. Then Discount B (30%) is applied resulting in a unit adjusted amount of \$600.
3. The unit selling price at the end of Bucket 1 is $\$2000 - (\$800 + \$600) = \600 . This becomes the unit selling price for the next bucket.
4. For PBH C to apply: the Net Amount Calculation is $(\$2000 * 2) - (800 * 2) - (600 * 2) = \1200 . This qualifies for the second break of C, which is 7%.
5. PBH C applied: the unit adjustment amount is $7\% * 600 = \$42$. This will be applied to the unit selling price of the previous bucket.
So the final unit selling price will be $\$600 - 42 = \558 .
6. To use the price break to calculate an accrual, select Accrue.

Note: The Accrual box can only be used if Discount is selected as the Adjustment Type.

 1. If using accruals, enter an Expiration Date to specify when the accrued transactions expire.
 2. Enter Expiration Start Date, Expiration Period and Period Type. The pricing engine calculates expiration date. Expiration period begins when the item begins to accrue.
The Rebate Transaction Type defaults to Credit Memo and is reserved for future use.
7. Click Define Details to display the Define Modifier Details window.

Define Modifier Details window

The screenshot shows the 'Define Modifier Details' window for modifier 'JS1'. The 'Modifier Details' section includes fields for Modifier Type (Price Break Header), Product Level (Item Number), Volume Type (Item Quantity), Modifier No (161558), Value (AS54888), and Pricing Attr Value. The 'Price Breaks' section shows a table with columns: Value from, Value To, Formula, Application Method, Value, and Benefit Quant. The first two rows are populated with values 10, 20, 21, 30, and Application Method of Percent.

Value from	Value To	Formula	Application Method	Value	Benefit Quant
10	20		Percent	10	
21	30		Percent	20	

8. The Break Line Type, Break Type, and Net Amount Calculation values default from the modifier line.
9. Enter the Value From/To. To use a formula to calculate a discount, select the Formula.
10. Select an Application Method (Adjustment Method), page 3-3.
11. Enter a Value for the Application Method. The Value is related to the Application Method selected. For example, if the Application Method is Percent, and 10 is the Value, the discount (if applied as a discount) is 10-percent.
12. For non-monetary accruals, enter the Accrual Conversion Rate to specify the conversion of Benefit UOM to the modifier primary currency. For example, if 1 air mile is 0.50 currency units, the Accrual Conversion Rate is 0.5.
13. If applicable, enter the Benefit Quantity and Benefit UOM (unit of measure).
14. Save your work.

Using Accumulated Range Breaks

Setting up modifiers with accumulated range breaks provides additional flexibility to existing price break processing. Using accumulated range breaks, you can set up range price breaks that accumulate within and across orders based on some attribute value (for example, quantity) that is accumulated from previous orders or order lines.

The pricing engine uses the accumulation value as the starting point of the break calculation. Advanced Pricing does not store these accumulated values. The value is passed by the calling application in the engine request or the engine dynamically sources the attribute from a customer API.

Values can be accumulated across different orders or within an order. For example, suppose a customer places the following two orders:

- Order A: Orders 2 of Item Shampoo
- Order B: Orders 3 of Item Shampoo

Under regular range price break processing, each order would be evaluated independently of each other. However, with accumulated range price breaks, the accumulated quantity value from Order A is the starting point for evaluating the range break for Order B.

The value of the accumulation attribute is sourced from the pricing request when evaluating accumulated range price breaks for modifiers. Customers are responsible for accumulating and maintaining the values from prior transactions in any manner of their choice. This value is the starting point for range price breaks in subsequent transactions that are passed to the pricing engine.

Setting the Profile Option and Volume Attribute

To begin using the accumulation attribute feature, the profile QP: Accumulation Attributes Enabled must be set to Yes. Typically, this is set by the System Administrator. The profile option also enables the Accumulation Attribute field in the Price Breaks tab on the Define Modifier window.

Do the following steps to set up this feature (no seeded attributes are provided for this feature).

1. You can create two types of accumulation volume attributes in Attribute Management to use this feature.
 - Use the mapping method of Attribute Mapping to source the accumulation value from the pricing request.
 - Use the new attribute mapping method Runtime_Sourced to enable the pricing engine to source the attribute and accumulation values from a custom API. A new package has been created, QP_RUNTIME_SOURCE, containing a specification for the custom API. Customers are required to write a corresponding body to this package. See the *Advanced Pricing Implementation Manual* for more information.
2. Set profile QP: Accumulation Attributes Enabled to Yes at Site and/or Application level.
3. Define a modifier line with the following setup:
 - Line type: Price Break Header
 - Break type: RANGE
 - Select Accumulation Attribute from the list of values.

The profile enables the Accumulation Attribute field in modifier lines. Price break details are defined in Define Details.

Using Accumulated Range Break across Orders

When using accumulated range breaks, the accumulation total must be passed as the starting point for each pricing request. For example, suppose the following discount has been set up to give a discount across orders.

Volume Attribute From	Volume Attribute To	Adjustment Amount
1	5	5%
6	10	10%
11	15	15%

If a customer then places three separate orders for 5 items each, then the adjustment amount is calculated as follows:

Order No.	Quantity	Accumulated Value	Adjustment Amount
1	5	0	5%
2	5	5	10%
3	5	10	15%

The adjustment calculations for the preceding example are as follows:

For the first order, the accumulated value is 0. A discount of 5% is given because the order quantity of 5 satisfies the first quantity range break of 1-5.

For the second order, the accumulated value passed to the pricing engine is 5. (5 from Order 1). A discount of 10% is given, because the break is evaluated starting with quantity 6 and satisfies the range 6-10.

Finally, for the third order, the accumulated value passed to the pricing engine is 10. A discount of 15% is given, because the break is evaluated starting with quantity 11 and satisfies the range 11-15.

Using Accumulated Range Breaks within an Order

Accumulated range price breaks can be used to evaluate the volume of order lines within the same order.

For example, if a customer orders 3 lines of the same item that is eligible for a discount, then each line is priced based on the accumulated value of the previous qualifying line for the same product.

Suppose a price break modifier is set up with the following volume ranges and adjustment amount:

Volume Attribute From	Volume Attribute To	Adjustment Amount (Percent)
1	5	5%
6	10	10%
11	15	15%

When this discount is applied, the accumulated values and adjustment amounts are calculated as follows:

Line No.	Quantity	Accumulated Value	Adjustment Amount
4.1	3	0	5%
4.2	6	3	8.33%
4.3	4	9	13.75%

The accumulation value and discounts are evaluated as follows:

- The first line is given a discount of 5% because an accumulation value of 0 is passed and the order quantity of 3 satisfies the range 1-5.
- Line 4.2 is evaluated with starting at the accumulated value of 3. Two of the ordered quantity 6 fall within the range of 1-5 and 4 fall within the range 6-10 resulting in an 8.33% adjustment.
- Line 4.3 is evaluated with a starting point of $(3+6) = 9$ passed by the calling application and an order quantity of 4. One of quantity 4 falls within range 6-10 and 3 fall within the range of 11-15 resulting in a 13.75% adjustment.

Attaching Pricing Attributes to Modifier Lines

Use this process to attach attributes to the items and item categories that you define in modifier lines. When the pricing engine determines eligibility for a modifier, it validates the pricing attributes along with the item number or item category.

Note: Pricing attributes apply only to the primary items that you define in the Modifiers Summary tab. They do not apply to items that you define for additional buy items and get items.

To attach pricing attributes to modifier lines:

1. Navigate to the Advanced Pricing - Define Modifier window.
2. Select the Modifiers Summary tab and select a modifier.
3. Click Pricing Attribute to display the More Pricing Attributes window.

More Pricing Attributes window

Pricing Context	Pricing Attribute	Operator
Pricing Attribute	Administration Cost	=

4. Enter a Pricing Context.
5. Enter a Pricing Attribute.
6. Enter an operator value such as = or BETWEEN.
7. Enter Value From and Value To.
8. Click OK and save your work.

Excluding Items from a Modifier

Use this process to exclude items from a modifier. When the pricing engine evaluates order lines, if an order line contains an item or item category that is defined as an excluded item or item category, then these lines are considered ineligible and will not be evaluated for the modifier.

The following example shows the difference between a modifier defined without an Excluded Item and one defined with an Excluded Item:

Modifier without Excluded Item

The following example shows the effects of applying a modifier when no excluded item is defined for the modifier. The modifier, Modifier_Shampoo1, is set up with the following criteria:

- Level: Group of Lines
- Item Category: Shampoo
- Quantity: > 100 quantity

To be eligible for the modifier, the item category of the ordered item(s) must be Shampoo and the total item quantity of the eligible order lines must be greater than 100.

Suppose a customer then places the following order for two shampoo items and a conditioner item:

Order Line ID	Qty	Item	Category
1	100	Shampoo1	Shampoo
2	20	Shampoo2	Shampoo
3	30	Conditioner1	Conditioner

The modifier will be applied because the item total for the eligible group of lines is 120 (100 + 20).

Modifier with Excluded Item

The following modifier, Modifier_Shampoo2, has been set up, and the item Shampoo1 is defined as the Excluded Item:

- Level: Group of Lines, Item Category: Shampoo
- Quantity: > 100 quantity
- Excluded Item: Shampoo1

Suppose a customer then places the following order for two shampoo items and a conditioner item as in the previous order:

Order Line ID	Item	Quantity (Qty)	Category
1	Shampoo1	100	Shampoo
2	Shampoo2	20	Shampoo
3	Conditioner1	30	Conditioner

To be eligible for this modifier, the item category of the ordered items must be Shampoo and the item quantity of the eligible order lines must be greater than 100. However, the item Shampoo1, which is defined as an excluded item for this modifier, will not be evaluated. The group of lines from the order are evaluated against the modifier requirements as follows:

- Order Line 1: Rejected because it contains the Excluded (Item Shampoo1).
- Order Line 2: Accepted because the Category is Shampoo.
- Order Line 3: Rejected because Category is not Shampoo.

Then, the modifier evaluates the total quantity of the eligible order lines. If the total item quantity is greater than 100, then the modifier is applied. Since the quantity of the eligible lines is 20 (Order Line 2) the modifier will not be applied.

To add exclude items to a modifier:

1. Navigate to the Advanced Pricing - Define Modifier window (Summary tab) and select a modifier. You cannot add Excluded items if the modifier level is Order.
2. Click Exclude to display the Exclude Items window.

Exclude Items window

Product Attribute	Product Value	Exclude
Item Category	MISC.MISC	<input checked="" type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

3. Enter a Product Attribute and Product Value to be excluded.
4. Select Exclude and click OK.
5. Save your work.

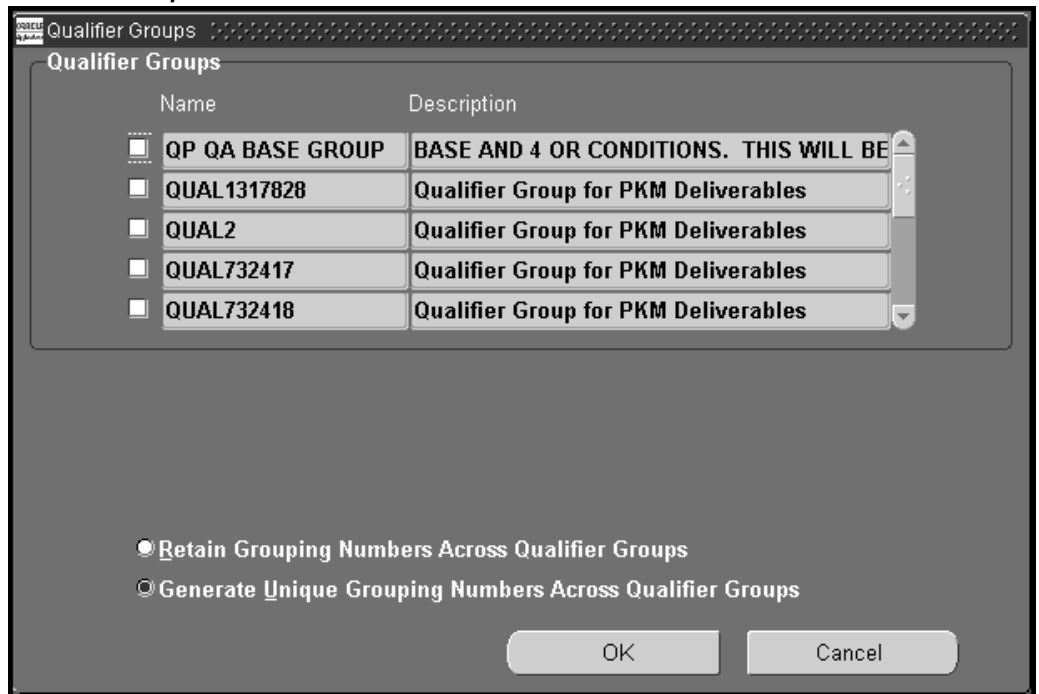
Creating Line Level Qualifiers

Use this process to create qualifiers for modifiers at the line level. The pricing engine evaluates qualifiers to determine eligibility for line level modifiers. If an order is not eligible for a list level modifier, the order lines may be eligible for list line level modifiers if the order lines have qualifiers for which the order is eligible.

When creating qualifiers, consider secondary price lists that may need to be included to be considered for the modifier. For example, if a customer qualifies for a discount from Price List A but the effectivity of the item drives the engine to the secondary price list (Price List B), the customer does not receive the discount unless the qualifier also includes Price List B.

1. Navigate to the Advanced Pricing - Define Modifier window.
2. Choose the Modifiers Summary tab and select a modifier line.
3. Click Line Qualifiers.

Qualifier Groups window



4. If this modifier list has no qualifiers, the Qualifier Groups window appears. Do one of the following:
 - To add qualifiers from qualifier groups:
 1. Select the qualifier group(s).
 2. Select a grouping option: Retain Grouping Numbers Across Qualifier Groups or Generate Unique Grouping Numbers Across Qualifier Groups. For more information on qualifier groups, see: Using Qualifier Grouping , page 2-13Numbers across Qualifier Groups.
 3. Click OK to display the Qualifier - Line Level Qualifiers window. The qualifier and qualifier conditions from the selected qualifier group(s) display in this window.

The Group name (from the related Qualifier Group) displays in the Group column. Verify that the Grouping Number that defaults from the qualifier group creates the AND and OR conditions that you want.
 - To add qualifiers and skip the Qualifier Groups window, click OK and go to step 5.
5. In the Qualifier - Line Level Qualifiers window, you can add, change, and delete qualifiers, change the grouping numbers, and change the dates.

Qualifier - Line Level Qualifiers

Group	Grouping Number	Qualifier Context	Qualifier Attribute	Precedence
	1	Customer	Customer Class	310
General Techno	3	Customer	Customer Name	260
NS-Qualifier2	5	Customer	Customer Name	260
NS-Qualifier2	6	Order	Order Type	470

Buttons: Cancel, OK, Copy Group

6. If you are entering a new qualifier, enter a Grouping Number. Qualifiers with the same grouping number generate an AND condition while qualifiers with different grouping numbers generate an OR condition. For more information on grouping numbers, see: Using Qualifier Grouping Numbers, page 2-11.
7. Enter the Qualifier Context.
8. Enter the Qualifier Attribute.

Note: After you save a qualifier with Qualifier Context of Modifier List and Qualifier Attribute of Coupon Number, you cannot modify or delete it. Since the pricing engine creates coupons (and a qualifier for each coupon) these coupon qualifiers are not subject to manual changes and deletions.

View the Precedence numbers that default from the qualifier definition. The pricing engine uses precedence for resolving incompatibility. If multiple modifiers are eligible within the same phase and incompatibility level, the modifier with the lowest precedence is applied.

9. Enter the Operator, Value From, and Value To (if applicable).
10. The Value From Meaning field provides additional details about the selected qualifier. For example, if the qualifier context is CUSTOMER and the attribute is Ship To, the Value From field displays the customer name and the Value From Meaning field displays the site-use location for the customer. If the context/attribute combination has no additional details, Value From and Value From Meaning are identical.
11. Click Copy Group to add qualifiers from other qualifier groups.
12. Click OK.
13. Save your work.

Note: The start and end dates of the list qualifiers must be within the start and end date of the modifier list.

Copying a Modifier List

You can create a new modifier by copying an existing one. The following modifier information is copied from the original modifier to the new one:

- Modifier lines
- Pricing attributes: Price breaks, other item discounts, coupons, promotional goods, setups and lines.
- Qualifiers

When you copy a modifier, you can enter a unique number and name for the new modifier and either update or keep the effective dates for the modifier list and lines. The combination of modifier name, number, and version must be unique across modifier lists. Although it is possible to copy an existing modifier name, you must enter a unique number for the new modifier.

Promotional limits attached to the original modifier are not copied. The promotional limits must be created again for the new modifier.

Note: If you do not see the modifier list that you are trying to copy, it is possible that you may not have access privileges to it. You must have at least View Only security privilege to copy a modifier list. Consult your Pricing Administrator.

To copy a modifier list:

1. Navigate to the Copy Modifiers window.

Copy Modifiers window

The screenshot shows a window titled "Copy Modifiers" with a standard Windows-style title bar. The window is divided into two main sections: "Copy From" and "Copy To".

Copy From section:

- Number:** A text field containing "0611" with a dropdown arrow on the right.
- Currency:** A dropdown menu showing "USD".
- Name:** A text field containing "0611vl".
- Retain Effective Dates:** A checkbox that is checked.

Copy To section:

- Number:** A text field containing "Mod A".
- Name:** A text field containing "Mod A".
- Effective Dates:** Two text fields separated by a hyphen, both currently empty.

Bottom section:

- Request ID:** A text field.
- Submit:** A button.

2. In the Copy From region:

- In the Number field, select the modifier list to be copied.
- The currency and name displays for the selected modifier.

Select Retain Effective Dates to copy the effective dates from the original to the new modifier.

Note: Selecting the Retain Effective Dates check box retains the effective dates only for the modifier lines not for the modifier list. If you select Retain Effective Dates, then the effective dates from the original modifier lines are copied to the new modifier lines. If you do not select this option, you can add effective dates to the new modifier lines once they are created

3. In the Copy To region:

- In the Number field, enter a name for the new modifier.
- Optionally, enter a description in the Name field and the effective dates for the modifier.

4. Click Submit to copy the modifier. A Request ID number displays so you can track your copy request. Select View > Requests and search by your Request ID number to view your request status.

Important: In Advanced Pricing, the copied modifier list is always inactive so you must select the Active box to make the modifier active.

5. Search for the new modifier in the Find Modifier Lists window.

6. Select the modifier, then select Active to activate the modifier.

Copying a Modifier Line

You can quickly copy an existing modifier line to a new line record in the Advanced Pricing - Define Modifier window. The following information is copied to the new modifier line:

- All the contents of the modifier summary and all other tabs.
- All the Exclude Products attached to this modifier line.
- All the Pricing Attributes attached to this modifier line.
- All the Line Qualifiers attached to this modifier line.
- All the Line Details (additional and get products, price break lines) attached to this modifier line.

All fields that are copied can be updated except for the Level and Modifier type fields. The Product Attribute and Product Value fields can be updated even after clicking Define Details. However, once the new modifier line is saved, these fields cannot be updated.

Note: Duplicate Modifiers: Basic Pricing provides a profile option, QP: Allow Duplicate Modifiers, that can be set to Yes or No to control if duplicate modifiers are permitted. This functionality is

for Basic Pricing only. In Advanced Pricing, this profile option does is non-functional and therefore, does not restrict your ability to copy a modifier line. See the Oracle Advanced Pricing Implementation Manual, Profiles Option chapter for more information about this profile option.

To copy a modifier line:

1. Display the modifier in the Advanced Pricing - Define Modifier window.
2. Select the modifier line to be copied, and click the New icon in the toolbar to create a new blank line beneath the original line.
3. Choose Edit > Duplicate > Record Above to duplicate the original line. Alternately, select the SHIFT + F6 keys.
4. Once the line is duplicated, you can modify or save it.
5. Save your work.

Using Modifiers in the HTML User Interface

Oracle Advanced Pricing provides an HTML-based user interface (UI) that features guided steps, user-friendly pages, and shortcut links for setting up and maintaining modifiers, price lists, and qualifiers.

Note: It is important to familiarize yourself with certain navigational flow considerations in the HTML user interface when updating, changing, saving, or deleting data for price lists, modifiers, qualifiers, and their related lines. See Navigation flow , page 1-6 for more information.

You can use the HTML UI to complete many of the pricing tasks that you previously completed using the Oracle Forms-based UI such as:

- Searching for modifier lists and modifier lines.
- Creating modifier lists for the following modifier types only: Deal, Discount List, Promotion, or Surcharge List.

Note: You must use Oracle Forms-based user interface to create Freight and Special charge List.

- Creating the following modifier line types:
 - Discount
 - Surcharge
 - Price Break Header
 - Promotional Goods

Note: You must use the Oracle Forms-based UI to create all other modifier line types.

- Updating a modifier.

Oracle Advanced Pricing still provides the Oracle Forms-based interface for features and tasks currently unavailable in the HTML format such as creating qualifier groups.

Note: Pricing security can affect the View and Maintain features associated with the Update and Details icons in the HTML user interface. See *Oracle Advanced Pricing Implementation Manual*, Pricing Security, for more information.

Creating a Modifier List (HTML Interface)

A Modifier List contains general information that applies to all modifier lines created for the list. You can use modifier lists and lines to adjust net prices either up or down through modifier actions such as discounting, adding surcharges, charging for shipping, or adjusting price based on promotional pricing.

In the HTML user interface, you can create the following modifier list types.

- Deal
- Discount List
- Promotion
- Surcharge list

Note: You must use the Oracle Forms-based user interface to create a Freight and Special charge List.

For each modifier list type, you can create modifier lines that define the price adjustment or benefit to be applied to the pricing requests. See *Creating Modifier Lines (HTML Interface)* to view which modifier line types are supported for each modifier list.

Creating a modifier list and modifier lines involves the following steps:

1. Entering general modifier list information.
2. Creating qualifiers that define eligibility rules for the modifier list. For example, the customer must be a Gold class customer to receive the adjustments and benefit for the modifier list.
3. Reviewing and then saving the modifier list.
4. Adding modifier lines to the modifier list to define the type and amount of price adjustment or benefit offered.

Note: Pricing security can affect the View and Maintain features associated with the Update and Details icons in the HTML user interface. See *Pricing Security (HTML Interface)*, page 1-3 for more information.

Modifier List Concepts:

Currency

The pricing engine applies modifiers to sales orders of the same currency. If a specific currency is selected such as USD (US dollars), then the modifier list can only be used with a price list with a matching base currency or *to currency* (for a multi-currency price list).

Optional Currency

Select Optional Currency if currency is not used as a criteria to select modifiers for the order (this leaves the Currency field in the modifier list blank). When Optional Currency is selected, the modifier can be used with any price list regardless of its currency. Such modifiers could be used with both single price lists that are set up in a single currency, or with multi-currency enabled price lists.

Note: Multi-currency enabled price lists are set up in a base currency and associated with a currency conversion list containing the base currency and other currencies with conversion criteria.

Selecting optional currency can provide the following advantages to your business:

- Enables your business to reduce the number of modifiers required to support sales orders in all currencies for which you do business. For example, Optional Currency could be selected for modifiers that are set up with the application method of Percent, since these modifiers could be applied to any sales order regardless of the currency (since no currency conversion is required).
- Reduces the cost of setup and maintenance of modifiers.
- Reduces cost of data storage.

Note: Although Optional Currency is applicable to all modifier types and application methods, it may not be appropriate for all types of modifiers since NO currency conversion is done with such modifiers. You must determine if it suits your business requirements and in what situations.

Pricing For Global Use

The Pricing For Global Use box identifies if this modifier list and lines are available to all operating units or a specific operating unit.

- If selected, then the modifier list and lines are available for all operating units.
- If cleared, then the modifier list and lines are specific to the operating unit of the person that created the modifier. The pricing engine will only consider this modifier if the order has the same operating unit.

The Pricing For Global Use box displays only if the profile QP: Security Control is turned on. Once the profile is turned on, all newly created modifier lists will have the global box selected as a default. You can clear the box only if you are assigned Maintain security access privilege.

Customer Must Ask For List

If the Customer Must Ask For List box is selected, the customer must specifically request that the modifier benefit be applied (for example, by providing a special discount number), otherwise it will not be applied. This box is only available for modifier list types of Deal and Promotion.

Note: If the pricing engine selects multiple modifiers to apply to an order line, the modifiers for a Customer Must Ask For List receive a higher preference than other modifiers.

To create a modifier list:

1. Navigate to the **Modifier Lists** page.

Modifier Lists page

The screenshot shows the Oracle Advanced Pricing interface. At the top, there's a navigation bar with links: Diagnostics, Home, Logout, Preferences, Help. Below this is a sub-navigation bar with 'Price Lists' and 'Modifier Lists'. The main heading is 'Modifier Lists'. There's a search section with a 'Search' label, a dropdown for 'List Name', a text input field, and a 'Go' button. Below the search is a 'Create List' section with a dropdown set to 'Discount List' and a 'Go' button. A table with columns: Name, Number, Type, Start Date, End Date, Active Status, Update, and Details is shown. The table contains one row with the text 'No search conducted.' At the bottom, there's a footer with navigation links: Home, Lists, Diagnostics, Home, Logout, Preferences, Help. Copyright text: Copyright 2000-2004 Oracle Corporation. All rights reserved. About this Page. Privacy Statement.

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Price Lists | **Modifier Lists**

Modifier Lists

Search

Search

Create List

Name	Number	Type	Start Date	End Date	Active Status	Update	Details
No search conducted.							

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2. Select the type of modifier to be created:
 - Deal
 - Discount List
 - Promotion
 - Surcharge list
3. Click Go to display the **Create [Modifier Type] General Information** page.

Create [Modifier Type] General Information page

The screenshot shows the 'Create Discount List: General Information' page. At the top, there's a navigation bar with links: Diagnostics, Home, Logout, Preferences, Help. Below this is a sub-navigation bar with 'Price Lists' and 'Modifier Lists'. A progress bar shows three steps: General Information (selected), Qualifiers, and Review. The main heading is 'Create Discount List: General Information'. There's a note: * Indicates required field. A 'Cancel' button and 'Step 1 of 3' are shown. Below this is a form with fields: Type (Discount List), Pricing Transaction Entity (Order Fulfillment), Source System (Advanced Pricing), * Name (js_Disc), * Number (js001), Version Number, Description, Currency (USD), Start Date (21-Jun-2005), End Date, Order Date From, Order Date To, Requested Ship Date From, Requested Ship Date To. At the bottom, there's a footer with navigation links: Home, Lists, Diagnostics, Home, Logout, Preferences, Help. Copyright text: Copyright 2000-2004 Oracle Corporation. All rights reserved. About this Page. Privacy Statement.

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Price Lists | **Modifier Lists**

Create Discount List: General Information

* Indicates required field Step 1 of 3

Type **Discount List**

Pricing Transaction Entity **Order Fulfillment**

Source System **Advanced Pricing**

* Name

* Number

Version Number

Description

Currency

Start Date

(example: 21-Jun-2005)

End Date

Order Date From

Order Date To

Requested Ship Date From

Requested Ship Date To

Step 1 of 3

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Note: The page name and details may vary slightly depending on the modifier list type being created.

The Type field displays the modifier list type you are creating. The Pricing Transaction Entity and Source System values default from the profiles QP: Pricing Transaction Entity and QP: Source System Code.

4. Enter a Name for the modifier list. You can use an alphabetic or alpha-numeric combination to identify the modifier; for example, Promo Modifier or Mod1234.

Note: The modifier Name should be unique across PTEs (Pricing Transaction Entities) otherwise an error occurs. For example, if a modifier named Corporate is created in the Order Management PTE, an error message displays if you create a Corporate modifier in the Purchasing PTE.

5. Enter a modifier list Number. This can be an alpha-numeric combination.
6. Enter a Version Number.
7. Enter a Description for the modifier list.
8. Choose one of the following:
 - Select a Currency, page 3-48. If a currency is selected such as US dollars (USD), the sales order must match the modifier currency to determine pricing for the order.
 - Optionally, select Optional Currency, page 3-48 to leave the Currency field in the modifier list blank. This option can be selected for modifiers where currency is not used as a criteria to select modifiers for the order.
9. Enter a Start/End Date.
10. Enter an Order Date From/To range.
11. Enter a Requested Shipped Date From/To range.
12. The Pricing For Global Use, page 3-49 box identifies if this modifier list and lines are available to all operating units or a specific operating unit. (The Pricing For Global Use box displays only if the profile QP: Security Control is turned on.)
 - If selected, then the modifier list and lines are available for all operating units.
 - If cleared, then the modifier list and lines are specific to the operating unit of the person that created the modifier. The pricing engine will only consider this modifier if the order has the same operating unit.

Note: For Modifier Types of Deal and Promotion:

Customer Must Ask For List: If selected, the customer must specifically request that the modifier benefit be applied, for example, by providing a special discount number, otherwise it will not be applied.

If the pricing engine selects multiple modifiers to apply to an order line, the modifiers for a Customer Must Ask For List receive a higher preference than other modifiers.

For Modifier Type of Deal:

Parent Promotions Detail region: Modifier list types of Promotion and Deal have a parent-child relationship for reporting purposes. A Deal modifier list must be associated with a Parent Promotion by providing the promotion name and version. Since this association is for reporting purposes, information that you define on the promotion is independent of and does not affect the information on the Deal modifier. The Promotion must already exist before you can select it.

Enter the Parent Number and Parent Version to specify the promotion to which the deal is associated.

13. Click Next to display the **Qualifiers** page where you can define eligibility rules for the modifier list. See Creating Qualifiers (HTML Interface), page 2-4.

Qualifiers page

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Price Lists | **Modifier Lists**

General Information **Qualifiers** Review

Create Discount List: Qualifiers

You can add qualifier conditions by clicking on "Create Qualifier". If you want to add a predefined set of qualifiers, click on "Append Group". [Cancel](#) [Back](#) Step 2 of 3 [Next](#) [Finish](#)

List Name **js_Disc**

[Append Group](#) [Create Qualifier](#)

Qualifiers	Context	Operator	Value From	Value To	Start Date	End Date	Update	Delete
No data exists.								

Qualifier

Qualifiers are eligibility conditions that must be met before a price list or modifier can be applied. Qualifier Groups are pre-existing qualifier conditions that can be reused on price lists or modifiers.

[Cancel](#) [Back](#) Step 2 of 3 [Next](#) [Finish](#)

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14. Complete your entries and click Next to display the **Create [Modifier List Type] Review** page.

Create [Modifier List Type] Review page

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[Price Lists](#) | [Modifier Lists](#)

General Information Qualifiers **Review**

Create Discount List: Review

Currency = US dollar Cancel Back Step 3 of 3 Finish

Type	Discount List	Start Date	21-Jun-2005
Pricing Transaction Entity	Order Fulfillment	End Date	
Source System	Advanced Pricing	Order Date From	
Name	js_Disc	Order Date To	
Number	js001a	Requested Ship Date From	
Version Number		Requested Ship Date To	
Description			
Currency	USD		

▼ **Qualifiers**

Qualifiers	Context	Operator	Value From	Value To	Start Date	End Date
No data exists.						

Cancel Back Step 3 of 3 Finish

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15. Review your entries. If changes are required, click the Back button to update the page.
16. Click Finish to save your work. A Confirmation page confirms that the modifier list has been created, and asks if you want to add modifier lines.

Creating Modifier Lines (HTML Interface)

Once you have created a modifier list, you can add modifier lines that define the type of price adjustments and benefits that the pricing engine applies to pricing requests.

You can add modifier lines:

- Directly after you create the modifier list from the Update [Modifier List Type]: Modifier Lines page.
- Whenever you want to add additional modifier lines.

The following tables show the type of modifier line you can create for a modifier list:

For the following Modifier List Type..	You can create these Modifier Line Types
Deal	Discount, Price Break, Promotional Goods, or Surcharge
Discount List	Discount, Price Break, or Surcharge
Promotion List	Discount, Price Break, Promotional Goods, or Surcharge
Surcharge List	Price Break, Surcharge

Note: Pricing security can affect the View and Maintain features associated with the Update and Details icons in the HTML user interface.

To create modifier lines:

1. Navigate to the Create Line page.
2. Select from the following modifier line types. The available line types depend on the modifier list type selected.
 - **Discount:** Creates a negative price adjustment.
 - **Promotional Goods:** Adds a new item to the order line with a price adjustment or benefit when the customer orders a particular item on the same order.
 - **Price Break:** Applies a variable discount or surcharge price adjustment to a pricing request based meeting the condition of a break type. You can use both point and range type breaks.
 - **Surcharge:** Creates a positive price adjustment. For example, a 10 percent handling charge is applied to a customer order.

The modifier Line Number defaults and can be updated. Each modifier line number must be unique within the modifier list (the line number cannot be duplicated).
3. Enter the Start and End Date range for this modifier. If you do not end an End Date then the modifier does not expire.
4. Click Continue to display the **Controls** page.

Related Topics

Creating a Discount Modifier Line (HTML), page 3-57

Creating a Promotional Goods Modifier Line (HTML), page 3-68

Creating a Price Break Modifier Line, page 3-60

Creating a Surcharge, page 3-74

Defining Controls for Modifier Lines (HTML Interface)

In the **Controls** page, you define pricing controls that govern how the modifier line should be applied.

To define controls for modifier lines:

1. Navigate to the Controls page.

Controls page

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Price Lists | **Modifier Lists**

Controls Product and Benefit Qualifiers Review

Create Discount Line: Controls

Modifier List **JS_1234** Line Number **154656** [Cancel](#) [Back](#) Step 1 of 4 [Next](#)

Modifier Level **Line** Incompatibility **Group 1 Incompatibility**
Only one modifier within the same incompatibility group will be applied for a phase.

Pricing Phase **PO List Line Adjustment** ☒ Automatically Apply
Bucket **Pricing Adjustments Bucket 1** ☐ Override

[Cancel](#) [Back](#) Step 1 of 4 [Next](#)

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2. Select a Modifier Level to determine at which level--line, group of lines, or order--the modifier line should be applied:
 - Line: Applies only to a specific order line.
 - Group of Lines: Applies to groups of lines in the order.
 - Order: Applies to an entire order. If Order is selected, then all products on the order will receive the benefit or price adjustment.

For example, a volume-based discount modifier applied at the line level will consider only volume on the qualifying line. A volume-based discount modifier applied at the group of lines level will process the volume across all qualifying lines in the product hierarchy.

3. Select a pricing phase, page 1-15 to determine when the pricing engine applies a modifier.

See the *Oracle Advanced Pricing Implementation Manual* for more information on pricing phases.

4. Select a Pricing Bucket.

Important: You must select a Bucket value to use the Net Amount Calculation field. This field displays in the Product page.

Pricing buckets control how the calculation of discounts and other benefits is sequenced using cascading price adjustments. This grouping helps to determine the

net selling price. Grouping discounts and benefits into buckets helps determine the net selling price across all pricing phases.

Different selling prices can result depending on how you group the discounts and benefits modifiers into buckets. When the pricing engine calculates price adjustments, it:

- Calculates percent type modifiers using the previous bucket's subtotal
- Sums all bucket modifier values to create a bucket subtotal

If the Bucket field is left blank, the modifier line is assigned to a Null bucket. Also, Order level modifiers must be in the Null bucket.

Modifiers assigned to a Null bucket are applied last and always adjust from the list price. The pricing engine used the following steps to evaluate the Null buckets and calculate the selling price:

- Calculates percent discounts using the list price.
- Sums all bucket modifier values to create a bucket subtotal.
- Applies the subtotal after the last numbered bucket.

Suppose that the following buckets are set up, each with a different adjustment:

- Null bucket: a 50% discount is assigned to the Null bucket.
- Bucket 1: a 10% discount is assigned.
- Bucket 2: a 10% surcharge is assigned.

The buckets are used to calculate the price for an SP ATO Model with a list price of \$55. The following table shows how the final price is calculated:

Bucket	Modifier Adjustment	Calculated Price	Final Price
Bucket 1	10% discount	$55 - (10\% \times 55)$	\$49.50
Bucket 2	10% surcharge	$49.5 + (10\% \times 49.5)$	\$54.45
Null bucket	50% discount. Note: The modifiers are applied last and taken out of the list price.	$54.45 - (50\% \times 55)$	\$26.95

5. Select an Incompatibility Group for the modifier line:

- Exclusive: If one of the modifiers is Exclusive, then only the Exclusive modifier is applied.
- Group 1 incompatibility
- Group 2 incompatibility
- Group 3 incompatibility

Incompatibility occurs when the pricing engine finds more than one modifier to return but only one can be applied. The engine resolves this incompatibility using either precedence or best price.

You can make modifiers incompatible with each other by placing them in the same incompatibility group level. When this is done, the pricing engine applies only one modifier per phase to the order line or order.

Only one modifier within the same incompatibility group will be applied for a phase. See the *Oracle Advanced Pricing Implementation Manual* for more information on incompatibility resolution, precedence, and best price.

6. Select Automatically Apply to have the modifier applied automatically by the pricing engine. Certain modifiers must be applied automatically and in these cases, you cannot change the value.
7. On the modifier line, the Customer Must Ask For List field is read-only, based on the value selected for the Modifier List. This field will only be visible when the list type is Promotion or Deal.
8. Select Override to enable the modifier adjusted price to be manually overridden. If not selected then the modifier adjusted price cannot be overridden.

Note: The Override box displays only for those types of modifier that supports override.

Creating a Discount Modifier Line (HTML Interface)

You can create a discount modifier line to create a negative price adjustment. For example, to give a 10 percent discount.

To create a discount modifier line:

1. Navigate to the **Create Line** page.

Create Line page: Discount Modifier

The screenshot shows the 'Create Line' page in the Oracle Advanced Pricing HTML interface. The page title is 'ORACLE' Advanced Pricing. The breadcrumb trail is: Lists : Modifier Lists > Update Deal List: General Information > Update Deal List: Modifier Lines > Create Line. The page has a 'Home' and 'Lists' tab bar, with 'Lists' selected. Below the breadcrumb trail, the page title 'Create Line' is displayed. The 'Modifier List' is set to '001'. There are 'Cancel' and 'Continue' buttons. The form contains the following fields: 'Modifier Type' (a dropdown menu with 'Discount' selected), 'Start Date' (a date field with '04-Mar-2004' and a calendar icon, with a note '(example: 18-Feb-2004)'), 'Line Number' (a text field with '150845'), and 'End Date' (a date field with a calendar icon). There are 'Cancel' and 'Continue' buttons at the bottom of the form. The footer contains the text 'Copyright 2003 Oracle Corporation. All rights reserved.' and a 'Privacy Statement' link.

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Price Lists | **Modifier Lists**


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Create Line

Modifier List 001 [Cancel](#) [Continue](#)

* Indicates required field

Modifier Type Start Date 
(example: 18-Feb-2004)

* Line Number End Date 

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2. Select Discount as the Modifier Type.

The modifier Line Number defaults and can be updated. Each modifier line number must be unique within the modifier list (the line number cannot be duplicated).

3. Select a date range for the Start/End Dates.
4. Click Continue to display the **Create Discount Line: Controls** page.
5. In this page, you can define controls for the modifier line. See Defining Controls , page 3-54 for more information on setting up and using controls.
6. After you have set up the controls, click Next to display the **Create Discount Line: Product and Benefit** page.

Create Discount Line: Product and Benefit page

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Price Lists | **Modifier Lists**

Controls Product and Benefit Qualifiers Review

Create Discount Line: Product and Benefit

Modifier List **VIP 001** Line Number **150241** [Cancel](#) [Back](#) Step 2 of 4 [Next](#)

* Indicates required field

Product Level Volume Method [?](#)

* Product [🔍](#) * Value From

Product Description **Sentinel Standard Desktop** * Value To

* UOM [🔍](#) Based On

Precedence

▼ Pricing Attributes

Pricing attributes further define how you want to price the product, such as by color or size.

Attribute	Context	Operator	Value From	Value To	Remove
COLOR	PS-PC	Is	Black		✖

[Add Another Row](#)

Benefit

Value and Formula fields are not required, but at least one of these fields must be entered.

Adjustment Method * Value

7. Select a Product Level. The available values depend on the Modifier Level selected from the **Controls** page:

- Order level selected: Then all products on the order will receive the discount.
- Line level selected: Then the Product Level field defaults to null.
- Group of Lines selected: Then the Product Level defaults to Item Number.

Note: Alternately, you can leave the Product Level field blank to create a discount that is not product-specific. If the Product Level field is left blank, then the Pricing Attributes, Volume Method, and Excluded regions do not display.

8. Select a Product that is eligible for the discount. Click the Search icon to search for available products. The Product Description defaults based on the product selected.

9. Select a unit of measure (UOM):

- If the Modifier Level is Line, the UOM field is required only if the volume type is Item Quantity.
- If the Modifier Level is Group of Lines, the UOM is required except when the volume type is Item Amount.

The Precedence value defaults based on the product level selected. You can overtype this value.

10. Select a Volume Method.

1. For the selected Volume Method, enter the Value From/To. For example, if you selected Is Between, then you can enter a range in the Value From and Value To fields.
2. Select a Based On value.

Note: If the Volume Method field is left blank, the Value From/To and Based On fields do not display.

11. In the Pricing Attributes region, select an Attribute to further define how you want to price the product such as by color or size.

1. The Context value defaults and is display only.
2. Select an Operator such as Is, Is Not, or Between.
3. Enter a Value From/To. For example, if you selected Between, then you can enter a range in Value From and Value To fields.
4. Optionally, click Add Another Row to add additional pricing attributes or click Remove to remove a pricing attribute.

12. In the Excluded Products region, you can exclude certain products so that the pricing adjustments from the modifier line will not be applied to those products.

Note: The Excluded Products region does not display if Item Number is selected as the Product Level or if the Product Level field is left blank.

For example, suppose you set up a Discount modifier line for the Item Category of designer shoes; however, some brands of designer shoes should be excluded from the price adjustment. Therefore, in the Excluded Products region, you would select the brands of designer shoes to be excluded from the price adjustment.

1. Select the Product Level and Product for the excluded item. This product will be excluded from the Item Category or All Items selected in the Product level field.
2. Optionally, click Add Another Row to enter additional Excluded Products or click Remove to remove a selected product.

13. In the Benefit region, select an Application Method (Adjustment Method), page 3-3.

1. Enter the Value for the selected Adjustment Method. For example, if you selected Percent as the adjustment method, enter 10 as the Value to give a 10% adjustment.
2. Optionally, select a Formula if you are using a formula to calculate the benefit.

Note: Both the Value and Formula fields are not required, but at least one of these fields must be entered.

14. Complete your entries, and click Next to proceed to the review page, or click Finish to skip the review page and save the line.
15. Click Next to display the **Qualifiers** page where you can define eligibility rules for the modifier line.

A Confirmation message confirms if the modifier line is successfully created.

Related Topics

Creating Qualifiers (HTML Interface), page 2-4

Creating a Price Break Modifier Line (HTML Interface)

A Price Break Modifier applies a variable discount or surcharge price adjustment to a pricing request based on the conditions of the break type. You can use both point and range type breaks.

Using Price Breaks

You can use either Point price breaks or Range price breaks to apply a variable discount or surcharge price adjustment to a pricing request:

- **Point:** The pricing engine charges each unit of volume at the price of the break within which the total falls.
- **Range:** The pricing engine charges each unit of volume at the price of the break within which it falls.

The following example table provides an example of a price break sequence:

Product Attribute	Value From	Value To	Value (%)
Item A	1	100	5
Item A	101	200	10
Item A	250	<all 9's>	15

Suppose a customer is eligible for the preceding price break, and places an order for a quantity of 150 of Item A. The pricing engine calculates the discount differently depending on the type of price break selected:

- **Point:** If the total quantity of Item A is 150, the discount is against 150 at 10%.
- **Range:** If the total quantity of Item A is 150, the discount is against 100 at 5% and 50 at 10%.

Removing Price Break Lines

You can remove the price break lines on the benefit region for a price break modifier during the create flow. However, once they are saved, they cannot be removed. The price break lines can still be updated.

To create a price break modifier:

1. Navigate to the **Create Line** page.

Create Line page: Price Break

The screenshot shows the Oracle Advanced Pricing interface. At the top, there's a navigation bar with links: [Diagnostics](#), [Home](#), [Logout](#), [Preferences](#), and [Help](#). Below this is a breadcrumb trail: [Price Lists](#) | [Modifier Lists](#). The main heading is "Create Line".

Fields displayed:

- Modifier Name: JS-001
- Modifier List: JS-001
- Currency: USD
- Buttons: [Cancel](#), [Continue](#)

A note indicates: * Indicates required field.

Fields for the modifier line:

- Modifier Type: Price Break (dropdown menu with a required field icon)
- Start Date: 06-Jun-2005 (calendar icon)
- End Date: (empty field with calendar icon)
- Line Number: 161585 (text input)

Buttons: [Cancel](#), [Continue](#)

Footer:

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2. Select Price Break as the Modifier Type.
3. The modifier Line Number defaults and can be updated. Each modifier line number must be unique within the modifier list (the line number cannot be duplicated).
4. Select a Start and End Date range when the modifier line is effective. You should specify a range that coincides with the period of time that the benefit is offered. If no End Date is entered, then the modifier line does not expire.
5. Click Next to display the **Create Price Break Line: Controls** page.
6. Define Controls.

Create Price Break Line: Controls page

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Create Price Break Line: Products

Modifier Name JS-001
Modifier List JS-001

Currency USD
Line Number 161585

Cancel Back Step 2 of 5 Next

* Indicates required field

Product All Items

Product Description All

UOM Ea

* Precedence 315

▼ Pricing Attributes

Pricing attributes further define how you want to price the product. An example is 'Color is Red' where 'Attribute' equals 'Color' and 'Value' equals 'Red'.

Attribute	Context	Operator	Value From	Value To	Remove
		Is			
Add Another Row					

▼ Excluded Products

These products in the table receiving the benefit.

Product Level	Product
Item Number	AS54E
Add Another Row	

Price Break Benefits

Adjustment Type Discount

Volume Based on Item Amount

Volume Method Range

Accumulation Attribute

1. In this page, you can define controls for the modifier line. See Defining Controls, page 3-54 for Modifier Lines (HTML Interface) for more information on setting up and using controls.
2. After you have set up the controls, click Next to display the **Create Price Break Line: Products** page.
7. Define Products
 1. Enter information about the product and product volume that the customer must buy to get the benefit.

Create Price Break Line: Products page

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Price Lists | **Modifier Lists**

Controls **Products** Benefits Qualifiers Review

Create Price Break Line: Products

Modifier Name **JS-001** Currency **USD** Cancel Back Step 2 of 5 Next
 Modifier List **JS-001** Line Number **161585**

* Indicates required field

Product **All Items**
 Product Description **All**
 UOM **Ea**
 * Precedence **315**

▼ Pricing Attributes
 Pricing attributes further define how you want to price the product. An example is 'Color is Red' where 'Attribute' equals 'Color' and 'Value' equals 'Red'.

Attribute	Context	Operator	Value From	Value To	Remove
		Is			

Add Another Row

▼ Excluded Products
 These products in the table receiving the benefit.

Product Level	Product
Item Number	AS54E

Add Another Row

Price Break Benefits

Adjustment Type **Discount** Accumulation Attribute
 Volume Based on **Item Amount**
 Volume Method **Range**

2. Select a Product that is eligible for the price break. Click the Search icon to search for available products.

Note: If All Items is selected for Product Level, then the Product field defaults to All meaning all products.

The Product Description defaults based on the product selected.
3. Enter a UOM (unit of measure).

The Precedence value defaults based on the product level selected. You can overtype this value.
8. In the Pricing Attributes region, select a pricing Attribute(s) that further define how you want to price the product such as by color or size.
 1. Select an Attribute.

The Context value defaults and is display only.
 2. Select an Operator such as Is, Is Not, or Between.
 3. Enter a Value From/To. The fields that display depend on the Volume Method selected in the preceding steps. For example, if you selected Is Between, then you can enter a range in Value From and Value To.
 4. Optionally, click Add Another Row to add additional pricing attributes or click Remove to remove a pricing attribute.

9. In the Excluded Products region, you can exclude certain products so that the pricing adjustments from the modifier line will not be applied to those products.

Note: The Excluded Products region does not display if Item Number is selected as the Product Level or if the Product Level field is left blank.

For example, suppose you set up a Discount modifier line for the Item Category of designer shoes; however, some brands of designer shoes should be excluded from the price adjustment.

Therefore, in the Excluded Products region, you would select the brands of designer shoes to be excluded from the price adjustment.

1. Select the Product Level and Product for the excluded item. This product will be excluded from the Item Category or All Items selected in the Product Level field.
2. Optionally, click Add Another Row to enter additional Excluded Products or click Remove to remove a selected product.

10. In the Price Break Benefits region, define the price break benefits for the modifier line:

1. Select an Adjustment Type such as Discount or Surcharge.
2. Select a Volume Based on value to define how the buy volume is evaluated before the benefit is given:
 - Item Quantity: Creates a price break based on the number of items that the customer orders.
 - Item Amount: This could be a monetary value. (Item Amount must be selected to use the Net Amount Calculation feature.)
 - Accumulate Line Quantity: Creates an accumulated range price break that accumulates across orders. If Accumulate Line Quantity is selected, then the Accumulation Attribute field displays. Select an Accumulation Attribute that defines the value to be accumulated. This option can only be selected for Range price breaks. See Using Accumulated Range Breaks, page 3-36 for more information.
 - Select a Volume Method: Point or Range. See Using Point and Range Price Breaks, page 3-60 for more information.

11. Define Net Amount Calculation (optional step):

You can use net amount calculation to calculate the selling price based on the bucketed Item Amount volume. For more information, see: Using Net Amount with Price Breaks, page 3-33

Note: To use Net Amount Calculation , the following fields must also be selected:

In Controls page:

- Bucket: Must be selected.
- Modifier Level: Line or Group of Lines (Group of Lines must be selected to use the For matching products option from the Net Amount Calculation field.)
- Apply automatically box: Selected

In Products page:

- Volume Based on: Item Amount

Choose one of the following from the Net Amount Calculation field:

- **For matching products:** When this option is selected, the order lines that match the Product criteria (such as the Item Number or Item Category) defined by the price break modifier are selected and grouped. The sum of the amounts from these order lines is selected and then used as the group amount for the net amount calculations. If the modifier level is Line, then you can only select For All Matching Attributes and not For matching products.

Example

For example, suppose you create a price break modifier line with the following setup (simplified example):

- Product: Item Number = AS54888
- Net Amount Calculation: For matching products selected
- Pricing Attribute: Red

If the modifier is then applied against the following order, then all order lines that match the product defined by the price break modifier line (for example, Item Number = AS54888) are grouped together for the net amount calculations (regardless of other qualifying criteria):

Line	Product	Pricing Attribute
1	Item Number: AS54888	Red
2	Item Number: AS54888	Blue
3	Item Number: AS54888	Red

Results

The summation for item amount is based on the item amount for all 3 lines, but the discount is applied on lines 1 and 3.

- **Lines used for Net Amount Calculations:** All order lines with Product Item Number = AS54888 are grouped together.
- **Lines that get discount:** The modifier adjustment (such as a discount) will then only be applied to Lines 1 and 3. The discount is applied only to these lines because they completely match the modifier's remaining qualifying criteria (pricing attribute must be Red.)
- **For all matching attributes:** When this option is selected, the order lines that match **all the criteria** (not just the Product criteria) defined in the price break modifier are selected and grouped. The sum of the amounts from these order lines are then used as the group amount for the net amount calculations.

Note: Promotional Goods and Net Amount Calculation

Promotional goods amounts will not be included in the net amount calculation. For example, if an order line gets a promotional good

(buy A, get B free or discounted), the new line will not contribute to any net amount calculation of any modifier in the order.

12. Click Next to display the **Create Price Break Line: Benefits** page

Create Price Break Line: Benefits

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Controls Products **Benefits** Qualifiers Review

Create Price Break Line: Benefits

Modifier Name **JS-001** Currency **USD** [Cancel](#) [Back](#) Step 3 of 5 [Next](#)
 Modifier List **JS-001** Line Number **161585**

* Indicates required field

Adjustment Type **Discount** Accumulation Attribute
 Volume Based on **Item Amount**
 Volume Method **Range**

*Value From	*Value To	*Adjustment Value	Adjustment Method	Formula	Remove
1000	2000	10	Percent		
2001	3000	12	Percent		

[Add Another Row](#)

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1. Define the following values for each price break:
2. Enter the Value From/To to define the price break range. For example, to define a break for the first 10 items ordered, create a range from 1-10. To do this, enter 1 in Value From and 10 in Value To.
3. Enter an Adjustment Value. For example, if you enter 10 in the Adjustment Value field and select Percent as the Adjustment Method, then you create a 10% adjustment.
4. Select an Application Method (Adjustment Method), page 3-3 to define how the price is to be adjusted.

Optionally, select a Formula if you are using a formula to calculate the benefit.

Note: Both the Value and Formula fields are not required, but at least one of these fields must be entered.

5. Click Next to display the **Create Price Break Line: Qualifiers** page.

13. Define Qualifiers

Create Price Break Line: Qualifiers page

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Create Price Break Line: Qualifiers

Modifier Name **JS-001** Currency **USD** [Cancel](#) [Back](#) Step 4 of 5 [Next](#) [Finish](#)
Modifier List **JS-001** Line Number **161585**

You can add qualifier conditions by clicking on "Create Qualifier". If you want to add a predefined set of qualifiers, click on "Append Group".

[Append Group](#) [Create Qualifier](#)

Qualifiers	Context	Operator	Value From	Value To	Start Date	End Date	Update	Delete
No data exists.								

Qualifier
Qualifiers are eligibility conditions that must be met before a price list or modifier can be applied. Qualifier Groups are pre-existing qualifier conditions that can be reused on price lists or modifiers.

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1. Define eligibility rules for the modifier line. See Creating Qualifiers (HTML Interface), page 2-4 for more information on setting up qualifiers.
2. Complete your entries, and click Next to display the review page, or click Finish to skip the review page and save the line.

Create Price Break Line: Review page

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Create Price Break Line: Review

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Modifier List

JS-001

Modifier Name

JS-001

Currency

USD

Line Type

Price Break

Line Number

161585

Start Date

06-Jun-2005

End Date

Controls

Modifier Level

Line

Pricing Phase

List Line Adjustment

Bucket

Incompatibility

Apply automatically

Yes

Allow Benefit Override

No

Products

Product

All Items

Product Description

All

UOM

Ea

Precedence

315

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Pricing Attributes

Attribute	Context	Operator	Value From	Value To
No data exists.				

Excluded Products

Product Level	Product
Item Number	AS54888

Benefits

Return to Top

A Confirmation message confirms if the modifier line is successfully created.

Creating a Promotional Goods Modifier Line (HTML Interface)

When the customer orders one or more specified items on the same order, you can create a Promotional Goods modifier line to add a new item to an order and provide a price adjustment or benefit for the item . The item does not need to be originally on the order. Even if the item is on the order, the pricing engine creates a new line for the item.

To create a promotional goods modifier line:

1. Navigate to the **Create Line** page.

Create Line page

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Price Lists | **Modifier Lists**

Create Line

Modifier Name **jspromo**

Modifier List **jspromo1**

Currency **USD**

[Cancel](#) [Continue](#)

* Indicates required field

Modifier Type **Promotional Goods** ⓘ

Start Date **16-May-2005** ⓘ
(example: 16-May-2005)

* Line Number **134636**

End Date ⓘ

[Cancel](#) [Continue](#)

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2. Select Promotional Goods as the Modifier Type.
The modifier Line Number defaults and can be updated. Each modifier line number must be unique within the modifier list (the line number cannot be duplicated).
3. Select a Start and End Date range when the modifier line is effective. You should specify a range that coincides with the period of time that the benefit is offered. If no End Date is entered, then the modifier line does not expire.
4. Click Continue to display the **Create Promotional Goods Line: Controls** page.

Create Promotional Goods Line: Controls page

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Price Lists | **Modifier Lists**

Controls Required Products Benefits Qualifiers Review

Create Promotional Goods Line: Controls

Modifier Name **jspromo**

Currency **USD**

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Modifier List **jspromo1**

Line Number **134636**

Modifier Level **Line**

Incompatibility **Exclusive**

[i](#)

Pricing Phase **List Line Adjustment**

Apply automatically **Yes**

[i](#)

Bucket

[i](#)

By Request Only **No**

[Cancel](#) [Back](#) Step 1 of 5 [Next](#)

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5. In this page, you can define controls for the modifier line. For more information on setting up and using controls, see *Defining Controls for Modifier Lines (HTML Interface)*, page 3-54.
6. When you have entered the Controls, click Next to display the **Create Promotional Goods Line: Required Products** page.

Create Promotional Goods Line: Required Products page

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Price Lists | **Modifier Lists**

Controls Products Benefits Qualifiers Review

Create Promotional Goods Line: Required Products

Modifier Name **jspromo** Currency **USD** [Cancel](#) [Back](#) Step 2 of 5 [Next](#)
 Modifier List **jspromo1** Line Number **134636**

Products entered on this page are required buy products
 * Indicates required field

Product *AS54888 [?](#)
 Product Description **Sentinel Standard Desktop**
 UOM [?](#)
 * Precedence [?](#)

Pricing Attributes
 Pricing attributes further define how you want to price the product. An example is 'Color is Red' where 'Attribute' equals 'Color' and 'Value' equals 'Red'.

Attribute	Context	Operator	Value From	Value To	Remove
<input type="text"/>		<input type="text" value="Is"/>	<input type="text"/>	<input type="text"/>	?

[Add Another Row](#)

[Cancel](#) [Back](#) Step 2 of 5 [Next](#)

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7. Define the required *buy* product (or category) that the customer must order to get the benefit. For example: buy a toothbrush, get a free bottle of mouthwash.
8. Select a Product Level and Product.
9. Select a unit of measure (UOM):
 - If the Modifier Level is Line, the UOM field is required only if the volume type is Item Quantity.
 - If the Modifier Level is Group of Lines, the UOM is required except when the volume type is Item Amount.

The Precedence value defaults based on the product level selected. You can overtype this value.
10. Select a Volume Method and enter the Value From/To. For example, if you selected Is Between, then you can enter a range in the Value From and Value To fields.
11. Select a Based On value.

Note: If the Volume Method field is left blank, the Value From/To and Based On fields do not display.
12. In the Pricing Attributes region, select an Attribute(s) that further define how you want to price the product such as by color or size.

The Context value defaults and is display only.

 1. Select an Operator such as Is, Is Not, or Between.

2. Enter a Value From/To. For example, if you selected Between, then you can enter a range in Value From and Value To fields.
3. Optionally, click Add Another Row to add additional pricing attributes or click Remove to remove a pricing attribute.
13. In the Excluded Products region (if applicable), you can exclude certain products so that the pricing adjustments will not be applied to the excluded products. For example, suppose you set up a discount modifier for the Item Category of designer shoes; however, some brands of designer shoes should never be discounted. Therefore, in the Excluded Products region, you would select the brands of designer shoes to be excluded from the benefit.

Note: The Excluded Products region does not display if Item Number is selected as the Product Level in the Products region.

1. Select the Product Level and Product for the excluded item.
2. Optionally, click Add Another Row to enter additional Excluded Products, or click Remove to remove a selected product.
14. When you have completed your entries, click Next to display the **Create Promotional Goods Line: Benefits** page.

Create Promotional Goods Line: Benefits page

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Controls Products **Benefits** Qualifiers Review

Create Promotional Goods Line: Benefits

Modifier Name **jspromo** Currency **USD** [Cancel](#) [Back](#) Step 3 of 5 [Next](#)

Modifier List **jspromo1** Line Number **134636**

These products are added to the order when the required products are ordered.
* Indicates required field

*Product	Product Description	*UOM	*Quantity	*Price List	List Price	Adjustment Method	*Value	Remove
AS18947	Sentinel Deluxe Desktop	Ea	1	1300		Percent	10	

[Add Another Row](#)

[Cancel](#) [Back](#) Step 3 of 5 [Next](#)

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15. In this page, you can define the product the customers get when they purchase the buy product defined in the preceding step. For example, if they buy a toothbrush, the toothpaste is automatically added to the order line at a 10% discount.

16. Select a Product. The Product Description defaults based on the product selected.
17. Enter a UOM (unit of measure) such as each (Ea). The unit of measure is used with the Quantity field to determine how the benefit is applied.
18. Enter the Quantity.
19. Select the Product from available price lists. The List Price for the selected product defaults from the selected price list.
20. Select an Application Method (Adjustment Method), page 3-3 that defines how the pricing engine applies this modifier.
21. Enter the Value for the selected Adjustment Method. For example, if you selected Percent as the adjustment method, enter 10 as the Value to give a 10% adjustment.
22. Optionally, click Add Another Row to add additional lines, or click Remove to remove a selected line. However, once the benefit line is created and saved, you cannot remove this benefit line or update the product.
23. Click Next to display the **Create Promotional Goods Line: Qualifiers** page.

Create Promotional Goods Line: Qualifiers page

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Price Lists | **Modifier Lists**

Controls Products Benefits **Qualifiers** Review

Create Promotional Goods Line: Qualifiers

Modifier Name **jspromo** Currency **USD** [Cancel](#) [Back](#) Step 4 of 5 [Next](#) [Finish](#)

Modifier List **jspromo1** Line Number **134636**

You can add qualifier conditions by clicking on "Create Qualifier". If you want to add a predefined set of qualifiers, click on "Append Group".

[Append Group](#) [Create Qualifier](#)

Qualifiers	Context	Operator	Value From	Value To	Start Date	End Date	Update	Delete
No data exists.								

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24. Define eligibility rules for the modifier line. See Creating Qualifiers, page 2-4 (HTML Interface) for more information on setting up qualifiers.
25. Complete your entries, and click Next to proceed to the review page, or click Finish to skip the review page and save the line.

A Confirmation message confirms if the modifier line is successfully created.

Deleting and reapplying a Promotional Goods modifier line:

Deleting and reapplying a Promotional Goods modifier line: If you apply a modifier line of type Promotional Goods to an order, then delete the modifier line, you cannot reapply the deleted Promotional Goods modifier line.

Creating a Surcharge Modifier Line (HTML Interface)

You can use a Surcharge modifier line to add a positive price adjustment. For example, to apply a 10 percent special charge to a customer's order.

1. Navigate to the **Create Line** page.

Create Line page

The screenshot displays the 'Create Line' page in the Oracle Advanced Pricing interface. At the top, there's a navigation bar with 'Diagnostics', 'Home', 'Logout', and 'Preferences'. Below this, a breadcrumb trail shows 'Lists : Modifier Lists > Update Surcharge List: Modifier Lines'. The main heading is 'Create Line'. A sub-header indicates the 'Modifier List JS123Sur'. There are 'Cancel' and 'Continue' buttons. The form includes a note '* Indicates required field'. The 'Modifier Type' is set to 'Surcharge' in a dropdown menu. The 'Line Number' is '154661'. The 'Start Date' is '09-MAR-2004' with a calendar icon, and the 'End Date' is empty with a calendar icon. A note '(example: 23-FEB-2004)' is shown below the start date. At the bottom, there are 'Cancel' and 'Continue' buttons, and a footer with 'Copyright 2003 Oracle Corporation. All rights reserved.' and a 'Privacy Statement' link.

2. Click Create Line to create a blank line.
3. Select Surcharge as the Modifier Type.

The modifier Line Number defaults and can be updated. Each modifier line number must be unique within the modifier list (the line number cannot be duplicated).
4. Select a range for the Start/End Dates.
5. Click Continue to display the **Create Surcharge Line: Controls** page.

In this page, you can define controls that govern how the modifier line should be applied. See Defining Controls for Modifier Lines (HTML Interface), page 3-54 for information on setting up pricing controls.
6. When you have completed your entries, click Next to display the **Create Surcharge Line: Product and Benefit** page.

Create Surcharge Line: Product and Benefit page

ORACLE[®] Advanced Pricing Diagnostics Home Logout Preferences

Price Lists | **Modifier Lists** Home Lists

Controls **Product and Benefit** Qualifiers Review

Create Surcharge Line: Product and Benefit

Modifier List **JS123Sur** Line Number **154663** Cancel Back Step 2 of 4 Next

* Indicates required field

Product Level Volume Method ⓘ

* Product ⓘ * Value From

Product Description **Sentinel Standard Desktop** * Value To

* UOM ⓘ Based On

Precedence

▼ Pricing Attributes

Pricing attributes further define how you want to price the product, such as by color or size.

Attribute	Context	Operator	Value From	Value To	Remove
COLOR	PS-PC	Is	Black		

[Add Another Row](#)

Benefit

7. Select a Product Level. If the Modifier level selected on the **Controls** page is:
 - Order level: Then all products on the order will receive the surcharge.
 - Line level: Then the Product level field defaults to null.
 - Group of Lines: Then the Product Level defaults to Item Number.
8. Select a Product or click the Search icon to search for available products. The Product Description defaults based on the product selected.

Note: If All Items is selected for Product Level, then the Product field defaults to All meaning all products.
9. Select a UOM (unit of measure):
 - If the Modifier Level is Line, the UOM field is required only if the volume type is Item Quantity.
 - If the Modifier Level is Group of Lines, the UOM is required except when the volume type is Item Amount.

The Precedence value defaults based on the Product Level selected. You can overtype this value.
10. Select a Volume Method.
 1. For the selected Volume Method, enter the Value From/To. For example, if you selected Is Between, then you can enter a range in the Value From and Value To fields.
 2. Select a Based On value.

Note: If the Volume Method field is left blank, the Value From/To and Based On fields do not display.

11. In the Pricing Attributes region, select an Attribute(s) that further define how you want to price the product such as by color or size.

The Context value defaults and is display only.

1. Select an Operator such as Is, Is Not, or Between.
 2. Enter a Value From/To. For example, if you selected Between, then you can enter a range in Value From and Value To fields.
12. Optionally, in the Excluded Products region, you can select the Product Level and Products to be excluded from the modifier pricing adjustments. This product will be excluded from the Item Category or All Items selected in the Product level field. For example, suppose you set up a Discount modifier line for the Item Category of designer shoes; however, some brands of designer shoes should be excluded from the price adjustment. Therefore, in the Excluded Products region, you would select the brands of designer shoes to be excluded from the price adjustment.

Note: The Excluded Products region does not display if Item Number is selected as the Product Level or if the Product Level field is left blank.

13. In the Benefit region, enter a Value, then select an Application Method (Adjustment Method), page 3-3. For example, if you selected Percent as the Adjustment Method and 10 for the Value, then the price is adjusted by 10%.
14. Optionally, select a Formula.

Note: Both the Value and Formula fields are not required, but at least one of these fields must be entered. Formulas are available for modifier lines types of Discount and Surcharge.

15. Click Next to display the **Create Surcharge Line: Qualifiers** page where you can define eligibility rules for the modifier line. For more information on setting up qualifiers, see *Creating Qualifiers (HTML Interface)*, page 2-4.
16. Complete your entries, and click Next to proceed to the review page, or click Finish to skip the review page and save the line.

A Confirmation message confirms if the modifier line is successfully created.

Searching for Modifier Lists (HTML Interface)

In the **Modifier Lists Search** page, you can use searches to quickly retrieve information about modifiers. This helps you find information essential to your business such as:

- All modifier lists in USD currency.
- Specific modifier lines.
- All active Promotion modifier lists.
- All modifier lists for Customer A.
- All discount modifier lists.

- All promotions that will end on May 31st (must be an exact date match only).

Note: Alternately, you can do searches for modifier lists from the **Oracle Advanced Pricing Home**, page 1-4 page.

Once the search results are returned, you can view a summary of modifier lists, view general information about the modifier list such as Name, Number, Type, Start/End Dates, and Active status, or select a specific modifier list to view additional details.

In addition to viewing the modifier lists, you can choose to update, and create a new modifier list.

Note: You must be assigned Maintain privileges in pricing security to update or create a new modifier. The Details icon is enabled if you have view or update privileges assigned through pricing security.

To search for modifier lists:

1. Navigate to the **Modifier Lists Search** page.

Modifier Lists Search page

ORACLE Advanced Pricing [Home](#) [Logout](#) [Preferences](#) [Help](#) [Personalize Page](#)

[Price Lists](#) | **Modifier Lists**

Modifier Lists

Search

Search

Create List

Name	Number	Type	Start Date	End Date	Active Status	Update	Details
No search conducted.							

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2. Select a search category from the Search list, then enter additional criteria next to the Search list to narrow your search results. Select from the following search categories:
 - Status: Search by Active or non-Active modifier lists.
 - Active: Finds all Active modifier lists.
 - Inactive: Finds Inactive modifier lists.

- **Currency:** Search by Currency. Select a specific currency such as USD (US dollars) to find all modifier lists set up in USD.
- **List Name:** Search by the modifier list name. Enter a specific name or enter the percent sign (%) to list all modifier lists.
- **Dates:** Search by modifier list Dates. These start and end dates must match exactly to the dates in the modifier list setup.
- **Line Number:** Search by a modifier line number.
- **Type:** Search by a specific modifier list type such as Deal, Discount List, Promotion, or Surcharge List.
- **List Number:** Search by modifier list number. Enter a List Number to find a specific modifier list.

For example, to find a modifier list by its name, select Name from the Search list, then enter the specific name of the modifier list such as Summer Discount Modifier.

3. Click Go to display the following search results in a table:

- **Name:** The modifier list Name.
- **Number:** The modifier list Number.
- **Type:** The modifier list Type.
- **Start/End Date:** The start and end date for the modifier list.
- **Active:** Indicates if the modifier is Active or Inactive.

Optionally, click Update to update the modifier list, or click Details to view additional details about the modifier list.

Note: When pricing security is turned off, either the Details or Update icon displays depending on the profile QP: Source System. If the modifier list is created in a different source system within the same PTE, you can only view the list. You can only update the modifier list that matches your PTE and Source System.

Related Topics

Oracle Advanced Pricing Home page (HTML Interface), page 5-31

Creating a Modifier List (HTML Interface), page 3-48

Updating a Modifier (HTML Interface), page 3-78

Updating a Modifier (HTML Interface)

You can update a modifier to change information such as its effective start and end dates then save your changes. All fields can be updated except for the List Type, Pricing Transaction Entity (if there are modifier lines), Source System (if there are modifier lines), Name, and Number.

Note: Pricing security can affect the View and Maintain features associated with the Update and Details icons in the HTML user interface. See Pricing Security (HTML Interface), page 1-3 for more information.

To update a modifier:

1. Navigate to the **Update [Modifier Type]: General Information** page.

Note: The actual page name depends on the type of modifier being updated.

Update [Modifier Type]: General Information page

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Price Lists | **Modifier Lists**

[General Information](#)
[Modifier Lines](#)
[List Qualifiers](#)

[Lists : Modifier Lists](#)

Update Promotion List: General Information

[Cancel](#) [Apply](#)

Type	Promotion
Pricing	Order Fulfillment
Transaction Entity	
Source System	Oracle Marketing
Name	10% Discount
Number	offer01
Version Number	
Number	
Description	
Currency	USD

Start Date

(example: 23-FEB-2004)

End Date

Order Date From

Order Date To

Requested Ship Date From

Requested Ship Date To

☐ Customer Must Ask For List

☐ Active

[Cancel](#) [Apply](#)

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2. Update the fields that require changes:
 - Version Number
 - Requested Ship date
 - Start/End Date
 - Order Date From/To
 - Requested Ship Date From/To
 - Description
 - Currency
3. Select or clear the Customer Must Ask For List box (if applicable).
4. Select or clear the Active box:
 - To make a modifier active, select Active.
 - To make a modifier inactive, clear Active.

When a modifier list is first created, it is Inactive. The pricing engine evaluates only Active modifiers (when the Active box is selected). When a modifier is no longer required, change the status of the modifier to Inactive so only Active modifiers are evaluated.

5. Click Apply to save the changes.

A Confirmation page displays to advise you if the changes were updated successfully.

Related Topics

Creating a Modifier List (HTML Interface), page 3-48

Creating Modifier Lines (HTML Interface), page 3-53

Updating a Qualifier (HTML Interface), page 2-7

Updating a Modifier Line (HTML Interface)

You can update an existing modifier line to change information such as controls, products and benefits, and qualifiers. You can add additional qualifiers, excluded items, and additional buy and get products.

However, you cannot update the following:

- The primary buy product for the modifier line cannot be removed or changed.
- Once a modifier line is saved, you cannot delete additional buy and get items.

The following fields cannot be updated: List Type, Pricing Transaction Entity/Source System, Name, Number, Product Level, Product, Modifier Level, and Line Number.

Note: Pricing security can affect the View and Maintain features associated with the Update and Details icons in the HTML user interface. See Pricing Security (HTML Interface), page 1-3 for more information.

To update a modifier line:

1. Navigate to the **Update [Modifier Type]: Modifier Lines** page.

Update [Modifier Type]: Modifier Lines page

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Price Lists | **Modifier Lists**

[General Information](#)
[Modifier Lines](#)
[List Qualifiers](#)

Update Discount List: Modifier Lines

List Name **js-NetAmt** Currency **USD** [Cancel](#) [Apply](#)
List Number **js001**

Search
Search [Go](#)

[Create Line](#)

Modifier Type	Line Number	Level	Product	UOM	Start Date	End Date	Update
Price Break	163566	Group of Lines	AS54888	Ea	08-Jun-2005		

[Cancel](#) [Apply](#)

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2. To find modifier lines for the selected modifier, select a Search category and enter additional criteria for the selected category:
 - Line Number: Enter a modifier line number.
 - Type: Select a modifier Type to search by: Discount, Price Break, Promotional Goods, and Surcharge.
3. Click Go to display the search results.
4. Click Update to display the **Update Line** page.

Update Line page

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[Price Lists](#) | **Modifier Lists**

[Update Discount List: Modifier Lines](#) >

Update Line: 163566

Modifier List	js001	Line Type	Price Break	Cancel	Apply
Line Number	163566	Currency	USD		

[Controls](#) [Products](#) [Benefits](#) [Qualifiers](#)

Start Date	<input type="text" value="08-Jun-2005"/> <small>(example: 24-May-2005)</small>	Incompatibility	<input type="text"/> <input checked="" type="checkbox"/> Apply automatically <input type="checkbox"/> Allow Benefit Override
End Date	<input type="text"/>		
Modifier Level	LINEGROUP		
Pricing Phase	<input type="text" value="All Lines Adjustment"/>		
Bucket	<input type="text" value="Pricing Adjustments Bucket 1"/>		

[Controls](#) [Products](#) [Benefits](#) [Qualifiers](#)

[Cancel](#) [Apply](#)

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5. Select the Controls tab to update controls that define how the modifier line is applied such as the Start/End Dates, Pricing Phase, Bucket, and Incompatibility Levels. See Defining Controls for Modifier Lines (HTML Interface), page 3-54.
6. Select the Products tab to update information related to the selected product such as UOM and Precedence. You cannot update the Product Level or Product in the update mode.

Products tab

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[Price Lists](#) | **Modifier Lists**

[Update Discount List: Modifier Lines](#) >

Update Line: 163566

Modifier List	js001	Line Type	Price Break	Cancel	Apply
Line Number	163566	Currency	USD		

[Controls](#) | **Products** | [Benefits](#) | [Qualifiers](#)

Product **Item Number** AS54888
 Product Description **Sentinel Standard Desktop**
 UOM
 * Precedence

▼ Pricing Attributes

Pricing attributes further define how you want to price the product. An example is 'Color is Red' where 'Attribute' equals 'Color' and 'Value' equals 'Red'.

Attribute	Context	Operator	Value From	Value To	Remove
<input type="text"/>		Is	<input type="text"/>	<input type="text"/>	

[Add Another Row](#)

Price Break Benefits

Adjustment Type	Discount	Net Amount Calculation	<input type="text"/>
Volume Based on	Item Amount		
Volume Method	Point		

[Controls](#) | [Products](#) | **[Benefits](#)** | [Qualifiers](#)

7. In the Pricing Attributes region (if applicable), you can update, add, or remove pricing attributes related to the product.
8. In the Price Break Benefits region (if applicable), you can update the Adjustment Type, Volume Based on, Volume Method, and related fields.
9. Select the Benefits tab to update the benefit information for the modifier line such as Value From/To, Adjustment Value, Adjustment Method, and Formula. For example, you could change the Adjustment Value from 10 to 15 for the Adjustment Method of Percent.

Benefits tab

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Price Lists | **Modifier Lists**

[Update Discount List: Modifier Lines](#) >

Update Line: 163566

Modifier List **js001**

Line Number **163566**

Line Type **Price Break**

Currency **USD**

[Cancel](#) [Apply](#)

[Controls](#) [Products](#) [Benefits](#) [Qualifiers](#)

* Indicates required field

Adjustment Type **Discount**

Volume Based On **Item Amount**

Volume Method **Point**

*Value From	*Value To	*Adjustment Value	Adjustment Method	Formula		Remove
1000	2000	10	Percent			
2001	3000	12	Percent			
3001	4000	14	Percent			

[Add Another Row](#)

[Controls](#) [Products](#) [Benefits](#) [Qualifiers](#)

[Cancel](#) [Apply](#)

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10. Select the Qualifiers tab to update qualifiers and qualifier groups currently associated with the modifier line. You can update the qualifier information, add new qualifiers by clicking Create Qualifier, or append qualifier groups by clicking Append Group.

Qualifiers tab

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Home

Lists

Price Lists | **Modifier Lists**

[Update Discount List: Modifier Lines](#) >

Update Line: 163566

Modifier List **js001**

Line Number **163566**

Line Type **Price Break**

Currency **USD**

Cancel

Apply

Controls

Products

Benefits

Qualifiers

You can add qualifier conditions by clicking on "Create Qualifier". If you want to add a predefined set of qualifiers, click on "Append Group".

Append Group

Create Qualifier

Qualifiers	Context	Operator	Value From	Value To	Start Date	End Date	Update	Delete
No data exists.								

Qualifier

Qualifiers are eligibility conditions that must be met before a price list or modifier can be applied. Qualifier Groups are pre-existing qualifier conditions that can be reused on price lists or modifiers.

Controls

Products

Benefits

Qualifiers

Cancel

Apply

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11. After you have completed all your updates, click Apply to save your changes.

Related Topics

Creating Modifier Lines (HTML Interface), page 3-53

Updating a Qualifier (HTML Interface), page 2-7

Appending a Qualifier Group (HTML Interface), page 2-8

Deleting a Qualifier (HTML Interface), page 2-7

Redeeming Accruals

You can mark accrued price adjustments as redeemed and record redemption transaction information. In addition, you can unredeem coupons recorded as redeemed in error.

To redeem accruals:

1. Navigate to the Redeem Accruals window.

Note: You cannot create an accrual record in this window.

Redeem Accruals window

The screenshot shows a window titled "Redeem Accruals" with a table containing the following columns: Customer, UOM, Quantity, Redeem, Transaction Reference, and Payment System. The table has several rows, each with a checkbox in the Redeem column. The window also includes a scroll bar on the right and a status bar at the bottom.

2. Do a query to retrieve the accruals. For example, query by Customer name to find all unredeemed accruals for that customer. The window only displays accrual records that the pricing engine created.
3. Select the accrual record.
4. Do the following steps for each accrual that you want to redeem:

Note: You cannot mark an accrual record as partially redeemed. For example, a customer purchases a computer and accrues 100 air miles. You cannot mark 60 air miles redeemed at one time and 40 air miles redeemed at a later time.

5. Select the Redeemed box.
6. Enter the Transaction Reference number for the system that redeemed the accrual.
7. Enter the Payment System that issued the payment for the accrual.
8. Enter the Redeemed Date (the default is the current date).

Alternately, to mark a redeemed accrual record as unredeemed, clear Redeemed. Verify that the Transaction Reference, Payment System, and Redeemed Date fields are blank.

9. Save your work.

Changing Modifier Incompatibility

When you create modifier lines, you assign a phase and then assign an incompatibility group to each modifier line. Multiple incompatibility groups can be assigned to each pricing phase. Since the pricing business rules allow the pricing engine to apply only one modifier for each incompatibility level and phase combination, it must resolve incompatibilities. You can review and change incompatibilities in the Incompatibility Groups window. For each incompatibility group within a specific phase, you can view the modifier lines assigned to one incompatibility group and then re-assign them to another.

Note: If you are unable to access or update this window, you may not have the appropriate access privileges. Consult your Pricing Administrator.

Incompatibility Processing: Precedence

During the phase List Line Base Price, if the pricing engine selects more than one eligible price list line in the desired unit of measure, it resolves the incompatibility by picking the price list line having the highest precedence (lowest precedence number) and uses it as the base price of the item.

The pricing engine uses Precedence for incompatibility processing to select the list price from a price list. In the pricing phase List Line Base Price, regardless of the value of the Incompatibility code at the User level, the pricing engine picks up the list price based on Precedence only.

Note: Use the Event Phases window to set the Incompatibility Resolve Code for a phase.

Incompatibility Processing: Base Price

For the phases, List Line Adjustment, All Line Adjustments, and Header Level Adjustments, if the pricing engine selects more than one eligible modifier, it resolves the incompatibility using best price processing.

Best price processing instructs the pricing engine to select the modifier that offers the lowest price to the customer. For non-monetary modifiers, the pricing engine uses the estimated general ledger value of the modifier as the value of the modifier.

During precedence processing if two or more modifiers tie based on precedence processing, then the engine resolves using best price processing WITHOUT going below the established precedence.

The following table shows an example of the pricing engine using precedence to resolve incompatibilities. The Engine Applies column indicates whether the pricing engine selects the modifier.

Modifier	Phase	Incompatibility Level	Precedence	Engine Applies
10% discount	30	1	260	No
\$100 promotion	30	1	240	Yes
Free promotional good	30	2	260	Yes
\$50 lumpsum	30	3	200	Yes
3% discount	30	3	240	No
25 currency unit deal	40	1	260	Yes

Note: Refer to the phase event mapping discussion to learn how to set phase incompatibility resolution.

Freight and Special Charges modifier and Incompatibility Processing

Incompatibility processing considers all the modifier types such as Freight and Special Charges and evaluates them as a single entity. Once the incompatibility processing is complete, only one modifier remains which may or may not be the Freight and Special Charge modifier type depending on the incompatibility setup.

Note: For Freight/Special Charges: If an Incompatibility Group is not selected for the modifier line, then the pricing engine will use Best Price incompatibility processing instead of Precedence. The type of engine processing can be defined in the Incompatibility Resolve Code field in the Event Phases window.

Exclusive Modifiers and Incompatibility Processing

You can create one exclusive modifier in each pricing phase. When the pricing engine encounters an exclusive modifier, it suspends incompatibility pricing for the phase and applies only the exclusive modifier.

To change modifier incompatibility:

1. Navigate to the Incompatibility Groups window.

Incompatibility Groups window

Phase Sequence: 80
Phase Name: Modifiers for BOOK Event
Incompatibility Group:

Phase Lines

Incompatible Group	Modifier Name	List Type	Line Number	Line Type	Applic
LVL 2	KK-Disc-Modifier01	Discount List	126564	Discount	Amou
	JS1	Promotion	2510	Price Break I	
	VBR005	Freight and S	INSURANCE_OR	Freight/Spec	Lump

Modifiers

2. Click the Search icon to display the Find Incompatibility Groups window (if you are in a blank Incompatibility Groups window). Alternately, do a search: View > Query by Example > Enter. Select your search criteria to find modifier lines associated with a particular phase or those assigned to a particular Incompatibility Group:
 - Phase Sequence
 - Phase Name

- Incompatibility Group

Note: If you search for a phase without specifying an Incompatibility Group, the search returns all modifier lines for this phase, even those not assigned with an incompatibility group.

3. Click Find to view the search results in the Incompatibility Groups window.
4. To update the Incompatibility Group for a modifier, select a different group from the Incompatible Group column.
5. Alternately, select the modifier and click Modifier to display the modifier details in the Advanced Pricing - Define Modifier window.
6. In the Modifiers Summary tab, select a different Incompatibility Group (if desired).
7. Save your work.

Archiving and Purging Modifiers

You can archive pricing entities such as modifiers and modifier lines by copying pricing data from the pricing application tables to archive tables for long-term data storage. Pricing data that is archived into the permanent pricing archive tables is deleted from the pricing application tables.

By archiving and purging records, the number of pricing records that need to be queried or processed by the pricing engine is reduced, potentially resulting in improved performance.

When the archived data is no longer required or does not need to be retained for legal retention purposes, then you can use the purge feature to purge the data from the archive tables.

Related Topics

Archiving Pricing Entities, page 6-2

Purging Pricing Entities, page 6-6

Using the Pricing Organizer

You can manage and track your modifiers more effectively by using the Pricing Organizer to create simple or complex queries (searches). The Find Modifier window enables you to create queries using modifier setup information to find information essential to your business such as:

- All the active automatic promotions for customer A for a given source system.
- All the active promotions for customers within the Western region for the month of May.
- All discounts for item A that customer B is qualified for.
- All promotions that will end by May 31st for a given customer
- All modifiers that use price list A as a qualifier.

- All modifiers for my product category that customer C is eligible for if they ask for the promotion.

Once the search results are returned, you can view a modifier summary or details about a particular modifier.

The resulting query, but not the search results, can be saved as a *personal* query which is not shared with other users or a *public* query that can be shared with other users. This enables you to re-run the query without having to re-enter the query criteria.

You can also rename an existing query or delete it when it is no longer required. From the Modifiers window, you can create new modifiers as well.

Process Flow for Querying and Displaying Modifiers

The following process flow summarizes the main steps involved in querying and displaying modifiers:

1. Enter the query criteria in the Find Modifiers window.
If you have previous query criteria in the fields, you can clear any existing queries from all tabs by clicking Clear.
2. Click Find to run the query and display the results in the Modifier Organizer window.
3. The modifiers at the Header tab or the Lines tab can be selected and opened.
4. You can save the query criteria by a name in the public or private folder.
5. You can create a new modifier by selecting the New Modifier button from the Find Modifiers or Modifier Organizer window.

Note: If Pricing Security is ON, a user with View Only access privilege can view modifier information if it displays in the search results. Maintain privilege is required to make any changes.

To create a new modifier from the Pricing Organizer window:

1. If the modifier you need does not exist, click New Modifier in the Find Modifiers window to display the Advanced Pricing - Define Modifier window.
Alternately, click the New Modifier button from the Headers or Lines tab of the Modifier Organizer window to display the Advanced Pricing - Define Modifier window.
2. Enter information for the new modifier.
3. Save the modifier.

Creating Queries in the Find Modifiers window

You can create a modifier query in the Find Modifiers window to find specific modifiers and related modifier lines. You can select search criteria from one tab or across multiple tabs in the Find Modifiers window.

When you have completed your entries in the following tabs, click Find to start the query. After the results display in the Modifier Organizer window, select a modifier header or line detail from the Headers or Lines tab to view the modifier details. You can open a specific modifier from the Modifier Organizer window.

You can enter your query criteria across the following tabs in the Find Modifiers window:

Header tab

1. Select the Header tab.

Note: If a field is left blank, it is not included as a query criteria. You can enter your query criteria in one tab or across multiple tabs depending on your query requirements. To narrow the search results, specify additional query criteria.

Find Modifiers window: Header tab

The screenshot shows the 'Find Modifiers' window with the 'Header' tab selected. The window has a title bar with 'Find Modifiers' and standard window controls. Below the title bar is a tabbed interface with tabs for 'Header', 'Lines', 'Additional Lines Criteria', 'Product Attributes', 'Pricing Attributes', and 'Qualifiers'. The 'Header' tab is active, displaying a form with the following fields:

Type	Deal	Parent No	offer005
Number		Parent Version	
Name		Active	No
Version		Ask For	No
Currency		Source System	QP
Last Updated By	222	Order Date Exist	No
Last Update Date	22-MAY-2002	Ship Date Exist	No
<input type="checkbox"/> Exact Effective Date Match			
Effective From	21-MAY-2002	-	
Effective To		-	

At the bottom of the window are three buttons: 'Clear', 'New Modifier', and 'Find'.

2. Select only the criteria required for your query:

Field Name	Description
Type	Query by a modifier Type such as Deal, Discount List, Freight and Special charge List, Promotion, or Surcharge List.
Parent No	Query by a Parent No.
Number	Query by the modifier Number.
Parent Version	Defaults if Parent No is selected.
Name	Query by the modifier Name.
Active	Select Yes to query modifier lists that are currently Active or No to query inactive modifier lists
Version	Query by a specific Version of the modifier.
Ask For	Select Yes to query for modifiers that are Ask For or No for modifiers that are not Ask For.
Currency	Select the Currency. If left blank, the search returns all currency modifiers. To query a non -currency defined modifier, select OPT CURR.
Source System	Query for modifiers created by the selected Source System.
Last Updated By	Query for modifiers last updated by the selected value.
Order Date Exist	Select Yes to query for modifiers where an order is defined or No to query for modifiers without any order dates entered.
Last Update Date	Query for modifiers by the last updated modifier date.
Ship Date Exist	Select Yes to query for modifiers with an existing ship date is defined or No to query for modifiers without any ship dates entered
Exact Effective Date Match	When the Exact Effective Date Match is selected, only modifiers with the matching dates specified in the Effective From/To are returned.
Effective From/To	Enter Effective From and To dates to query modifiers whose Effective From/To dates are within the selected date range.

Lines tab

1. Select the Lines tab.

Note: You can enter query criteria in one tab or across multiple tabs depending on your query requirements.

Find Modifiers window: Lines tab

The screenshot shows the 'Find Modifiers' window with the 'Lines' tab selected. The window contains two columns of search criteria. The left column includes fields for Modifier No, Level (set to 'Group of Lines'), Bucket, Automatic (set to 'Yes'), Include on Returns (set to 'Yes'), Formula (set to '<ANY FORMULA>'), Comparison Value, Break Type (set to 'Range'), Upgrade Item (set to 'Sentinel Standard'), Last Updated By, Accumulation Attribute (set to 'Blanket Line Quan'), and Effective From/To dates. The right column includes fields for Type (set to 'Price Break Heade'), Pricing Phase (set to 'Header Level Adju'), Incompatibility Group, Override, Accrual, Application Method, Value, Terms Attribute, Terms Value, Last Update Date, and Charge Name. At the bottom, there are three buttons: 'Clear', 'New Modifier', and 'Find'.

2. Select only the criteria required for your query. If the field is left blank, it is not included as a query criteria.

Note: You can enter query criteria for modifier lines in the Lines tab. However, you cannot query the following:

- additional buy items for promotional goods or other item discounts
- get items for promotional goods or other item discounts
- price break lines details

Field Name	Description
Modifier No	Query by Modifier Line Number.
Type	Query by modifier line type. When you query on Coupon Issue, only the coupon issues line is retrieved.
Level	Query by the modifier line level such as Group of Lines, Line, or Order.
Pricing Phase	Query lines for a specified Pricing Phase. Type the Pricing Phase ID rather than the description. Alternately, select the pricing phase from the Pricing Phase list.
Bucket	Query modifier lines assigned to a particular bucket.

Field Name	Description
Incompatibility Group	Query modifier lines associated for a specific Incompatibility Group.
Automatic	Select Yes for modifier lines that have the Automatic box selected and No for modifier lines that do not have Automatic selected.
Override	Select Yes for modifier lines with the Override box selected and No for modifier lines that do not have Override selected.
Include on Returns	Select Yes for modifier lines that have the Include on Returns box selected and No for modifier lines that do not have the Include on Returns box selected.
Accrual	Select Yes for modifier lines that have the Accrual box enabled and or No for modifier lines that do not have the Accrual box enabled.
Formula	<p>Select one of the following:</p> <ul style="list-style-type: none"> No Formula: to query by lines that have no formula attached. Any Formula: to query on modifier lines that have any formula attached regardless of the formula. <p>Select the formula name from the list.</p>
Application Method	Query for modifier lines associated with an Application Method such as Percent, Amount, Lumpsum, and New Price.
Comparison Value	Query for lines for a given Comparison Value.
Value	Query by modifier lines for a given value.
Break Type	Query by a Break Type for the modifier lines such as point or range.
Terms Attribute	Query modifier lines associated with certain terms such as Freight Terms, Shipping Terms, and Payment Terms.
Upgrade Item	Query modifier lines by Upgraded Item.
Terms Value	Query modifier lines with certain Terms Value.
Last Updated By	Query by the last user who updated the modifier.
Last Update Date	Query by the date when the modifier was last updated.
Accumulation Attribute	Query by Accumulation Attribute.
Charge Names	Query by Charge such as Administration Fees, Duty Fees, Export Fees and so on.

Field Name	Description
Exact Effective Date Match	When the Exact Effective Date Match check box is enabled, only modifiers with the matching dates specified in the Effective From/To are returned.
Effective From/To	Enter Effective From/To dates to query modifiers whose Effective From/To dates are within the selected date range.

Examples of Querying by Effective Dates

The following examples show how effective dates can be used in a query. You can enter your search criteria in the following fields:

- Exact Match (check box)
- Effective From
- Effective From (High)
- Effective To
- Effective To (High)

If Exact Date Match is checked, the = (equal to) operator is used for the query. Otherwise >= and <= operators are used for Effective From/To and Effective From/To (High) fields respectively.

For cases other than Exact Date Match, modifiers having NULL values for Effective dates are also selected.

The following modifier setups are used in the query examples below:

Modifier Name	Effective From	Effective To
M1	10-DEC-1999	10-JAN-2001
M2	10-MAR-2001	30-MAR-2002
M3	—	30-APR-2003
M4	—	—
M5	10-MAR-2001	—
M6	19-MAR-2001	10-NOV-2002

Example 1: Finding Modifiers by a) Exact Effective Date Match b) Effective From/To range

The following examples show the query criteria and modifiers retrieved for a query by Exact Date match, and Effective From/To dates:

a) Exact Date match

Select the Exact Effective Date Match box. The Effective From (High) and Effective To (High) fields are grayed out. You can only enter values in the Effective From and Effective To fields. For example, if you enter

- Effective From: 10-MAR-2001
- Effective To: 30-MAR-2002

The modifier M2 will be returned.

b) Effective From/To range

Specify the values in any or all the four fields.

- Effective From: 01-JAN-2001
- Effective From (High): 15-MAR-2001
- Effective To: No Value
- Effective To (High): 01-DEC-2002

The modifiers M2, M4 and M5 are returned.

Example 2: Finding Modifiers by a Single Date-the same date in Effective From (High) and Effective To fields

Enter the same date in Effective From (High) and Effective To fields.

For example, to find all the modifiers effective on 10-MAR-2001, enter

- Effective From (High): 10-MAR-2001
- Effective To: 10-MAR-2001

The modifiers M2, M3, M4 and M5 are returned.

Example 3: Finding Modifiers by Date Range

Enter the low date range in Effective From (High) and high date range in Effective To fields. For example, to find all the modifiers effective between date range 01-JAN-2001 and 10-JAN-2001, enter:

- Effective From (High): 01-JAN-2001
- Effective To: 10-JAN-2001

The modifiers M1 and M4 will be returned. You can also do exact or range date matches to find modifiers by their effective dates.

Additional Lines Criteria tab

1. Select the Additional Lines Criteria tab. You can select query criteria if Coupon Issue, Price Break Header, or Discount was selected as the Modifier Type in the Lines tab or if a modifier type is not selected in the Lines tab. Otherwise, the fields are grayed you cannot make any selections.

Note: You can enter query criteria in one tab or across multiple tabs depending on your query requirements.

Find Modifiers window: Additional Lines Criteria tab

Find Modifiers

Modifier

Header Lines Additional Lines Criteria Product Attributes Pricing Attributes Qualifiers

Benefit Quantity

Expiration Date

Expiration Period

Rebate Transaction Type

Coupon Modifier Number

Benefit UOM

Expiration Period Start Date

Period Type

Accrual Conversion Rate

Accrual Redemption Rate

Clear New Modifier Find

2. Select only the criteria required for your query. If a field is left blank, it is not included as a query criteria.

Field Name	Description
Benefit Quantity	Query by Benefit Quantity.
Benefit UOM	Select a specified UOM such as LBS (pounds) from the list.
Expiration Date	Query by Expiration Date to query modifiers with lines matching the specified expiration date.
Expiration Period Start Date	Query Expiration Start date. This is an exact date match query.
Expiration Period	Query by the Expiration Period.
Period type	Query by a specified Period type.
Rebate Transaction type	Query by a Rebate Transaction type.
Accrual Conversion Rate	Query by an Accrual Conversion Rate when modifier type is Discounts for accrual. Coupon Conversion Rate: For modifier type Coupon, this field displays the Coupon Conversion Rate. Accrual Redemption Rate: Query by an Accrual Redemption Rate. Coupon Redemption Rate: For modifier type Coupon, this field displays the Coupon Redemption Rate.
Coupon Modifier Number	Query by the Coupon Modifier Number if modifier type is coupon.

Product Attributes tab

1. Select one of the following options from the Product Attributes tab.

Find Modifiers window: Product Attributes tab

- **Products:** This enables you to query the specified fields on the window.
 - **No Products:** If this option is selected, the remaining fields on the window are greyed out. The query returns modifier lines that do not have any product attributes defined
 - **Not Specified:** If this option is selected, the remaining fields on the window are greyed out and the query ignores whether a modifier line has product attributes or not. This is the defaulted value and additional query criteria is needed for the query to execute.
2. When Product Attributes field is enabled above, query by Product Attribute.

Note: The Product Attribute Value can be entered only after a Product Attribute has been selected.

If you select Products in the Product Attributes field, you can also query by Exclude Items.

3. Enter one or more Exclude Items in the Exclude Items region.

The query retrieves modifiers that have that item defined as an Exclude Item. If more than one exclude product is selected, then modifiers with at least one of the Exclude Items defined are retrieved.

Note: When querying by an item, the query results will return modifier lines that specify the item number and not include modifier lines for item category.

Pricing Attributes tab

1. Select the Pricing Attributes tab.

Find Modifiers window: Pricing Attributes tab

2. Select one of the following options from the Pricing Attributes field:
 - **Pricing Attributes:** This option enables the query fields on the window. Enables you to query by one or more combinations of Pricing Context/Attributes. For example, you could query by Volume (Pricing Context) and Total Item Quantity (Pricing Attribute). If no values are entered, the query returns only those modifiers with at least one product attribute.
 - **No Pricing Attributes:** If this option is selected, the remaining fields on the form are greyed out. The query will return modifier lines that do not have any pricing attributes defined.
 - **Not Specified:** If this option is selected, the remaining fields on the window are greyed out and the query ignores whether a modifier line has Pricing Attributes or not. This is the defaulted value and additional query criteria is needed to run the query.
3. Select Pricing Attributes in the Pricing Attributes field to query by pricing context. The Pricing Attribute field is enabled if a Pricing Context is selected. The Pricing Attribute Value is enabled only after a Pricing Attribute has been selected.
4. Select an operator value such as = or BETWEEN. The Value To field is grayed out if the Operator value is =.

If the operator value is left blank or is BETWEEN, the query evaluates the values in the Value From and Value To fields to determine if there is an exact match.
5. You can specify up to 3 pricing attributes with a combination of OR/AND operators.

Examples of using AND/OR Operators to query Pricing Attributes

The following table displays modifiers named M1, M2, M3, and M4 and their pricing attributes:

Modifier Name	Pricing Attributes
M1	Blue, Large, and Grade A
M2	Blue
M3	Large
M4	Blue and Grade A

The following table displays the results for a query by Pricing Attributes. The query results depend on the AND/OR operator criteria selected: *Yes* means the modifier is retrieved and *No* means it is not.

Conditions	M1- Blue, Large, and Grade A	M2 - Blue	M3 - Large	M4 - Blue and Grade A
OR/OR	Yes (Blue/ Large/ grade A)	Yes (Blue)	Yes (Large)	Yes (Blue/Grade A)
AND/AND	Yes (Blue, Large, and Grade A)	No (not Blue and Large and Grade A)	No (not Blue and Large and Grade A)	No (not Blue and Large and Grade A)
OR/AND	Yes (Blue/Large and Grade A)	Yes (Blue)	No (not Large and Grade A)	Yes (Blue)
AND/OR	Yes (Blue and Large/Grade A)	No (not Blue and Large)	No (not Blue and Large)	Yes (Grade A)
Null PA1, And/ OR	Yes (Large/Grade A)	No (no PA's)	Yes (Large)	Yes (Blue/Grade A)

Qualifiers tab

1. Select the Qualifiers tab.

Find Modifiers window: Qualifiers tab

The screenshot shows the 'Find Modifiers' window with the 'Qualifiers' tab selected. The window contains three rows of qualifier fields. The first row is filled with the following values: Qualifier Context1: 'Customer', Qualifier Attribute1: 'Customer Name', Operator1: '=', Value From1: 'World of Business', Value To1: (empty), Effective From1: '31-MAY-2002', Effective To1: '25-JUL-2002'. The second and third rows are empty. The window also has a 'Clear' button, a 'New Modifier' button, and a 'Find' button at the bottom.

2. Select one of the following options from the Qualifiers tab:

- Qualifiers: This option enables you to query the fields on the window:

Qualifier Field Name	Value
Qualifier Context	Customer
Qualifier Attribute	Customer Name
Operator	= (exact match)
Value	World of Business

- No Qualifiers: If this option is selected, the remaining fields on the window are greyed out. The query retrieves modifier lines that do not have any qualifier attributes defined.
 - Not Specified: If this option is selected, the remaining fields on the window are greyed out and the query ignores whether a modifier line has a qualifier attribute or not. This is the defaulted value and additional query criteria is needed to run the query.
3. Select Qualifiers in the Qualifiers field to query by qualifier context. The Qualifier Attribute field is enabled if a Qualifier Context has been selected. The Qualifier Attribute value is enabled only after a qualifier attribute is selected. Otherwise, the fields are grayed out and you cannot specify any qualifier values.
 4. Select one of the following operator values: =, BETWEEN, or NOT=. If you select the = or NOT= operator, the Value To field is grayed out.

- For an exact match choose =. For a range of values, select BETWEEN. If you want to filter out values for a given range select NOT=.

If the operator is left blank or BETWEEN, the query evaluates the values in the Value From and Value To fields to determine if there is an exact match.

- Select the Exact Effective Date Match box to retrieve modifiers with the dates specified in Effective From/To.
- You can specify up to 3 qualifiers by selecting the OR/AND operators.
- Examples of using AND/OR operators to query Pricing Qualifiers**

You can select up to three qualifiers by specifying the OR/AND operators:

- Q1=Customer Name
- Q2= Order Type
- Q3 = Ship To

Conditions	Modifier 1 - Cust Name, Order Type, & Ship To	Modifier 2 - Customer Name	Modifier 3 - Order Type	Modifier 4 - Cust Name and Ship To
OR/OR	Yes (Customer Name/Order Type/Ship To)	Yes (Customer Name)	Yes (Order Type)	Yes (Customer Name/Ship To)
AND/AND	Yes (Customer Name and Order Type and Ship To)	No (not Customer Name and Order Type and Ship To)	No (not Customer Name and Order Type and Ship To)	No (not Customer Name and Order Type and Ship To)
OR/AND	Yes (Customer Name/Order Type and Ship To)	Yes (Customer Name)	No (Not Order Type and Ship To)	Yes (Customer Name)
AND/OR	Yes (Customer Name and Order Type/ Ship To)	No (not Customer Name and Order Type)	No (not Customer Name and Order Type)	Yes (Ship To)
Null Q1, And/ OR	Yes (Order Type/Ship To)	No (No Q1)	Yes (Order Type)	Yes (Ship To)

Running the Modifier Query

After the query criteria has been selected, you can run the query to retrieve the search results. If a modifier matches *all* the specified search criteria, the modifier is retrieved and displayed in the Modifier Organizer window.

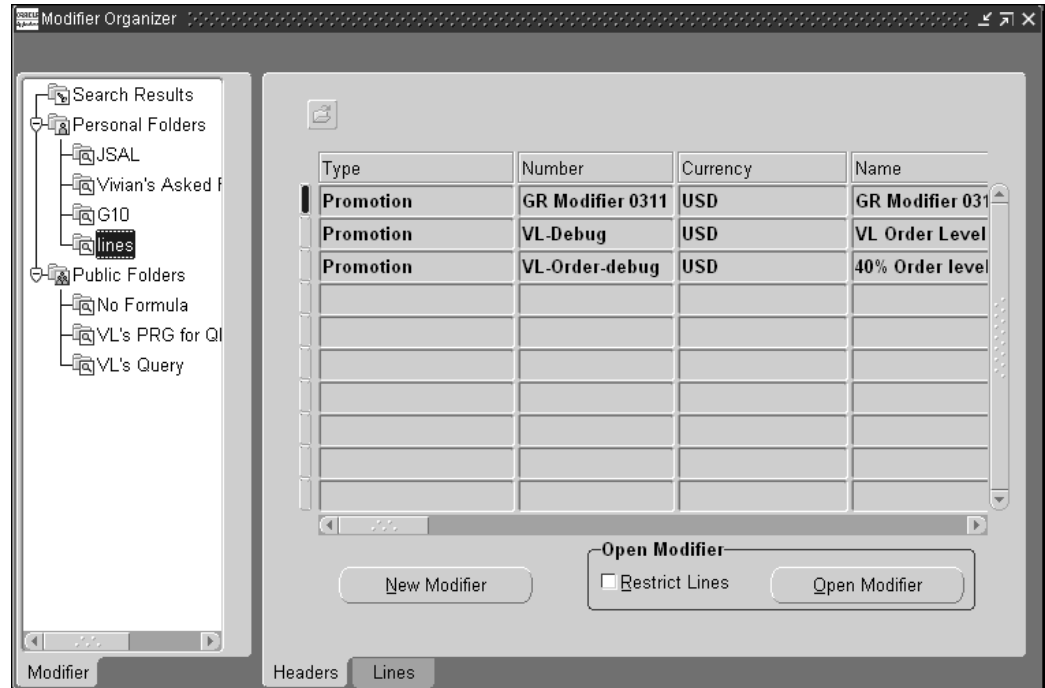
To run a modifier query:

- From the Find Modifiers window, click Find to run the query. At least one query criteria must be entered to run the query.

Note: Alternately, to run a saved query, just double-click the query name. The saved query names are displayed in the Personal or Public folders in the Modifier Organizer window.

2. The search results display in the following tabs of the Modifier Organizer window:
 - Header tab: Displays a summary of the modifiers' header information.
 - Lines tab: Displays a summary of modifier line details provided at least one query criteria has been entered in the Lines, Additional Lines, Products, Pricing Attributes, or Qualifiers tab.

Modifier Organizer window



The following table summarizes what modifier level displays (header or line) when you enter your query criteria in the tabs (Header, Lines and so on).

Query Criteria	Display Header	Display Lines
In Header	X	n/a
In Lines	X	X
In Header and Lines	X	X
Qualifiers on Header	X	n/a
Qualifiers on Lines	X	X
Qualifiers on Headers and lines	X	X
Products Line	X	X
Pricing Attributes	X	X

Opening a Queried Modifier (from the Pricing Organizer)

You can select a record from either the Headers or Lines tabs to view more details.

- Select a modifier in the Headers tab, and click Open Modifier to display modifier details.
- Select a modifier line in the Lines tab and click Open Modifier to display the current modifier for the selected modifier line.

The modifier displays in the Advanced Pricing - Define Modifier window.

Note: If you select Restrict Lines and click Open Modifier, only those lines that meet the query criteria on the Find Modifiers window are displayed. They display in the Modifiers Summary tab of the Advanced Pricing - Define Modifier window.

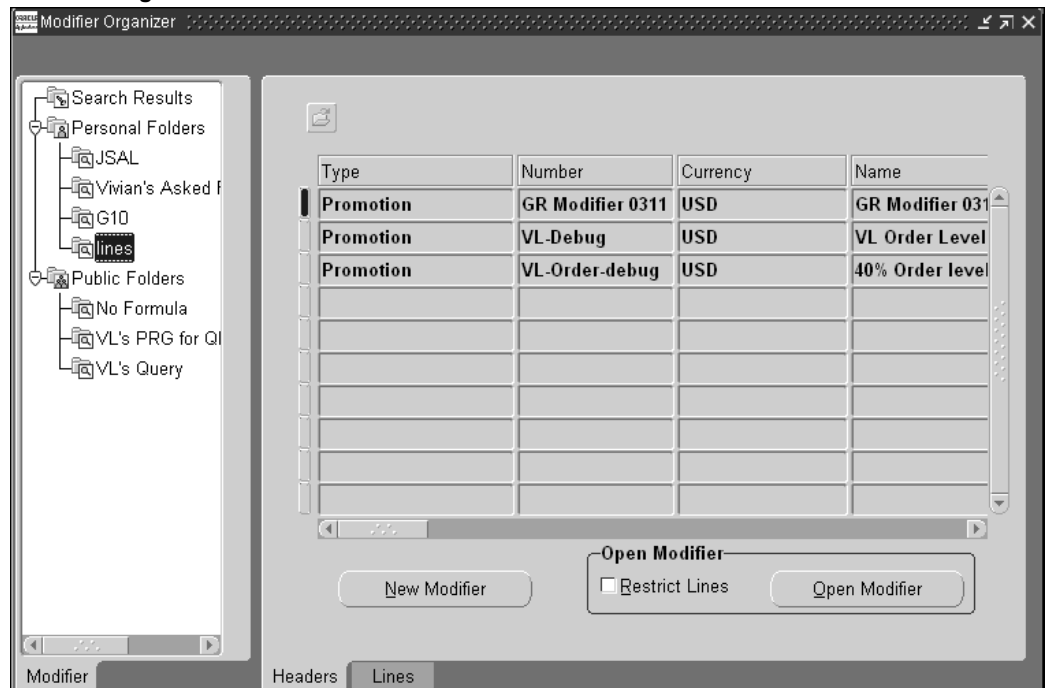
Saving a Modifier Query

You can save frequently-used queries and run them by simply double-clicking the saved query name. The query can be saved as either a Personal or Public query: a *Personal* query is not shared while a *Public* query is shared with other users. When saving a query, select the Public check box to save it as a public query in the Public Folder; otherwise it is saved as a personal query in the Personal Folder.

To save a modifier query

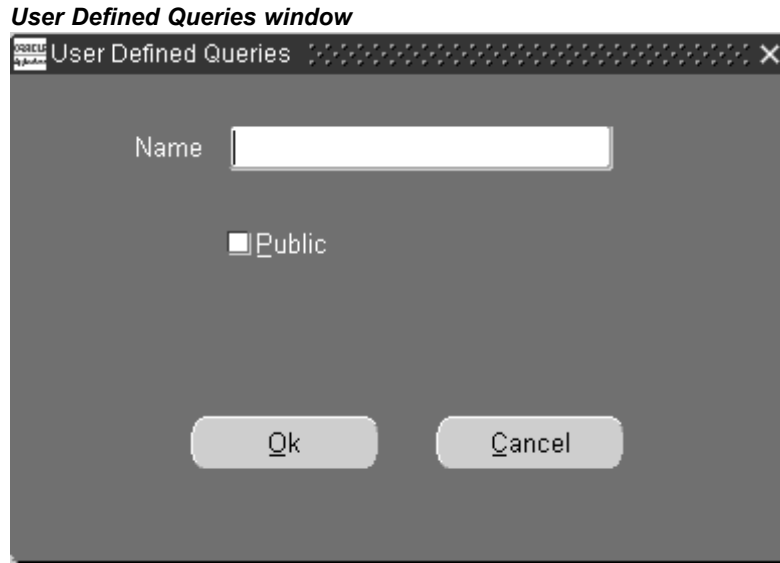
1. Do a query in the Find Modifiers window to display the search results in the Modifier Organizer window.

Modifier Organizer window



2. Right-click the Search Results folder in the left pane to display the menu.

3. Choose Save to display the User Defined Queries window.



4. Enter a Name for the query.
5. Select Public to save the query as a Public query that can be shared with other users. Otherwise, it is saved as a Personal query.
6. Click OK to save the query.

Maintaining a Modifier Query

Once you have saved your queries, you can rename an existing query, move queries between Public and Personal folders, or delete a query that is no longer required.

Note: A public query can be renamed, moved from Public to Personal folder, or deleted only if the value of the profile option QP: Administer Public Queries is set to Y (Yes).

To rename a saved modifier query:

1. Find the saved query to be renamed in either the Personal Folders or Public Folders.
2. Right-click the query name to display the menu, then choose Rename Query to display the User Defined Queries window.
3. Enter the new name and click OK.

To move a saved query between the Personal or Public folder:

1. Find the saved query to be moved in either the Personal Folders or Public Folders.
2. Right-click the query name to display the menu, then choose Rename Query to display the User Defined Queries window.
3. Select or clear the Public box and click OK. The selected query has now moved over.

To delete a modifier query:

1. Select the query to be deleted in either the Personal Folders or Public Folders.

2. Right-click the query name, then select Delete to display the Decision window.
3. In the Decision window, click Yes to delete or No to return to the Modifier Organizer window.
4. Save your work.

Overview of Promotional Limits

Oracle Advanced Pricing enables you to set limits for benefits that a customer can receive for a promotion, deal, or other modifier. By limiting the amount of a benefit that can be received, you can keep promotional spending within budget and prevent promotion budget overruns.

Note: To use limits, Oracle Advanced Pricing must be installed and the profile option *QP: Promotional Limits Installed* must be set to Yes by the System Administrator.

Note: If you are unable to access the promotional limits windows or make updates, you may not have the appropriate access privilege. You must have at least View Only privileges to view. To make any changes or updates to the windows, you must have Maintain privileges. Consult your Pricing Administrator.

For example, promotional limits could be used to provide a 10% discount on the first 500 units of an item sold, or a 10% discount for an item until the promotional limit is reached; for example, once the promotion reaches \$100,000.

In addition to setting limits on promotional spending, you can also monitor current and cumulative promotional spending in real time, order by order.

You can set limits for a specific monetary value such as the first \$500 or by a specific category such as a customer. Oracle Advanced Pricing enables you to set limits in terms of accrual units, discount cost, gross revenue, item quantity, and usage (by customer, by promotion, by promotion and customer). Within a promotion, deal, or modifier, you can also set eligibility for limits by customer, product, or other entity:

- Customer: Define a limit by customer, a group of customers, or at any level in your customer hierarchy.
- Product: Define a limit for a product or group of products in your product hierarchy.

If multiple organizations exist for your corporation, you can set a different limit for each sales organization, group of organizations in your company hierarchy, or give the same limit for all. When entering a limit, you can select if you want to consider to set this limit

- By organization
- Across all organizations
- For a specific organization.

You can define a limit across the current transaction or across all transactions to which a promotion or modifier has been applied.

Note: You cannot create line limits in the following situations:

- If the Modifier line type is Other Item Discount, Promotional Goods, Coupon Issue, Item Upgrade or Term Substitution.

- If the Automatic box is cleared so that the modifier line must be manually applied.
- If the Override box is selected.

Creating Limits

Oracle Advanced Pricing enables you to create monetary or usage limits that a customer can receive for a promotion, deal, or other modifier.

Limits not copied to new modifier: If copying a modifier, existing limits at either the line or header level, are not copied from the original modifier to the new modifier. The promotional limits must be created again for the new modifier.

Note: To use limits, Oracle Advanced Pricing must be installed and the profile option QP: Promotional Limits Installed must be set to Y (Yes) by the System Administrator.

You can create limits at the:

- Modifier header level for a promotion, deal, or modifier list.
- Modifier line level: Limits can be applied to line modifiers and applied to a line, group of lines, or order.
- Both Modifier header and line levels. However, line limits cannot be created if the Modifier Type for the modifier line is Other Item Discount, Promotional Goods, Coupon Issue, Item Upgrade, or Term Substitution.
 - The Automatic check box for the modifier line must be enabled, and the Override Flag must be cleared otherwise you cannot enter a limit for the modifier.
 - If no Product UOM was defined for the modifier line, line limits with basis of *Item Quantity* will not get created. If no Benefit UOM was defined for a Modifier Line, line limits with basis as *Accrual Units* will not get created.
 - If no Benefit or Product UOM is defined for a modifier line, neither Item Quantity or Accrual Units displays in the Basis list of values (LOV) and line limits cannot be created for that line.

You can define header and line level limits in terms of accrual units, discount cost, gross revenue, item quantity, and usage (by customer, by promotion, by promotion and customer). The limit can be defined by a specific value or a limit for each element that receives a promotion; for example, a limit of \$100 for each customer. The following examples illustrate different ways limits can be applied:

Customers

You can define limits for all individual customers, group of customers, or specifically named customers; for example:

- No more than \$100 of benefit to any one customer on any order from promotion Y.
- Customer XYZ is limited to \$1000 cumulative benefit from promotion X.
- All VIP customers are limited to \$2000 cumulative benefit.

Individual stock-keeping units (SKU's) or groups of SKU's

You can define limits for individual SKU's or groups of SKU's that are being promoted; for example:

- Limit aggregate expense for promotion X to \$50,000 for item 1234.
- Limit VIP customers to \$2000 cumulative benefit.

Individual or aggregated transactions

You can define limits that apply to individual transactions or aggregated transactions; for example:

- Limit customers so they cannot exceed \$50 for any order.
- Limit customers' use of promotion X for either \$400 cumulative discount or placing an order 3 times.
- Limit the total expense that customers may receive from a fall promotion to \$5000.

When setting up a limit, you must select a *basis* that defines the unit being monitored for limit checking. Available limit bases are accrual units, charge amount, cumulative discount amount, gross revenue, item quantity, and usage.

For example, if accrual units were used as the *basis* for monitoring units such as air miles, the limit would monitor the number of air miles accrued.

Note: If the effective end date for a modifier has been reached, you can still attach limits. However the modifier and associated limit will not be applied if the limit date is expired.

To create limits at the modifier header level or line level:

1. Navigate to the Advanced Pricing - Define Modifier window.
2. Click List Limits to enter a limit at the modifier header level, or click Line Limits to enter a limit at the modifier line level. The Automatic box for the modifier line must be enabled so that the List Limits button or Line Limits button can be clicked.

Define Limits window

Num	Basis	Enforced	Amount	Unit	By Organization	Constraint 1	Context 1
1	Gross Revenue	Across all T	5000000	USD	<input type="checkbox"/>		
					<input type="checkbox"/>		
					<input type="checkbox"/>		

Consumed	Available	Org Context	Org Attribute	Org Value	Org Meaning
500000	4500000				

Buttons: Transactions.., Update balance, Other Attributes

Note: The following conditions must be fulfilled before you can enter limits for a modifier line:

- At least one line modifier must be listed in the Modifiers Summary tab before entering a line limit. Otherwise the Line Limits button is grayed out.
- You can only create Line limits for the following modifier types: Discount, Price Break Header, and Surcharge. Line limits cannot be created for the following Modifier Types: Other Item Discount, Promotional Goods, Coupon Issue, Item Upgrade, or Term Substitution.
- The Automatic box for the modifier line must be selected, and the Override Flag must be cleared otherwise you cannot enter a limit for the modifier.

3. The Num is a unique limit number that defaults automatically to identify the limit transaction.
4. Select the Basis for the limit. The basis defines the type of limit that is applied and how the consumption is measured. For example, if the basis is Accrual Units, the limit is calculated by the number of units accrued such as 4000 air miles. You can select from the following available bases:
 - Accrual Units: For example, each customer accrues 100 air miles for each 10 currency units spent up to a limit of 5000 air miles per customer.
 - Discount Cost: For example, when the cost of the promotion has exceeded \$50,000, the promotion ends.

- **Gross Revenue:** For example, each customer receives the promotion for the first \$250 that they order from the website.
- **Item Quantity:** For example, a customer receives \$10 off a case of 12 one-gallon cans of orange juice for the first 1000 cases.
- **Usage:** Usage can be based by customer, promotion, or both customer and promotion:
- **Customer:** For example, each customer cannot get a promotion more than 5 times.
- **Promotion:** For example, promotion is available on the first 25 orders placed.
- **Promotion and Customer:** For example, promotion is available to the first 25 different customers who place an order.

When a pricing request is processed, the pricing engine checks each request against the limit to see if it exceeds the limit and applies the amount of the benefit against the limit.

5. Select how you want the limits enforced:
 - Select Across the Current Transaction if you want the pricing engine to maintain a consumption record for each order that consumes the limit.
 - Select Across All Transactions if you want the pricing engine to maintain one consumption record for all orders that consume the limit.
6. Enter the amount of the limit. You can increase or decrease an existing limit; however, you cannot decrease it lower than the amount by which the limit has been consumed. For example, if two orders each for 100 currency units have consumed the limit, you cannot lower the limit below 200.
7. The Unit field defaults to a unit of measure that corresponds to the Basis selected: for example, a currency unit such as USD (US dollars) for Gross currency.
8. Select a constraint to restrict the limit to a product or qualifier attribute:
 - Select Product Attribute to set limits for a specific product(s).
 - Select Qualifier Attribute to set limits for a qualifier such as a customer, modifier list, or order.
9. To filter limits by sales organization, select By Organization. If enabled, the organization for the transaction and modifier must match before the limit can be applied. This enables you to restrict limits to transactions for your organization.

Note: Even if the transaction is ineligible to receive the limit, it may be eligible to receive the modifier.

10. You can select additional criteria from the Constraint, Context, and Attribute fields to restrict eligibility for limits by certain products or qualifiers. For example, the following setup can be used to define eligibility by customer name:

Constraint	Context	Attribute
Qualifier Attribute	Customer	Customer name

- Select Constraint 1 which can be either a product or qualifier attribute.

- Select a Context for the product or qualifier constraint.
- Select an Attribute for the Context. For example, if the Context is Customer, you can select Customer name as the Attribute to restrict the limit by customer name.
- You can define additional product or qualifier attributes in the Constraint 2, Context 2, and Attribute 2 fields.

Note: If you select Constraint 2, Context 2, and Attribute 2 or additional criteria, an *and* operator is introduced which means that all criteria must be met before the limits are applied.

11. The When Exceeded field determines the handling action if a pricing request exceeds the promotional limit. The initial value automatically defaults from the profile option QP: Limit Exceed Action that is set up by the System Administrator. Optionally, if you do not want the default, you can select a different handling action:

- **Hard - Adjust Benefit Amount:** Adjusts the order benefit amount so that the order meets but does not exceed the promotional limit. For example, if a customer close to their promotional limit places a new order that exceeds the limit amount, the customer receives the benefit only until the amount is reached.
- **Soft - Full Benefit Amount:** Applies the full benefit to the order and then sends a status message to place a promotional hold on the order. For example, if a customer close to their promotional limit places a new order that exceeds their limit amount, under a soft limit the customer gets the full promotion benefit applied to the order. A status message is sent to the calling application (such as order management) that the limit has been exceeded.

12. In the Hold? field, select one of the following hold actions:

- Select Hold? to have a status message sent to the calling application (such as order management) when the limit is exceeded.
- Unable the Hold? box so that the pricing engine does not place a promotional hold.

Note: If the *Soft - Full benefit amount* is selected in the When Exceeded field, then the Hold? box is automatically enabled and cannot be updated.

13. Save your work.
14. Optionally, click Other Attributes to display the Define Attributes window to define additional criteria.

Note: If Balances exist for a limit, the Other Attribute button is grayed out and you cannot add other attributes.

Define Attributes window

Constraint	Context	Attribute	Value	Meaning
Qualifier Attrib	Customer	Customer Name	Autostore Inc.	CL1 CUSTOMER

Cancel OK

15. For example, if you have selected customer and customer name and want the limit applied to a particular customer, select the customer name from the Value field.
16. Save your work.

Note: To qualify for a limit, all the qualifier conditions must be met. Otherwise, the limit will not be applied.

Viewing Limit Balances and Transaction Details

Oracle Advanced Pricing enables you to view balances including the amounts available and consumed (used) for a selected limit or across transaction limits. For a selected balance, you can view the transactions that have consumed the balance. The available balance is calculated using the following formula:

Available balance = Limit Amount - sum of (Consumed Amounts from saved Transactions)

Manual versus Automatic Updating of Limit Balances

For most transactions, limit balances are updated automatically when orders are re-priced or when the limit amount is changed. However, some balances must be manually updated to reflect the new balances: for example, for returned, cancelled, and deleted orders or when a manual transaction is added to adjust limit balances. To update the limit balances manually, you must click Update balances to view the updated balance.

As transactions are processed, cumulative promotional spending is subtracted from the available limit balance. The pricing engine updates the available balance for transactions that complete successfully such as a booked order line or transactions in progress; for example, a sales order line that is entered but not saved or booked.

However, if a transaction in progress was rolled back or exited abnormally from a calling application (for example, Order Management), the balance is still updated and therefore the available limit balance may not reflect the true balance. When this occurs, you must manually update the balance to reflect the true balance.

Once the order or order line is saved and booked, then the available limit balance is reduced by the amount of the completed transaction(s).

To view a limit balance:

1. Navigate to the Define Limits window.

Define Limits window
Define Limits - CAP 101 HARD 4

Num	Basis	Enforced	Amount	Unit	By Organization	Constraint 1	Context 1
1	Gross Reven	Across all T	5000000	USD	<input type="checkbox"/>		
					<input type="checkbox"/>		
					<input type="checkbox"/>		

[Other Attributes](#)

Balances

Consumed	Available	Org Context	Org Attribute	Org Value	Org Meaning
500000	4500000				

[Transactions..](#) [Update balance](#)

The limits and their balances display in the Balances region. If the limit is arranged by category such as sales organizations, product attributes, or qualifier attributes, one limit balance displays for each category.

Note: A limit and sub-limits only appear if transactions have posted against them.

2. The Available field displays the amount of the limit or sub-limit remaining. If the limit is set up by category, then the following Organization (Org) fields display:
 - Org Context: Displays the sales organization for the sub-limit balance.
 - Org Attribute: Displays the product attributes/qualifier attributes for the sub-limit balance.
 - Org Value: Displays the product attributes/qualifier attributes for the sub-limit balance.
 - Org Meaning

To view limit transaction details:

1. Navigate to the Define Limits window.
2. In the Balances section, select the balance whose transaction details you want to view.
3. Click Transactions to display the Define Transactions window.

Define Transactions window

The screenshot shows a window titled "Define Transactions" with a table of transactions. The table has columns: Price Request Dt, Price Req Code, Manual, Amount, Request Type, and Reason. There are two rows of data, both with "28/AUG/2001" as the date and "ONT-MISSING HE" as the code. The first row has a checked "Manual" box, an amount of "150000", and "ONT" as the request type. The second row also has a checked "Manual" box, an amount of "350000", and "ONT" as the request type. The "Reason" column is empty for both rows. There are "OK" and "Cancel" buttons at the bottom right.

Price Request Dt	Price Req Code	Manual	Amount	Request Type	Reason
28/AUG/2001	ONT-MISSING HE	<input checked="" type="checkbox"/>	150000	ONT	
28/AUG/2001	ONT-MISSING HE	<input checked="" type="checkbox"/>	350000	ONT	
		<input type="checkbox"/>			
		<input type="checkbox"/>			

Note: The Define Transactions window only displays if there are transactions applied against the limit. Transactions display after you save a sales order.

4. The following fields are defined:

- Date Request: Display the date the transaction occurred.
- Price Req Code: Displays the pricing code automatically for an Automatic transaction. You can enter a pricing code manually for a Manual transaction.
- Manual: Enabled if a manual transaction has been added. You can update, delete, or add a manual transaction.
- Amount: Displays the amount of the limit consumed.
- Request Type: Displays the name of the calling application such as Order Management.
- Reason: Displays a reason (if applicable) for the transaction. You can enter a manual reason which is used especially in manual adjustments.

Note: In the Define Transactions window, you can choose to adjust the limit balance by manually adding new transactions or updating existing manual transactions. A limit transaction created by the Pricing engine cannot be updated or deleted. Only manual transactions can be added, update and deleted.

Updating an Existing Limit Balance

Oracle Advanced Pricing provides a running available balance so you know the amount consumed (used) and available for a selected limit. Balances for limits are updated automatically when orders are re-priced or when the limit amount is changed.

In certain cases such as returned, cancelled, and deleted orders, the limit balances are not updated automatically and the balance must be manually updated using the Update balances button. If a manual transaction is added to adjust limit balances, you must click Update balance to view the new available limit balance.

To update an existing limit balance:

1. Navigate to the Define Limits window.

Define Limits window

Num	Basis	Enforced	Amount	Unit	By Organization	Constraint 1	Context 1
1	Gross Revenue	Across all T	5000000	USD	<input type="checkbox"/>		
					<input type="checkbox"/>		
					<input type="checkbox"/>		

Consumed	Available	Org Context	Org Attribute	Org Value	Org Meaning
500000	4500000				

Buttons: Transactions.., Update balance, Other Attributes

2. Verify that the balances match the sum of the transactions. Click Update balance or run the concurrent process *QP: Update Limit Balance*.
3. Click Transactions to display the Transactions window. Confirm that the transactions are correctly applied to the balance.
4. To change the limit balance, enter a transaction in the Transactions window. Enter a positive quantity in the Amount field to lower the available balance or use a negative quantity to raise the available balance.
5. Recalculate the balances in the Define Limits window by choosing the Update balance button or by running the concurrent process *QP: Update Limit Balance*.

Enforcing Limits

Oracle Advanced Pricing enables you to set up an enforcement policy to manage transactions if the promotional limits are exceeded. When the benefit amount for a transaction or transaction lines exceed the set limit or available limit balance, the default handling method resolves the situation.

The default limit enforcement is set up by the System Administrator in the QP: Limit Exceed Action profile option. You can accept the default or optionally, select an alternate handling method. The following limit handling methods are available:

- **Hard - Adjust Benefit Amount:** Any partial benefit available will be given up to the limit. A promotion based on Usage (number of times it is given) is considered to be a hard limit.
- **Soft - Full Benefit Amount:** The full benefit of the promotion is given and a message is sent to the calling application to advise that the limit has been exceeded. If a limit is exceeded, then the order header and lines need to be placed on a promotional limit hold until appropriate business processes allow progression of the entire sales

order. These processes may involve adjusting the promotional limits or repricing the order.

In addition to setting hard and soft limits you can also make the following adjustments when the limit is exceeded:

- Adjust the limit up or down while the enforcement is operating.
- Deactivate the promotion or increase the remaining available limit.

Adjusting the Limit Amount

You can increase or decrease an already existing limit for a promotion, deal, or modifier and have the adjustment reflected in the available balance. However, you cannot decrease it lower than the amount by which orders have consumed it. For example, if two orders, each for \$100 have consumed the limit, you cannot lower the limit below \$200.

Note: A limit (header or line level) that has been created by a different source system code cannot be updated or deleted by a user who has logged in using a different source system. For example, if a limit was created for a modifier by a *Trade Management* user, the same limit can only get updated or deleted by a *Trade Management* user. A user logged in Advance Pricing can view limits for the modifier but cannot edit the existing limits.

If the promotion, deal, or modifier is inactive because the limit was previously exceeded, the promotion, deal, or modifier will be re-activated once the limit is increased.

To adjust the limit amount:

1. Navigate to the Define Limits window.

Define Limits window

Define Limits - CAP 101 HARD 4

Num	Basis	Enforced	Amount	Unit	By Organization	Constraint 1	Context 1
1	Gross Reven	Across all T	5000000	USD	<input type="checkbox"/>		
					<input type="checkbox"/>		
					<input type="checkbox"/>		

Other Attributes

Balances

Consumed	Available	Org Context	Org Attribute	Org Value	Org Meaning
500000	4500000				

Transactions.. Update balance

2. Enter the new Amount for the limit. If decreasing the limit, you cannot decrease it lower than the amount by which orders have consumed it.

Formulas

This chapter covers the following topics:

- Overview of Formulas
- Creating a Pricing Formula
- Finding Formula Factor Lines
- Updating Formula Prices

Overview of Formulas

Formulas consist of mathematical expressions that the pricing engine evaluates to calculate the list prices of items and discounts applied to them. Formulas can be linked to a price list line or modifier line. You can use formulas to:

- Create a price from a computation as an alternative to entering prices in a price list.
- Calculate a price adjustment. For example, you can instruct the pricing engine to calculate a discount by attaching a formula to a discount line.
- Set up and maintain formulas based on component types.

When you attach a formula to a price list line, you typically do not enter a price for that line because the pricing engine uses the formula to calculate the final list price of the product or service. One exception is a formula that has a list price as Formula Type: in this case, you must enter the list price (base price) for the formula to use in its calculations.

Note: You can attach a formula that has a List Price component to price list lines and to modifier lines. For more information, see: *Oracle Advanced Pricing User's Guide*, Price Lists and Modifiers chapters.

You can choose one of following methods to determine how a formula calculates the price:

- **Dynamic calculation:** The list price resulting from the formula calculation is not calculated or stored anywhere until the sales order is entered with that Price List line item. When the sales order is entered, the pricing engine evaluates the formula and displays the final list price on the order.
- **Static calculation:** If the formula is attached to a price list line for static calculation of the final list price, you can run a concurrent program at any time to calculate the final list price using the formula up front (not wait until order entry time) and also store it in the price list.

Seeded Formulas

Oracle Advanced Pricing provides seeded formulas that you can use when setting up freight charges. For more information, see the *Oracle Advanced Pricing Implementation Manual*.

Creating a Pricing Formula

You can set up and update formulas and formula lines in the Advanced Pricing - Pricing Formulas window. A formula is a valid mathematical expression used to determine the list prices of items and the discounts applied to those items. The formula lines provide details about each part of the formula.

Note: The concurrent program Build Formula Package should be run if a new formula expression is created

A formula can contain any of the following:

- Parentheses: for example, (and)
- Mathematical operators: for example, +, -, /, and *
- Built-in functions: for example, NVL, SQRT, and MOD
- Operands: Operands are step numbers about which you provide more detail. You can use as many step numbers as you need, up to the limit of the field. You can repeat a step number in a formula, for example, 1+2*2.

Note: An operand is not a numeric constant. If you want to use a numeric constant in a formula, you must create a step number in the formula expression and then assign the numeric constant to the step number in a formula line

For example, the valid formula $(1+2*\text{SQRT}(3)) / 4$ contains:

- Operands: 1, 2, 3, and 4
- Mathematical operators: +, *, and /
- Built-in function: SQRT
- Parentheses: to group the operands and operators

For each preceding step number, you need to create four formula lines since the formula has four step numbers.

Oracle Advanced Pricing uses the formula line and evaluates it to obtain the value of the operand and calculates a formula. It does not use the face value of the step number.

You assign one of the following types to each formula line:

- Function: The function GET_CUSTOM_PRICE retrieves a price from an external system and uses it in the formula calculation. You create the program logic to map to the external data source by developing PL/SQL program packages. The function GET_CUSTOM_PRICE returns a numeric value.

Note: Advanced Pricing formulas supports all the functions supported by PL/SQL. For more information on PL/SQL functions, see: *Oracle9i SQL Reference, Release 2 (9.2), Functions*.

- **List price:** The price of the item in a specific price list to which you have attached a formula.
- **Factor List:** A list of factors that you can link to multiple pricing attributes or a range of these attributes. The pricing engine evaluates the formula, then chooses one of these factors depending into which range the actual pricing attribute of the item falls.

For example, a step in the formula may have different factors defined for different ranges of glass thickness: a glass with thickness between 0.1 and 0.3 mm has a factor of 3 and a glass with thickness between 0.4 and 0.8 mm has a factor of 5. The pricing engine determines which factor qualifies when it evaluates an order and applies this factor in the formula calculation.

You can also relate multiple factor conditions. For example, if the base pricing attribute for glass thickness is between 0.1 and 0.3 mm AND the length of the glass is between 0.5 and 2 m, apply the factor of 3 OR if the base pricing attribute for glass thickness is between 0.4 and 0.8 mm AND the length of the glass is between 0.5 and 2 m, apply the factor of 5.

- **Modifier Value:** Uses the value that is entered in the Value field from the Advanced Pricing - Define Modifier window > Discounts/Charges tab.
- **Numeric Constant:** A numeric value.
- **Price List Line:** The price of the item in a specific line of a specific price list.
- **Pricing Attribute:** The absolute value of a pricing attribute (such as thickness or height) of an item.

Pricing attributes are characteristics of products and services that you can specify when the characteristics help to determine the price of a product or service. Distance, age of a related product, customer class, product family group, and level of service are examples of pricing attributes. You can specify one or a combination of pricing attributes and assign them to a product or service. At order entry time, the pricing engine evaluates the attributes you have specified during formula setup to calculate the price.

You can define as many attributes as you need to meet your pricing business needs. For example, you may use the formula $1*2$ to calculate the price of a glass item. Step 1 is a pricing attribute for thickness and step 2 is the list price to calculate the price of a glass item; if 100 is the base price of the glass item and 0.3 is the value of the thickness attribute of the glass then the pricing engine evaluates the formula as $0.3*100$ which is 30.

Null Values in Formulas

During formula calculation, if a step results in a null value, the formula fails. For example, in the formula $1*2$, step 2 is of type Pricing Attribute, pricing attribute context is Physical Attribute, pricing attribute is Volume, and the user should supply the volume at order entry time.

Since the user may not provide a volume use the NVL expression in the formula to point to a step that evaluates to a non-null value. Change the formula to $1* NVL(2,3)$. In the formula line for step number 3, arrange for a non-null value, for example the numeric constant 8. If the user does not provide a value for volume, the pricing engine uses 8 in the formula calculation.

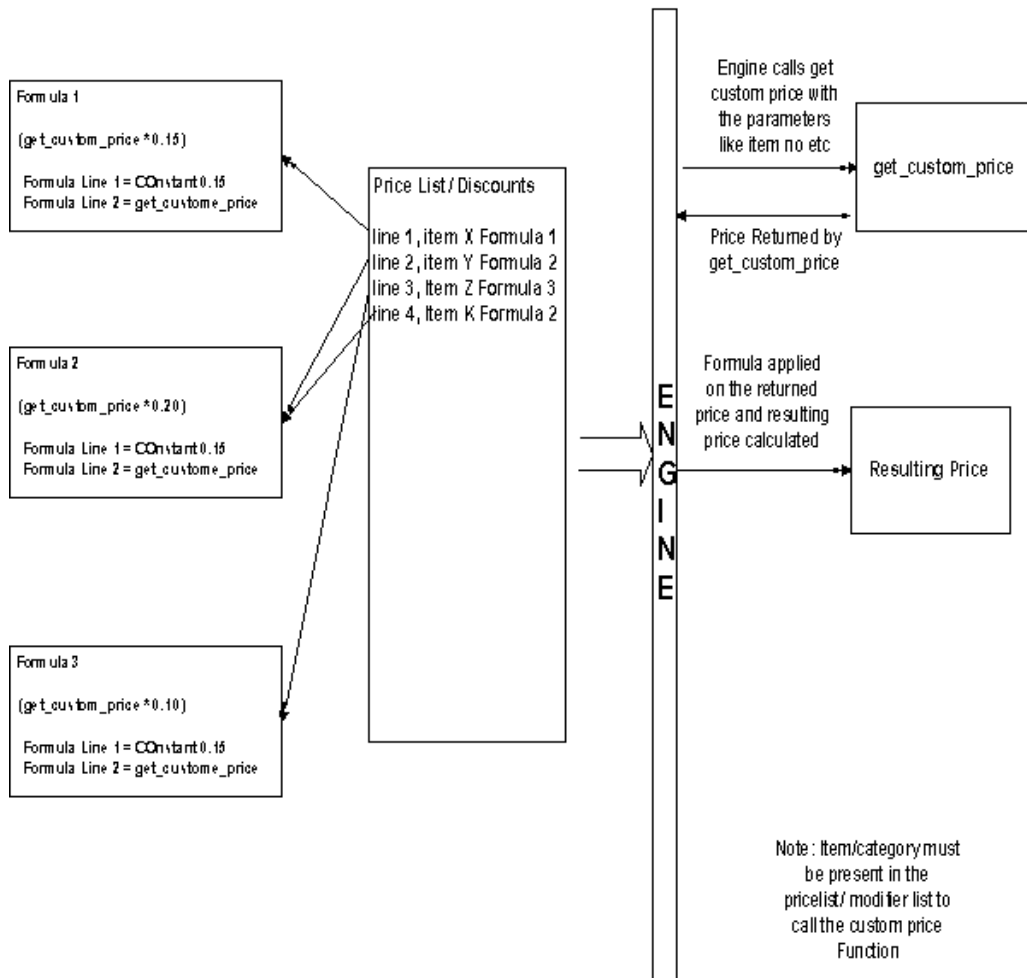
If the expression does not use NVL in the expression, and the step number evaluates to NULL, the entire expression evaluates to NULL, the formula calculation fails, and the calling application processes the failure.

GET_CUSTOM_PRICE

The following diagram illustrates the GET_CUSTOM_PRICE function. It shows several formulas which reference price lists and discounts. When the pricing engine evaluates a formula, it passes the formula, price list, and discount information to GET_CUSTOM_PRICE. GET_CUSTOM_PRICE returns a value, the pricing engine uses that value to calculate the formula and returns the formula value to the calling application.

After the diagram, the text explains the GET_CUSTOM_PRICE function in more detail.

Get Custom Price



To use the Function formula type, modify the function GET_CUSTOM_PRICE. Write custom code in the function body that uses the standard input parameters. You can only write a function body that returns a number.

You can use the GET_CUSTOM_PRICE function in more than one formula. The formula ID is an input parameter which you can use to differentiate code logic among formulas.

To use the return value in a formula, do the following:

- Set up a formula having a formula line of type Function.
- Set the system profile option QP: Get Custom Price Customized to *Yes* at the Site level. If the pricing engine evaluates custom code within the GET_CUSTOM_PRICE function and the profile option is No, the formula calculation fails, and the calling application processes the failure.

GET_CUSTOM_PRICE is in the package QP_CUSTOM and its specification is QPXCUSTS.pls. QP_FORMULA_PRICE_CALC_PVT calls QP_CUSTOM.Get_Custom_Price().

The pricing engine passes the parameters to the function. You may not change the GET_CUSTOM_PRICE parameters which are:

- p_price_formula_id: Primary key of the formula that uses the Get_Custom_Price function.
- p_list_price: List price on the price list line to which the formula using Get_Custom_Price is attached. May be null.
- p_price_effective_date: Pricing Effective Date, the date for which the pricing engine is evaluating the formula.
- p_req_line_attr_tbl: PL/SQL table of records containing context, attribute, and attribute value records for product and pricing attributes and a column indicating the type (Product Attribute or Pricing Attribute). The engine passes only the pricing and product Attributes of the price list line to which the formula is attached.

Note: The step numbers for a formula are available in the GET_CUSTOM_PRICE API.

To create a pricing formula:

1. Navigate to the Advanced Pricing - Pricing Formulas window.

Advanced Pricing - Pricing Formulas window

Name: ☐ Seeded

Description:

Effective Dates: -

Formula: []

Formula Lines

Formula Type	Pricing Attribute Context	Pricing Attribute	Component	Step	Req'd Flag
List Price				1	<input type="checkbox"/>
Numeric Constant			2	2	<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Factors

2. Enter a Name and Description for the formula.
3. Enter the Effective Dates range.
4. Enter a Formula expression. A formula consists of step numbers (such as 1, 2, 3) used in an arithmetic equation such as 1*2.
 A step number such as 1 in the formula expression corresponds to the formula line with the same step number in the Formula Lines region.
 The Seeded box identifies if the selected formula is seeded.
5. Every time a new formula expression is created, the concurrent program Build Formula Package should be run to generate the formula package.
 From the Tools menu, select Build Formula Package to run the program. Alternately, you can also run the Build Formula Package concurrent program. A Dialog box displays a message if the formula package generation was successful.
6. Save your work.
 In the Formula Lines region, you create formula lines and assign a Step number that can be used in the Formula expression. Complete the following steps for each formula line to be created.
7. Select one of the following Formula Types:
 - Function: The Component field displays GET_CUSTOM_PRICE. You must write the function in this PL/SQL package and it must return a number. See *Oracle Advanced Pricing Implementation Manual*, Get Custom Price for an overview of GET_CUSTOM_PRICE.
 - List Price: The price of the item in a specific price list to which you have attached a formula.

- **Factor List:** Select an existing factor list in Component field. Alternately, to create a new factor list, type a new name in the Component field, and press the Enter key. When you complete your entries for the formula line, click Factors to create the factor criteria in the Factors window.
 - **Modifier Value:** A formula which has a Modifier Value as a component cannot be attached to a price list line.
 - **Numeric Constant:** Enter the numeric constant in Component.
 - **Price List Line:** A formula which has List Price as a component and is attached to a price list line gets the list price from the Value entered in a price list line.
 - **Pricing Attribute:** Select the Pricing Attribute Context and Pricing Attribute.
8. Enter the Step number for the formula expression. Step numbers cannot be repeated in the Formula Lines region even though they can be repeated in the Formula expression.

The Seeded box is selected for seeded formula lines.

The Req'd Flag check box is currently not used by the pricing engine except if you are using custom code for tracking formula line information. If you are using custom code for this purpose, then select the Req'd Flag check box.

9. Save your work.

To define factor list details:

1. If the Formula Type is Factor List, click Factors in the Advanced Pricing - Pricing Formulas window to display the Factors window.

Factors window

The screenshot shows the 'Factors' window with two main sections: 'Base Pricing Attributes' and 'Associate Pricing Attributes'.

Base Pricing Attributes: This section contains a table with the following columns: Attribute Context, Base Pricing Attribute, Operator, Value From, Value To, and Adjustment Factor. The first row is populated with 'Item' in the Attribute Context, 'Item Number' in the Base Pricing Attribute, '=' in the Operator, '5609' in the Value From, and '1000' in the Adjustment Factor.

Attribute Context	Base Pricing Attribute	Operator	Value From	Value To	Adjustment Factor
Item	Item Number	=	5609		1000

Associate Pricing Attributes: This section contains a table with the following columns: Associated Pricing Attribute Context, Associated Pricing Attribute, Operator, Value From, and Value To. The first row is empty.

Associated Pricing Attribute Context	Associated Pricing Attribute	Operator	Value From	Value To

At the bottom right of the window are 'OK' and 'Cancel' buttons.

2. In the Base Pricing Attributes region, complete steps 2-9 for each base pricing attribute factor. See: Finding Formula Factor Lines, page 4-9 for information on searching for formula factor lines.
3. Select a value for Base Pricing Attribute Context.
 If you have multiple entries, you must use the same base context in this region (to create an OR condition); the pricing engine chooses one of the entries. Use the Associate Pricing Attributes region to associate additional contexts with the base context (to create an AND condition where both attributes must be present to qualify).
4. Select a value for Base Pricing Attribute.
5. Select a comparison Operator and enter the Value From/To:
 - If you select the operator BETWEEN, you must enter a Value From. If you do not enter a value for Value To, it defaults to unlimited.
 - If you select =, you must enter Value From and you cannot enter Value To.
6. Enter the Adjustment Factor. An adjustment factor enables you to adjust the price based on the options selected. For example, if you are selling cars, you could use adjustment factors to adjust the price based on the car options the customer chooses:
 - If the car options are Standard then the price is multiplied by 1 (factor=1)
 - If the car options are Business then the price is multiplied by 1.5 (factor=1.5)
 - If the car options are Deluxe then the price is multiplied by 2 (factor=2)

If the cars you are selling are second hand, you probably want to adjust the price further based on the age of the car. For example:

 - If the car is between 0.0 and 1.0 years old, the price is multiplied by 1.
 - If the car is between 1.1 and 3.0 years old, the price is multiplied by 0.8.
 - If the car is older than 3.0 years, the price is multiplied by 0.6.
7. Enter Start/End Date range for this attribute in this factor list.

Note: The effectivity of this pricing attribute in this factor list also applies in all other formulas that use this factor list.
8. Complete the following steps for each associated pricing attribute:
 1. In the Associate Pricing Attributes region, select an Associated Pricing Attribute Context and Associated Pricing Attribute to associate with the base pricing attribute context and base pricing attribute values (to create an AND condition).
 2. Select a comparison Operator and enter the Value From/To:
 - If you select the operator Between, you must enter a value for Value From. If you do not enter a value for Value To, it defaults to unlimited.
 - If you select =, you must enter Value From and you cannot enter Value To.
9. Save your work.

Finding Formula Factor Lines

A factor list can consist of hundreds of factor lines and associated base pricing attributes. If your business requirements require you to change the values of certain pricing attributes, it is time consuming to scroll through the entire factor list to find a required record. Instead use the Find Formula Factor Lines window to selectively retrieve the records you want.

You can narrow your search by selecting search criteria that defines the factor line you want to retrieve. You can query by Pricing Context, Pricing Attribute, Query Operator, and Pricing Attribute Value.

The query returns all those factors in the factor list which has either a base or an associated pricing attribute that meets the query criteria. The results are sorted by the Pricing Attribute Value From of the Base Pricing Attribute of the factor lines that are returned by the query.

To find formula factor lines:

1. Navigate to the Find Formula Factor Lines window.

Find Formula Factor Lines window

Find Formula Factor Lines

Factor Pricing Attribute Context:

Factor Pricing Attribute:

Query Operator:

Pricing Attribute Value From Low:

Pricing Attribute Value From High:

Clear New Find

2. Enter the Factor Pricing Attribute Context for the query such as Item.
3. Enter the Factor Pricing Attribute such as or Item Category or Customer Item.
4. Enter the Query Operator such as = or Between. The = operator returns an exact match while the Between operator returns a range of values. If the Pricing Context on the Query Find window is Item and the Pricing Attribute is either Item Number or Item Category, then the Query Operator is restricted to the value =.
5. Enter a Pricing Attribute Value From High/Low to define the range of values you want queried; for example, to restrict a query to a range of item numbers from 23456 to 45674. However, if the = operator is selected you can only enter a value for Pricing Attribute Value From Low.
6. Click Find to return the query results.

7. Alternately, to start a new query, click Clear to clear the current query criteria and enter your query criteria.
8. Click New to create a new Base Pricing Attribute.

Updating Formula Prices

Use this process to use static formulas to set list prices. When you attach a formula to a price list line, you can select from the following calculation methods:

- Dynamic calculation: When you enter an order the pricing engine uses the formula to calculate list price.
- Static calculation: Prior to order entry, you execute a concurrent process which calculates the list price.

To update formula prices for static calculation:

1. Navigate to the Update Formula Prices window.

Update Rule Prices window

2. To calculate formula-based prices:
 - For price list lines whose formulas have been added or changed from when they were last updated by this concurrent program, select New and Modified Lines Only of Price Lists.
 - For all price list lines, clear New and Modified Lines Only of Price Lists.
3. To consider price list lines that have:
 - Any formula, select Update All Pricing Formulas for Price Lists.
 - A certain formula, select Update Individual Pricing Formula for Price Lists, and select the specific Pricing Formula.

The process applies this choice after it selects the price list lines according to the criteria for Step 2.
4. Click Submit to display the Request ID.

Price Lists

This chapter covers the following topics:

- Overview of Price Lists
- Creating a Price List
- Creating Price List Lines
- Defining Price Breaks for a Price List Line
- Defining Price Breaks with Block Pricing (for application method Block Price)
- Finding Price List Lines
- Creating a GSA Price List
- Maintaining Price Lists
- Adding Items to a Price List
- Adjusting Prices for a Price List
- Copying a Price List
- Copying a Price List Line
- Oracle Advanced Pricing Home page (HTML Interface)
- Using Price Lists in the HTML User Interface
- Creating a Price List (HTML Interface)
- Creating Price List Lines (HTML Interface)
- Searching for Price Lists (HTML Interface)
- Searching for Price List Lines (HTML Interface)
- Updating a Price List (HTML Interface)
- Updating Price List Lines (HTML Interface)
- Archiving, Deleting, and Purging Price List Information
- Using the Price List Maintenance feature (HTML Interface)
- Searching for Price Lists and Price List Lines (HTML Interface)
- Making Detail Changes across a Selected Group of Lines
- Making Bulk Changes across a Selected Group of Lines

Overview of Price Lists

Price lists are essential to ordering products because each item entered on an order must have a price. Each price list contains basic list information and one or more pricing lines that define item and/or item category prices. Basic information includes the price list name, effective dates, currency, pricing controls, and shipping defaults such as freight terms and freight carrier. For a price list, you can define price breaks, pricing attributes, qualifiers, and secondary price lists.

- You can only view or update a price list for your pricing transaction entity. The profile QP: Pricing Transaction Entity must match the pricing transaction entity of the price list.
- You can only view or update a price list in your source system. The profile QP: Source System Code must match the source system of the price list. Otherwise, the price list is view-only.
- The profile option QP: Selling Price Rounding Options affects the rounding of adjustments. For more information on this and other profile options, see: *Oracle Advanced Pricing Implementation Manual*, Profile Options.

Using Price Lists in the HTML User Interface

Oracle Advanced Pricing provides an HTML-based user interface (UI) that features guided steps, user-friendly pages, and shortcut links for setting up and maintaining modifiers, price lists, and qualifiers.

You can use this HTML format for many tasks that were previously available only using the Oracle Forms-based interface. Tasks that can be completed in HTML are identified by (HTML Interface) in the task title, for example, Creating a Price List (HTML Interface).

Price List Terms

The following defines common price list terms that you will see when setting up and maintaining price lists:

Effective Dates

Price lists can have starting and ending dates. This enables you to prepare price lists ahead of when they are valid and to ensure they are not used until their start dates.

Inactive Price Lists

You can temporarily or permanently inactivate a price list by clearing the Active box. For Inactive price lists, you can still do the following actions:

- Query the inactive price list: When querying, the Active box is enabled, but the underlying value is null. To retrieve only inactive price lists, clear the Active box; to retrieve only price lists that are active, clear the Active box, then select it.
- Update it
- Base a formula on an inactive price list

Note: The pricing engine does select inactive price lists when doing a pricing request. Other applications can call an inactive price list and use relevant information.

Currency

If you have global customers or do pricing in different currencies, the multi-currency feature enables you to maintain a single price list for multiple currencies. See Overview of Multi-Currency Conversion Lists, page 7-1 for more information on multi-currency price lists.

Round To

The Round To value defines the number of places to the right or left of the decimal point to which the pricing engine rounds prices from price lists and modifiers from modifier lists:

- A positive number such as 2 indicates the number of places to the left of the decimal point. For example, a round to factor of 2 indicates rounding to the nearest hundreds so 107 rounds to 100.
- A negative number such as -3 indicates number of places to the right of the decimal point. For example, a round to factor of -3 indicates rounding to the nearest thousands so 1.1445 rounds to 1.145.

The pricing engine rounds the base price and all discount amounts before using them in calculations.

You can limit the rounding factor value by the number of positions you specify in the extended precision format of the price list's currency. The value returned depends on the value that was set for the profile option QP: Unit Price Precision Type:

- Standard: The rounding factor defaults to the currency's precision value. You can override the rounding factor to any value greater than or equal to the currency's precision value.
- Extended: The rounding factor defaults to the currency's extended precision value. You can override the rounding factor to any value greater than or equal to the currency's extended precision value.

For more information, see the *Oracle Advanced Pricing Implementation Manual*, Profile Options.

Note: If multi-currency is enabled, the Round To field will be disabled and will reflect the Round To value defined for the Multi-Currency Conversion window.

Secondary Price List

The pricing engine uses secondary price lists when it cannot determine the price for an item using the price list assigned to an order. Primary and secondary price lists have the same currency.

Note: You can only add a secondary price list one you enter the currency for the primary price list. This ensures that the secondary price list has the same currency as the primary price list.

If the item you are ordering is not in the primary price list, the pricing engine looks for the price on any attached secondary price list. If the item is found, the pricing engine uses the highest precedence secondary price list (the secondary price list with the lowest value in the precedence field).

If an item appears in both the primary and a secondary price list with the same effective dates, the pricing engine uses the primary price list to price the item. If an item appears on the primary price list but is not active (the effective end date has passed), the pricing engine uses the price on the secondary price list.

Note: The pricing engine does not evaluate qualifiers on secondary price lists; however, some user setups may require them to be evaluated. In these cases, the System Administrator must change the profile QP: Qualify Secondary Price Lists to Yes. See *Oracle Advanced Pricing Implementation Manual*, Profile Options for more information.

Agreement Price List

Oracle Advanced Pricing allows you to establish agreements with your customers that define the prices, payment terms, and freight terms that you negotiate.

There are two methods by which you can manage agreements:

- Standard agreements which use standard price lists (PRL)
- Pricing agreements which use agreement price lists (AGR)

Note: If you are unable to query or update the price list after saving or exiting from the window, consult with your Pricing Administrator for access privileges. Your security access privilege may not allow you to access the price list windows.

Related Topics

Oracle Advanced Pricing Implementation Manual, Pricing Security

Using Oracle Advanced Pricing in the HTML Interface, page 1-4

Using Price Lists in the HTML User Interface, page 5-32

Creating a Price List

Price lists contain item and item category prices. You can define and maintain multiple price lists.

Note: Oracle Advanced Pricing also provides an HTML-based user interface for setting up and maintaining price lists. See *Creating a Price List (HTML Interface)*, page 5-33.

If you are using the multi-currency conversion feature, see: *Overview of Multi-Currency Conversion Lists*, page 7-1.

You can define the following types of prices on price lists:

- Unit price: A fixed price.
- Percent Price: A price which is a percent of the price of another item.
- Formula: Multiple pricing entities and constant values related by arithmetic operators. For example, you define the price of an item to be a percentage price of another price list line.

- **Price Break:** If the price of an item varies with the quantity ordered, you can define bracket pricing or price breaks. The following table displays an example of a price setup:

Example of Price Setup

Price Break	Attribute	Value	Value From	Value To	Unit Price
1	Item Number	A11111	1	11	\$50
2	Item Number	A11111	12	100	\$45

Qualifier Grouping Number Options

You can attach both qualifiers and qualifier groups to a price list. When you attach qualifier groups, all the qualifiers in the qualifier group are attached. You can use qualifier grouping numbers to indicate to the pricing engine how to evaluate the qualifiers. For more information on qualifier groups, see: Using Qualifier Grouping Numbers, page 2-11 and Using Qualifier Grouping Numbers across Qualifier Groups, page 2-13.

To create a price list:

1. Navigate to the Advanced Pricing - Price Lists window.

Advanced Pricing - Price Lists window

The screenshot shows the 'Advanced Pricing - Price Lists' window. The 'Main' tab is selected, displaying the following information:

- Name:** Business World
- Description:** Price List for Business World
- Currency:** USD
- Multi-Currency Conversion:** Generated Currency Co
- Round To:** -2
- Effective Dates:** -
- Payment Terms:** 30 Net
- Freight Terms:** Prepay & Add
- Freight Carriers:**
- Comments:**

Below the 'Main' tab, the 'List Lines' tab is active, showing a table of product lines:

Product Context	Product Attribute	Product Value	Product Description	
Item	Item Number	Vision	Vision	E
Item	Item Number	#80000	Sentinel Multimedia	E
Item	Item Number	#81000	One Year Maintenance - reve	E
Item	Item Number	#82000	Consulting/Training	E
Item	Item Number	CM31556	Monitor - 19" Flat	E

At the bottom of the window, there are buttons for 'Price Breaks' and 'Pricing Attributes'.

2. Enter a Name for the price list.

Note: The price list Name should be unique across PTEs (Pricing Transaction Entities) otherwise an error occurs. For example, if a price list named Corporate is created in the Order Management

PTE, an error message displays if you create a Corporate price list in the Purchasing PTE.

3. Select the Mobile Download box if you are using an Oracle Mobile application and want to download specific price lists onto a mobile device such as a laptop computer. The default value is No.

You can select or clear the Mobile Download box either when creating or updating a price list.

4. To activate the price list, select the Active box.
5. Enter a Description of the price list.
6. Select a price list Currency.
7. Enter a Round To value that is applied to the price list. A positive number indicates the number of places to the left of the decimal point. A negative number indicates number of places to the right of the decimal point. The default is -2. The pricing engine rounds the base price and all discount amounts before using them in calculations.

The value returned depends on the value that was set for the profile option QP: Unit Price Precision Type:

- Standard: The rounding factor defaults to the currency's precision value. You can override the rounding factor to any value greater than or equal to the currency's precision value.
 - Extended: The rounding factor defaults to the currency's extended precision value. You can override the rounding factor to any value greater than or equal to the currency's extended precision value.
8. Enter the starting and ending Effective Dates for the price list.
The Start Date defaults to the current date.
 9. Select the default Payment Terms.
 10. Select the default Freight Terms.

The Global box is selected when the Pricing Security Control profile option is set to ON. This means that the price list can be used by all operating units for pricing transactions. If cleared, the price list's use is restricted to the operating unit of the user creating the price list.

11. Select the default Freight Carrier.
12. Enter any Comments.

In the Other Tab

13. Select the Other tab.

Advanced Pricing - Price Lists window: Other tab

Advanced Pricing - Price Lists

Main Other

List Source Document Number List Source Code

Pricing Transaction Entity System Source Code

Blanket Sales Agreement

Customer Customer Number

☐ Shareable

List Lines Secondary Price List Qualifiers

Product Context	Product Attribute	Product Value	Product Description	
Item	Item Number	Vision	Vision	E
Item	Item Number	80000	Sentinal Multimedia	E
Item	Item Number	81000	One Year Maintenance - reve	E
Item	Item Number	82000	Consulting/Training	E
Item	Item Number	CM31556	Monitor - 19" Flat	E

Price Breaks Pricing Attributes

14. The Other tab displays the following information, and if applicable, details about the related Blanket Sales Agreement:

- List Source Document Number: The Blanket Number of the blanket sales agreement associated with the price list.
- List Source Code: Displays the code for the price list source. For example, BSO indicates Blanket Sales Order.
- Pricing Transaction Entity: Displays the name of the pricing transaction entity creating the price list. This field cannot be updated.
- Source System Code: Displays the code name for the source system creating the price list such as QP for pricing. This field cannot be updated.

Note: The Pricing Transaction Entity and Source System fields display for all price lists regardless of whether there is a related Blanket Sales Agreement.

- Shareable box: Indicates if the modifier is shared or not. If non-shareable (the default), then this modifier is specific to that blanket and cannot be used with other blanket sales agreements.

If shared, the modifier is not exclusive to the blanket sales agreement and can be selected for use with other agreements. Source Document Number: This is the Blanket Number of the blanket sales agreement associated with the price list.

Once you have completed entries in the price list header, you can add price list lines that define the actual items and list prices for the price list.

Related Topics

Creating Price List Lines, page 5-8

Creating Price List Lines

In the List Lines tab of the price list, you can add price list lines to define the actual items on the price list and their list prices.

To create price list lines:

1. Select the List Lines tab in the Advanced Pricing - Price Lists window.

Advanced Pricing - Price Lists window: List Lines tab

Product Context	Product Attribute	Product Value	Product Description	
Item	Item Number	Vision	Vision	E
Item	Item Number	80000	Sentinal Multimedia	E
Item	Item Number	81000	One Year Maintenance - reve	E
Item	Item Number	82000	Consulting/Training	E
Item	Item Number	CM31556	Monitor - 19" Flat	E

2. Select Item from the Product Context field.
3. Select a Product Attribute for the Item such as Item Number, Item Category, or All Items.

Note: Use All Items to apply the same price to all items in your product hierarchy.

4. Enter a Product Value for the selected product attribute.

Note: If the QP: Price Rounding profile option is set to Enforce Currency Precision, and you enter a list price (in Product Value field) greater than the precision amount allows, you will be unable to save the price list. An error message only displays when you try to save the price list, not when you first enter the list price.

5. The UOM (unit of measure) field defaults from the item master of the validation organization. You can change it to any valid unit of measure for that item.
6. Select the Primary UOM box to select the primary pricing unit of measure for the item.

For example, an item (such as item A11111) in a price list may have two price list lines: one with a UOM of Each (EA)--the primary UOM--and the other with a UOM of Boxes. The pricing engine uses the pricing Primary UOM and the Oracle Inventory UOM conversion information to price an order whose unit of measure does not have a price list line. If an order for item A11111 is placed in the unit of measure Case (CS), the pricing engine accesses the unit of measure conversion tables to convert Case to Each (EA).

7. Select one of the following Line Types:
 - Price Header: To set up price breaks for the item.
 - Price List Line: To enter a base list price for the item.
8. If you selected Price Header as the Line Type, select the Price Type:
 - Point: The pricing engine charges each unit of volume at the price of the within which the total falls.
 - Range: The pricing engine charges each unit of volume at the price of the within which it falls.
9. Choose an Application Method:
 - Block Price: This method is enabled only if Price Header is selected as the Line Type. Defines the price for the entire set of a block. See Defining Price , page 5-16 for more information on setting up and using block pricing.
 - Unit Price: Defines the price for inventory items and item categories
10. Enter a Value which is typically the base list price of the item.

If Price Header is selected as the Line Type, you cannot enter the Value (price) at the list line level. Instead, click Price Breaks to enter price ranges.
11. Enter either a Static Formula or Dynamic Formula. If Price Header is selected as the Line Type, you cannot select a formula.
 - For Static Formulas, run the Build Formula Package program to calculate the value. The result of the calculation changes the Value.
 - For Dynamic Formulas, you only need to enter Value if the formula includes list price as one of the formula components. At pricing time, the pricing engine calculates the price of the item using the formula. If the formula does not return a price, the engine uses the value of Price as the price.
12. Enter the Start Date and End Dates for the price list line. The dates should be within the effective start and end dates of the price list.

This Precedence value defaults based on the product attribute selected.

The pricing engine uses precedence values to resolve conflicts if more than one price list line is selected from a price list.
13. Save your work.

To define pricing attributes:

1. Click Pricing Attributes in the List Lines tab to display the Pricing Attributes window.

Pricing Attributes window

The screenshot shows the 'Pricing Attributes' window. It contains a table with the following columns: Product Context, Product Attribute, Product Value, Pricing Context, and Pricing Attribute. The first row is populated with 'Item', 'Item Number', and 'AS54888'. The Pricing Context and Pricing Attribute columns are empty. There are scroll bars on the right and bottom of the table area.

Product Context	Product Attribute	Product Value	Pricing Context	Pricing Attribute
Item	Item Number	AS54888		

2. Select a Pricing Context and Attribute for the selected product.
3. Select an Operator value: =, not=, or BETWEEN.
4. Enter Value From.
5. Enter a value for Value To, if the Operator is BETWEEN.
6. Save your work.

Note: The pricing attributes are joined as AND conditions since they apply to one price list line.

To select a secondary price list:

1. In the Secondary Price List tab, select a Secondary Price List, page 5-3.

Advanced Pricing - Price Lists window

The screenshot shows the 'Advanced Pricing - Price Lists' window. The 'Other' tab is selected, displaying the following fields:

- Name: VL's Corporate Price List
- Description: VL's Corporate Price List
- Currency: USD
- Effective Dates: -
- Freight Terms: Prepay & Add
- Comments: [Empty]
- Mobile Download: ☐
- Active: ☒
- Payment Terms: 30 Net
- Round To: -2
- Freight Carriers: [Empty]

The 'List Lines' tab is also visible, showing a table with the following data:

Secondary Price List	Precedence	Description
VL test Jan20	140	
Business World	140	Price List for Business World

If the item you are ordering is not in the primary price list, the pricing engine looks for the price on any attached secondary price list. If the item is found, the pricing engine uses the highest precedence secondary price list (the secondary price list with the lowest value in the Precedence field).

2. Save your work.

Note: The pricing engine does not evaluate qualifiers on secondary price lists; however, some user setups may require them to be evaluated. In these cases, the System Administrator must change the profile QP: Qualify Secondary Price Lists to Yes. See *Oracle Advanced Pricing Implementation Manual*, Profile Options for more information.

To create qualifiers:

1. Select the Qualifiers tab.

Advanced Pricing - Price Lists window: Qualifiers tab

Advanced Pricing - Price Lists

Main Other

Name **VL's Corporate Price List** ☐ Mobile Download ☒ Active

Description **VL's Corporate Price List**

Currency **USD** Round To **-2**

Effective Dates - Payment Terms **30 Net**

Freight Terms **Prepay & Add** Freight Carriers

Comments

List Lines Secondary Price List **Qualifiers**

Group	Grouping Number	Qualifier Context	Qualifier Attribute	Precedence
	-1	Customer	Customer Class	310

Copy Group

- Enter a qualifier Grouping Number. Qualifier lines with the same grouping number generate an AND condition and qualifiers with different grouping numbers generate an OR condition.

For more information on qualifier grouping numbers, see: Using Qualifier Grouping Numbers, page 2-11.

- Select the Qualifier Context.
- Select the Qualifier Attribute. For example, if you selected Qualifier Context = Volume, then all the qualifier attributes for volume are listed (except Order Amount which cannot be used).
- Enter an Operator and Value From/To.

Note: Some list of values for qualifiers (such as Customer) may have large value sets that may prolong your query. To reduce the number of items that display in the list of values, enter additional search criteria in the field.

If you do not enter search criteria and click a list of values, a Decision window advises that you have not entered search criteria and that the search may take a long time:

- To display a reduced list of values, click No, enter search criteria, and click the list of values.
- To display the entire list of values, click Yes.
- If you do not want to see the list of values, click Cancel.

Set the profile option QP: Valueset Lookup Filter to avoid this message.

The Value From Meaning field displays additional details of the qualifier when you query a qualifier after saving it. For example, if the context is CUSTOMER and the attribute is Ship To, the Value From field displays the customer name and Value From Meaning field displays the site use location for the customer. If the context/attribute combination has no additional details, Value From and Value From Meaning are identical.

6. Enter a range for the Start/End Dates.

To copy qualifier groups (to the price list):

1. In the Qualifiers tab (Price Lists window), click Copy Group to display the Qualifier Groups window:

Qualifier Groups window

Name	Description
<input type="checkbox"/> QP QA BASE GROUP	BASE AND 4 OR CONDITIONS. THIS WILL BE
<input type="checkbox"/> QUAL1317828	Qualifier Group for PKM Deliverables
<input type="checkbox"/> QUAL2	Qualifier Group for PKM Deliverables
<input type="checkbox"/> QUAL732417	Qualifier Group for PKM Deliverables
<input type="checkbox"/> QUAL732418	Qualifier Group for PKM Deliverables

☒ Retain Grouping Numbers Across Qualifier Groups
☐ Generate Unique Grouping Numbers Across Qualifier Groups

OK Cancel

2. Select the qualifier group(s) whose qualifiers you want for the price list.

Warning: When a qualifier group for a price list is copied, any qualifier lines within that group that have Order Amount or Price List defined as attributes are not copied over.

3. Select one of the grouping options: Retain Grouping Numbers Across Qualifier Groups or Generate Unique Grouping Numbers Across Qualifier Groups. For more information, see: Using Qualifier Grouping Numbers across Qualifier Groups, page 2-13.
4. Click OK to copy the qualifiers from the selected group(s) to the price list. The qualifiers display in the Qualifiers tab. The name of the originating Group associated with the qualifier displays in the Group field.

Note: After selecting the qualifier groups, confirm that the grouping numbers display the correct combination of AND and OR conditions

5. Save your work.

Defining Price Breaks for a Price List Line

You can use price breaks (bracket pricing) to define prices that vary with the quantity ordered. For example, if you buy up to 10 items the price is \$20 per item, but if you buy more than 10 items, you get a lower price per unit.

Note: If you define a price for an Item Category, then all items within the category are eligible for the price break.

The following table displays an example of a price break setup:

Price Break	Pricing Context	Pricing Attribute	Value From-To	Price	Application Method	Recurring Value
1	Volume	Item Quantity	1-11	\$50	Unit Price	-
2	Volume	Item Quantity	12-99999	\$45	Unit Price	-

When setting up price breaks, you can define price breaks as either Point or Range breaks:

Point break

Defines prices based on the price bracket in which the *total* quantity falls.

For example, if you ordered 16 units of Item A11111, the total quantity falls into the Price 2 bracket where the unit price is \$45. So the total price is calculated as follows:

Total price = 16 * \$45 each = \$720

Range break

Defines prices based on the *ranges* of the defined price breaks. For each range, the engine calculates a price and sums across all ranges to obtain the list price.

For example, if you ordered 16 units of Item A11111, the unit price from each price (Price Breaks 1 and 2) is applied as follows:

- Price 1: For the first 11 units * \$50 each (unit price from Price 1) = \$550
- Price 2: The remaining 5 units * \$45 each (unit price from Price 2) = \$225

Total price = \$550 + \$225 = \$775

Note: Before setting up price breaks, the following must be selected in the Price Lists window:

- Line Type: Price Header
- Application Method: Unit Price or Block Price

To define price breaks:

1. Click Price Breaks in the List Lines tab of the Price Lists window to display the Price Breaks window.

Price Breaks window

Pricing Context	Pricing Attribute	Value From	Value To	Price	Application Method	Recurring Value	[]
Volume	Item Quantity	1	1200	30	Unit Price		
Volume	Item Quantity	1201	999999	25	Unit Price		

The Pricing Context is Volume (default), and the Pricing Attribute is Item Quantity. Optionally, select a different Pricing Attribute.

Complete the following steps for each price break to be defined:

2. Enter a Value From/To. To create no upper limit, enter all 9's in Value To.
 - You cannot create overlapping price ranges in the Value From/To fields; for example, if one range is 1 to 11, you cannot have another range that is 5 to 20.
 - If the ordered quantity does not fall in the price range of the price list, the price is still calculated and defaulted in the sales order line. Ensure that the price ranges are set up correctly to get the pricing results you desire:
 - For example, suppose you create the following range price breaks for price list Item AS54888 with the Application Method of Unit Price:
 - Value From/To: 1 to 5 Price: 1.00 each
 - Value From/To: 6 to 7 Price: .75 each

Warning: If the Price Type is Point: The price is not returned if the ordered quantity does not fall in the price range of the price list.

If the Price Type is Range: A price of 0 is retrieved for the ordered quantity that does not fall in the price range.

If a Sales Order for 10 items of AS54888 were placed, the price would be calculated as follows (Price Type is Range):

$$(5*1) + (2*0.75) + (3*0)/10 = 0.65 \text{ Unit Price}$$

Notice that the last 3 items fall out of the price range and therefore a unit price of 0 is returned. Therefore it is important that the price breaks are set up correctly to get the desired price results.

3. Enter a Price:
 - For inventory items and item categories, enter the base list price of the item.
 - For service items: If the Application Method is Unit Price, enter the base list price of the item. If Application Method is Percent Price, enter a percent of another item's price.
4. Select an Application Method:
 - Unit Price: For inventory items and item categories.
 - Percent Price: For service items. You will only see Percent Price as an Application Method if the price list line is a service item.
 - Block Price: See: Defining Price Breaks with Block Pricing (for application , page 5-16method Block Price) for information on setting up price breaks with Block Price.
5. Save your work.

Related Topics

Defining Price Breaks with Block Pricing (for application method Block Price), page 5-16

Defining Price Breaks with Block Pricing (for application method Block Price)

Block pricing enables you to apply a lumpsum price rather than a per unit price to a pricing line. Block pricing also provides setup flexibility where the unit of measure (UOM) of the header is different from the pricing attributes of each child line. In non-block pricing price breaks, the UOM of the child lines is the same as that of the header. In block pricing, child lines have different units of measure than the header. Lastly, block pricing also allows pricing setups that price by recurring values within blocks.

In regular breaks, lines have application method of Unit Price (for inventory items) and Percent Price (for service items only). For block pricing breaks, Unit Price is replaced by Unit Price to differentiate between the line UOM and the header UOM. Percent Price remains the same.

Like regular breaks, block pricing can be defined for either Point or Range price types. However, for Point price breaks, you can only select the Application Method = Block Price.

For Range lines where the Application Method is Price, you can define a recurring value for that block. For example, if the Recurring Value is 100, then the range is priced for every 100 items within the block.

Note: If the recurring value does not divide evenly into the block, the resulting price is a prorated amount, not a flat rate, of the block price.

The following examples show how price breaks with block pricing could be used:

- Shipments between 100 and 200 lbs cost a flat rate of \$50, regardless of the UOM. Without block pricing, the rate would be calculated by multiplying \$50 against the unit quantity. So a 100 lb shipment would be calculated at \$5000.00 (100 lbs X \$50) instead of \$50.00.
- For the first 1 to 100 the price is always fixed at a total amount or lump sum. After that, charge is by the unit: for example, each hour based on a price break.
- \$10 for every hundred items until 1200. After that, \$5 for every 50 items until 2000. After that, \$0.30 per unit.
- \$10 for every hundred until 1200 items. After that, \$30 for every hundred in addition to the cost of the first 1200. For example, with block pricing you would be able to create a price list and price setup, where the total cost for 1300 units will be \$150 (\$120 for the first 1200, \$30 for every additional 100 units).

Note: The Block application method can only be selected if the price list line type is Price Header (PBH).

Example 1: Example of a Block price setup using a Recurring Value

You can apply a block price and have the price repeat for defined intervals (the recurring value); for example, to charge \$10 per 100 items up to 1000 items. In this example, the recurring value is 100.

Note: You cannot use Recurring Value if the Price Type is Point.

When a recurring value is used with price breaks, the Block price repeats for every interval defined by the Recurring Value column. In this example, for the first 1200 units, the price is \$10 for each 100 units up to 1200 units.

For 1201 units and more, you could create a second price to define a price of \$30 for each 100 units.

So if 1300 units were purchased, the total cost would be \$150 which is calculated as follows:

- Block price 1: Price for first 1200 (1200/100= 12 X \$10): \$120 (first price break)
- Block price 2: Price for each additional block of 100 units beginning with 1201 units: \$30 (second price break)

This example could be set up as follows:

1. Navigate to the Advanced Pricing - Price Lists window.
2. Complete the fields in the Price Lists region.
3. In the List Lines tab, enter values for the selected Product Context (Item):
 - Product Attribute
 - Product Value
 - Product Description
 - UOM (unit of measure)
4. Select Price Header as the Line Type.

5. Select Range as the Price Type. When selected, the Recurring Value column in the Price Breaks window is enabled in the Price Breaks window. You cannot use recurring value for point price break.
6. Select Block Price as the Application Method.
7. Click Price Breaks to display the Price Breaks window.

Example 2: Using Block price and Unit price with Price Breaks

For additional pricing flexibility, a Block Price and Unit Price can be applied in a price break. This is commonly found in minimum price scenarios.

Example 2a)

A \$100 flat price is charged for 1 to 100 minutes of cellular phone usage, after which the customer is billed a Unit Price of \$1.00 per minute. This can be done by setting up a Block Price with a recurring value: for example, \$10 per 100 minutes, and then applying a Unit Price of \$1.00 for each minute over 100 minutes.

Example 2b)

- Block Price: \$10 for every 100 units (the recurring value) up to 1200 units (first price break)
- Block Price: \$5 for every 50 units (the recurring value) from 1201 to 2000 units (second price break)
- Unit Price: \$0.30 per unit above 2000 units (third price break)

The following tables display the Block Price and Per Unit price setup in the Price Lists window.

This table displays the Block Price setup:

Item	UOM	Line Type	Price Type	Application Method
ALL	Each (EA)	Price Header	Range	Block Price

This table displays the Per Unit pricing setup:

Pricing Context	Pricing Attribute	Value From-To	Price	Application Method	Recurring Value
Volume	Item Quantity	1-1200	\$10	Block Price	100
Volume	Item Quantity	1201-2000	\$5	Block Price	50
Volume	Item Quantity	2001-999999	\$0.30	Unit Price	Null

Block Price with Application Method of BLOCK PRICE and UNIT PRICE

If BLOCK PRICE is selected as the application method in the Price header for a price list (this is possible only with Range breaks), you can select the following application methods for the price lines:

- BLOCK PRICE
- UNIT PRICE.

When the UNIT PRICE application method is used in the line, the price specified is the unit price per attribute. For example: if the price is based on the price attribute Item Weight, the price to be specified is price per unit weight.

When setting up the price break, the price provided should be the unit attribute price. The Unit price for the ordered item is calculated by multiplying the UNIT PRICE with the sourced Volume Attribute value divided by the ordered quantity.

For example: if the Item Weight in lbs is used as the Volume Attribute in the Price breaks and the price breaks are as follows (Price \$ 10 is the price per lb.):

Pricing Attribute	Value from	Value to	Price	Application method
Item Weight	1	50	10	Unit price
Item Weight	51	100	8	Unit price

The Item Weight is sourced from the total line weight of a sales order line. For example, if a sales order is entered for three items each weighing 2 lbs, then the unit list price returned from the preceding price would be: $[10 \times 6]/3 = \$20$. Six is the total line weight (2 x 3) lbs.

In the preceding context, the pricing attribute and its sourcing are important factors; therefore, it is important to ensure that the appropriate pricing attribute is used when setting up Unit Price lines to get the correct results.

If any Volume attribute that sources a constant value is used, it impacts pricing in the Sales order and causes the list price to vary with the ordered quantity even though the ordered quantity falls in the same break. It is recommended to use sourced volume attributes whose value changes with the ordered quantity such as Item Weight, Item Volume, and Item Quantity.

These considerations apply when using cross order volume attributes too. For example, if the cross-order volume pricing attribute *Period 1 Item Amount* is used in the line, the unit price will be the price per unit period 1 amount.

Unless there is specific business requirement, it is not recommended to use Cross Order Volume attributes with BLOCK PRICE at the Header level and UNIT PRICE for the line. Instead, consider using UNIT PRICE at the Header level for such scenarios.

Related Topics

Defining Price Breaks for a Price List Line, page 5-14

Finding Price List Lines

When querying price list lines, use the Find Price List Lines query window (from the toolbar Find icon) to find specific price list lines. You provide the product attribute context (for example, Item), product attribute (for example, Item Number), and product attribute value (for example, Product A).

In the Price List Lines search window, you can search using the following combinations:

- Item
- Item and UOM

- Category
- Item or Category
- (Item and UOM) or Category

A search can be conducted on the UOM only in combination with Item (Item is mandatory if you want to search on the UOM).

Note: If you search using the Find Price List Lines window instead of using a query-by-example on the Advanced Pricing - Price Lists window, you may reduce the time that you need to wait for the search results.

Creating a GSA Price List

A General Services Administration (GSA) designation identifies a price list belonging to a United States government customer. For products on the GSA price list, a fixed price must be used and defined on the GSA contract.

You can create a GSA price list for your GSA customers. The items on the GSA price list cannot be sold to commercial customers for a price equal to or less than the government price. Therefore, the price offered to the government must be the minimum in the market. A GSA violation occurs when a non-United States government customer is offered a price equal to or less than the GSA Price. You can set up multiple GSA price lists that are effective during the same time period.

To create a GSA price list:

1. Navigate to the Define Modifier - Define GSA Price window. In this window, you can set up a GSA price list and GSA prices.

Define Modifier - Define GSA Price window

Define Modifier - Define GSA price

Main Other

Type **Discount List** Number **GSA Discount 100** ☐ Active
 Name **GSA Discount** Version **1** ☒ Automatic
 Currency **USD** Start Date -
 Description **General Services Administration -- fixed price discount** []]

List Qualifiers

Modifiers Summary Discounts/Charges

Modifier No	Level	Modifier Type	Start Date	End Date	Automatic	Override
7812	Line	Discount			<input checked="" type="checkbox"/>	<input type="checkbox"/>
7813	Line	Discount			<input checked="" type="checkbox"/>	<input type="checkbox"/>
7814	Line	Discount			<input checked="" type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>

2. In the Main tab, select Discount List as the Type.
3. Enter a Number.
4. Select or clear Active.

The Global box is selected when the Pricing Security Control Profile is set to ON. This means that the price list can be used by all operating units for pricing transactions. If cleared, the price list's use is restricted to the operating unit of the user creating the price list.
5. Enter a Name and Version for the GSA price list.

The Currency value defaults.
6. Select or clear the Automatic box:
 - If selected, the Automatic box is also selected at the line level.
 - If cleared, then the modifier must be manually applied.
7. Enter the effective Start/End Date range.
8. Enter a Description for the GSA price list.
9. In the Modifiers Summary tab, enter a modifier number as an identifier for the GSA price list.

The Level defaults to Line, and the Modifier Type defaults to Discount.
10. Enter the Start/End Dates of this GSA price list line.

Note: The Start and End Dates for the discount line must be between the Start Date and End Date of the GSA price list. The pricing engine uses the discount line dates to confirm that the dates are in effect for each line.
11. Select Override to enable a user to override the GSA price for the selected price list line. Clear the Override box to prevent a user from overriding the GSA price for the selected price list line.

The Pricing Phase defaults to List Line Adjustment and the Incompatibility Group defaults to Level 1 Incompatibility.
12. The Bucket defaults to 1.
13. Enter Item Number in Product Attribute.
14. Select the item in Product Attribute Value.
15. Enter the Precedence value.
16. Select the corresponding Unit of Measure for the item such as Each or Carton.
17. When you have completed your entries in the Modifiers Summary tab, choose the Discounts/Charges tab.

The Application Method in the Discounts/Charges tab defaults to Newprice.
18. Enter the Value for the item. The value is related to the selected Application Method. For example, if the Application Method is New Price then the Value is expressed in currency units.

In the Other tab, you can view the following including details about any related Blanket Sales Agreement:

- List Source Document Number: This is the Blanket Number of the blanket sales agreement.
- List Source Code: Displays the code associated with the GSA price list. For example, BSO indicates Blanket Sales Order.
- Pricing Transaction Entity (PTE): Displays the pricing transaction entity associated with the GSA price list. The Pricing Transaction Entity value defaults from the PTE that created the GSA price list. This field cannot be updated.
- Source System Code: Displays the source system code such as QP for pricing.

Note: The Pricing Transaction Entity and Source System fields display if there is no related Blanket Sales Agreement.

- Shareable box: Indicates if the GSA price list is shared or not. If non-shareable (the default), then this GSA price list is specific to that blanket and cannot be used with other blanket sales agreements.

If shared, the GSA price list is not exclusive to the blanket sales agreement and can be selected for use with other agreements.

19. Save your work.

To create GSA list qualifiers:

To create qualifiers for a GSA price list, you can select a qualifier context such as customer and then a qualifier attribute that defines the context further such as customer name.

Note: You may be unable to select existing groups from the Qualifiers tab because GSA price lists restrict the type of qualifiers that can be attached.

You can select one of the following Qualifier Contexts:

- Customer: For this qualifier context, you can select either Customer name (GSA customers only) or site as a Qualifier Attribute.
- Modifier List: For this qualifier context, you can select Price List as the Qualifier Attribute.

Note: You can only attach customers only at the list (header) level. You cannot assign line level qualifiers.

Do not change the qualifier flexfield sequence for the GSA qualifier in the flexfield setup.

1. Click List Qualifiers.

Note: Do steps 2-10 for each customer that is eligible for the GSA price.

2. Enter the Grouping Number.

Note: Since Qualifier Context is Customer, make OR conditions by creating each qualifier with a different grouping number.

3. Select either Customer or Modifier List for Qualifier Context.
4. Enter the Qualifier Attribute.
 - If you selected Customer for the Qualifier Context, select either Customer name (GSA customers only) or site.
 - If you selected Modifier List for the Qualifier Context, select Price List as the Qualifier Attribute.
5. Enter Operator value and the Value From/To.
6. Enter the Start/End Date.
7. The Precedence defaults from the item segment of the descriptive flexfield.
8. Enter the customer name in Value From.
9. Enter start date and end date for the customer.
10. Save your work.

Note: The start and end dates of the list qualifiers must be within the start and end date of the modifier list.

Maintaining Price Lists

You can maintain your existing price lists by adding more inventory items, adjusting prices within a single price list, or copying an existing price list to another price list.

For more complex tasks, such as searching across multiple price lists or adjusting prices for the same item across many price lists, Oracle Advanced Pricing provides a Price List Maintenance feature which enables you to:

- Search for price list and line information across many price lists.
- Do mass updates to price lists and price list lines.

Note: You need View Only privileges to view price list and related windows. However, you must have Maintain privileges to make any updates. If you are unable to access or update this window, you may not have the appropriate access privileges. Consult your Pricing Administrator.

The following provides an overview of the common tasks you can do to maintain price lists and price list lines:

Adding Inventory Items to a Price List

When you add inventory items to a price list, you can specify an item status, such as active or planned; an item category, such as hardware or software; or a range of items. You can request the price to be either zero or the items' costs in a specific inventory organization. Later, you can adjust the prices to your selling price.

The process only adds items that exist in the item validation inventory organization and that are not on the price list, even if they are inactive on the price list.

To add items from an item category, you must first define the default inventory category set for Order Management. When you add items from an item category, the process adds all items of the item category to the price list; it does not add the item category.

Adjusting Price Lists

You can increase or decrease the list price of price list lines by an amount or percentage within a price list. You can adjust prices for all lines on the price list, lines that belong to an item category, lines with items of a certain status, lines created on a specified date, or lines having a range of items.

- For information on making simple adjustments to a single price list, see: *Adjusting Prices for a Price List*, page 5-26.
- For information on making mass changes to a single price list or across price lists using the Price List Maintenance feature, see: *Making Bulk Changes across , page 5-57a Selected Group of Lines*.

Updating Prices (manually) for Price List Lines

You can always manually change the price on an existing price list line. If you type over the existing price, the new price is effective for new orders as soon as you save your changes.

If you use price list line effectivity dates, you can maintain a historical record of your prices.

Copying Price Lists

You can quickly create a new price list by copying an existing price list. Only active price list lines (those with an effective end date later than the current date) can be copied. You can also copy active discounts and effective dates from the original price list.

Price List Maintenance feature

The Price List Maintenance feature enables you to search across a single or multiple price lists, select related entities such as specific price list items, and make updates to price list or price list lines across a single price list or multiple price lists.

Related Topics

Using the Price List Maintenance feature (HTML Interface), page 5-50

Making Detail or Bulk Changes to Price Lists (HTML Interface), page 5-50

Searching for Price Lists (HTML Interface), page 5-44

Archiving, Deleting, and Purging Price List Information, page 5-49

Adding Items to a Price List

Use this process to add items from the item master file to price lists. You must define the price list header information before you can add items.

You can add inventory items to a price list by selecting:

- A range of Items
- Item Category Set such as Inventory Items or Purchasing
- Item Category such as Hardware or Software

- Item Status such as Active or Planned

You can set the price to be either zero or equal to the items' costs from a specific inventory organization. Later, you can adjust the prices to your selling price.

The process only adds existing items from the item validation inventory organization and that are not on the price list, even if they are inactive on the price list.

To add items from an item category, you must first define the default inventory category set for Order Management. When you add items from an item category, the process adds all items of the item category to the price list; it does not add the item category.

1. Pricing submits a concurrent process when you add inventory items. The concurrent process only adds new items to a price list; it does not replace existing items, even if the existing items are ineffective.
2. The add items submit request system processes but does not validate input information. So, for example, if you enter Items from 1 to 100, the system does not validate whether Items 1 or 100 exist in the organization.

To add items to a price list:

1. Navigate to the Add Items to Price List window.

Add Items to Price List window

The screenshot shows the 'Add Items to Price List' window. The title bar is 'Add Items to Price List'. The window contains the following fields and controls:

- Price List:** A text field containing 'CORPORATE'.
- Items:** A range input field showing a hyphen between two empty boxes, followed by a dropdown arrow.
- Item Category Set:** A text field containing 'Inv.Items'.
- Item Category:** An empty text field.
- Item Status:** An empty text field.
- Set List Price Equal to Cost From:** An unchecked checkbox.
- Inventory Organization:** An empty text field.
- Request ID:** An empty text field.
- Submit:** A button located at the bottom right.

2. Select the Price List to which you want to add items.

Do one or more of the following steps to select criteria of the items to be added to your price list:

3. Enter an item or range of Items to be added to the price list. You cannot use wild cards such as % when you specify the beginning and ending item numbers.

When you enter an Item(s), the System Items window displays. It features Low/High fields that enable you to define a range of items.

If you enter a Low value for an item such as PS-2 and click Tab, the same value automatically defaults to the High field. However, if you then change the Low value, and click Tab, the High field does not reflect the changed value. You must manually change the High field to the desired value.

4. Select an Item Category Set.

If you specify an Item Category Set only, then all the items which belong to specified Item Category Set will be added to the specified price list

5. To define selected items within an Item Category Set, select an Item Category.
6. Enter an Item Status to select items by their status.
7. Select the Set List Price Equal to Cost From check box if you have Oracle Inventory installed and to set the list price of the inventory item equal to its cost.

Note: The list price becomes zero if:

- You clear the Set List Price Equal to Cost From check box.
- The Inventory Organization does not use the standard costing method.

8. Enter an Inventory Organization to limit the source of the items to add to those in the organization. If you do not enter an organization, the process uses the organization specified in the profile option QP_ORGANIZATION_ID.
9. Click Submit. The Request ID can be used to track your request status.

Adjusting Prices for a Price List

Use this process to adjust the prices for a price list. You can adjust prices for the entire price list or selected items, item category sets, and item categories. You can define your criteria further by selecting the item status or creation date of the items to adjust.

Note: Oracle Advanced Pricing also provides an HTML-based user interface for adjusting prices on price lists. See Using the Price , page 5-50.

For example, you can specify a category so that only the price list lines for the selected category are adjusted. If you leave any of the fields blank, pricing adjusts the price list regardless of that field.

You can adjust the price by either an amount or percent:

- Percent: Enter a value to adjust list prices by a certain percentage. For example, when adjusting by a percentage, entering 10 raises list prices by 10 percent while -10 lowers list prices by 10 percent.

- Amount: Enter a value to adjust list prices by a fixed amount. For example, when adjusting by an amount, entering 5 increases list prices by five whole units of currency. Entering -5 decreases list prices by five whole units of currency.

While adjusting prices:

- If the Item Category Set is specified only, then all the items which belong to the specified Item Category Set and are present in the specified price list will get adjusted.
- If both the Item Category Set and Item Category are specified, then all the items which belong to the specified Item Category Set and Item Category and are present in the specified price list will get adjusted.

To adjust a price list:

1. Navigate to the Adjust Price List window.

Adjust Price List window

The screenshot shows the 'Adjust Price List' window. It contains the following fields and controls:

- Price List:** A text field containing 'CORPORATE'.
- Currency:** A dropdown menu showing 'USD'.
- Description:** A text field containing 'Corporate Price List'.
- Item Prices to Adjust:** A section with several input fields:
 - Items:** A text field with a range indicator (e.g., 1-100).
 - Item Category Set:** A text field.
 - Item Category:** A text field.
 - Item Status:** A text field.
 - Creation Date:** A text field.
- Adjust By:** A dropdown menu set to 'Amount'.
- Value:** A text field next to the dropdown containing '2.00'.
- Request ID:** A text field.
- Submit:** A button at the bottom right.

2. Select the name of the Price List to adjust.

The default Currency and Description of the price list displays.

- To adjust prices for the complete price list only, go to step 8.
 - To adjust the prices of specified items, item category sets, or item categories in a price list, complete the following steps in the Item Prices to Adjust section. Select only the criteria to adjust:
3. Enter an Item or range of Items whose prices you want to adjust. You cannot use wild cards when you specify the beginning and ending item numbers.

Note: For System Items, the list of values (LOV) is not available. For these items, you may need to use an API.

4. Select an Item Category Set.
When you select an Item Category Set only, all item prices in that category set are adjusted.
5. To restrict items within a selected Item Category Set, select additional criteria in the Item Category field.
6. Select the Item Status to include items of a specific status.
7. Enter a Creation Date to adjust the prices of items added to the price list on that date.
8. In the Adjust By field, select Percent or Amount:
 - Percent: Enter a value to adjust list prices by a certain percentage. For example, when adjusting by a percentage, entering 10 raises list prices by 10 percent while -10 lowers list prices by 10 percent.
 - Amount: Enter a value to adjust list prices by a fixed amount. For example, when adjusting by an amount, entering 5 increases list prices by five whole units of currency. Entering -5 decreases list prices by five whole units of currency.
9. Enter a Value which corresponds to the percent or amount to be adjusted.
10. Choose Submit. The request ID is displayed in the Request ID field.

Copying a Price List

You can quickly create a new price list by copying an existing price list. Only active price list lines (those with an effective end date later than the current date) can be copied.

You can also copy:

- active discounts from the original price list.
- the effective dates from the original price list lines.

You can copy an existing Standard price list type to a new Standard price list, or an existing Agreement price list to a new Agreement price list. After the price list is copied, you can create a new agreement and attach the new price list to the agreement. Since price list names cannot be duplicated, each price list name must be unique.

Note: When you copy a price list, the new price list has the same currency as the original price list. If you are using multi-currency enabled price lists, the multi-currency conversion attached to the original will be attached to the new price list.

To copy a price list:

1. Navigate to the Copy Price List window.

Copy Price List window

Copy From

Price List: CORPORATE

Currency: USD

Description: Corporate Price List

Items: [] - []

Item Category Set: []

Item Category: []

☐ Include Discounts

☐ Retain Effective Dates

Copy To

Price List: Corporate 2

Description: Backup

Effective Dates: [] - []

Request ID: []

Submit

2. In the Copy From region, select the name of the Price List to copy. The price list can be either a Standard (PRL) or Agreement (AGR) price list.

The default Currency and Description display for the selected price list.

3. Select one of the following options:

- To copy the entire price list, go to step 7.
- To copy only certain items to a new price list, you can select the item or item range to copy. Enter an Item or range of Items to copy.

Note: You cannot use wild cards when you specify the beginning and ending item numbers.

For System Items, the list of values (LOV) is not available. For these items, you may need to use an API.

4. Select an Item Category and Item Category Set of the items to add. When you add items from an Item Category, the process adds all items of the item category to the price list; it does not add the item category.

Note: You must enter both Item Category Set and Item Category for this criteria to be effective.

5. Select Include Discounts to copy modifiers of type Discount List (DLT).

This is provided for backward compatibility to enable users of Release 11 to copy the modifier type of DLT (Discount List) to the new price list. When selected, only the modifier type of Discount List is copied but not any 11i modifiers.

If you are not copying modifiers from version 11, you do not need to select Include Discounts.

6. Select Retain Effective Dates so that the effective dates for the existing price list lines are copied to the new price list lines.

Even if Select Retain Effective Dates is selected, only the most current price list lines (current as defined by their effective dates) will be copied. Duplicate lines that have expired will not be copied.

Note: The process does not copy the effective dates of the price list, only the price list lines. You must enter effective dates for the new price list.

7. In the Copy to region, enter a name for the new price list. It can be either a Standard (PRL) or Agreement (AGR) price list.
8. Enter a Description for the new price list.
9. Enter Effective Dates for the new price list.
10. Click Submit to copy the price list or selected lines. The request ID is displayed in the Request ID field.

Copying a Price List Line

You can duplicate an existing price list line for a price list. This saves you time from manually re-entering a new pricing line. Although the price list information and pricing attributes are duplicated, price details from the source line are not copied.

Price list lines will be considered duplicate unless the:

- Product value is different.
- Effective dates are different.
- Product attributes are different.
- Comparison Operator Code is different.

To copy a price list line:

1. Enter a new price list or query an existing price list.
2. Navigate to the line below the price list line to be copied.
3. Select one of the following to duplicate the line:
 - Select the Shift+F6 keys.
 - From the Edit menu, select Duplicate > Record Above to duplicate the price list line.
4. You can change Product Value or Effective Dates to avoid a duplicate list line error from occurring in the same price list.
5. Save your work.

Oracle Advanced Pricing Home page (HTML Interface)

The **Oracle Advanced Pricing Home** page provides centralized access to your main pricing tasks. From this page, you can:

- Search for price lists and modifier lists.
- Use the Shortcuts links to quickly navigate to the pages that enable you to create and manage price lists and modifiers.
- Use the Work Queue to view recently-created price lists and modifiers.

The following graphic shows the **Oracle Advanced Pricing Home** page featuring the Search, Shortcuts, and Work Queue regions:

Oracle Advanced Pricing Home page

ORACLE[®] Advanced Pricing [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

Home **Lists**

Search Price List Name

Welcome to Advanced Pricing

Work Queue

View Recently Created Price Lists

Name	Currency	Start Date	End Date	Active Status	Update	Details
No search conducted.						

Shortcuts

- [Create Price List](#)
- [Price List Maintenance](#)
- [Create Deal List](#)
- [Create Discount List](#)
- [Create Promotion List](#)
- [Create Surcharge List](#)

[Home](#) | [Lists](#) | [Diagnostics](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

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The following section describes the tasks that can be completed from the home page:

To search for price lists and modifiers:

1. In the Search field, select the pricing entity to search for:
 - Pricing List: To search for price lists.
 - Modifier List: To search for modifier lists.
2. Select a search category, then enter additional criteria to narrow your search results. For example, if you selected Price Lists and then Name, enter the specific name of the price list.
 - For Modifier Lists: Select Currency, Number, Type, Modifier Line Number, or Name.

- For Price Lists: Select Name or Currency.
3. Click Go to display the search results in the Lists tab.

Note: You can only view price and modifier lists, and depending on your security privileges, update lists.

To use the Shortcuts region:

The Shortcuts region provides the following links that enable you to quickly navigate to the pricing task or feature you want. For example, click the Create Price List link to create a price list. Select from the available Shortcut links:

- Create Price List: To create a new price list.
- Price List Maintenance: To maintain or update one or many price lists.
- Create Deal List: To create a Deal List.
- Create Discount List: To create a Discount List.
- Create Promotion List: To create a Promotion List.
- Create Surcharge List: To create a Surcharge List.

Click the link to display the related setup or feature pages. Additional online help for each topic is available by clicking the Online Help icon in the destination page.

To use the Work Queue region:

In the Work Queue region, you can view modifiers or price lists that you recently created. The Work Queue displays the price lists and modifier lists created by the user who is logged in.

1. In the Work Queue region, select the type of pricing entity to be viewed:
 - Recently Created Price Lists
 - Recently Created Modifier Lists
2. Click Go to display the entities in chronological order (newest to oldest). General information about each modifier list or price list is also listed in the table.
3. Optionally, click the Update icon to update the list, or click the Details icon to view additional details.

Related Topics

Updating a Modifier (HTML Interface), page 3-78

Using Modifiers in the HTML User Interface, page 3-47

Using Price Lists in the HTML User Interface, page 5-2

Updating a Price List (HTML Interface), page 5-46

Using Price Lists in the HTML User Interface

Oracle Advanced Pricing provides an HTML-based user interface (UI) that features guided steps, user-friendly pages, and shortcut links for setting up and maintaining modifiers, price lists, and qualifiers.

You can use the HTML UI to complete many of the pricing tasks that you previously completed in the Oracle Forms-based user interface such as:

- Searching for price lists and price list lines.
- Creating price lists.
- Creating price list lines.
- Maintaining price lists using the Price List Maintenance feature.
- Creating qualifiers for price lists.

Tasks available in HTML are identified with HTML Interface in the task title; for example, Creating a Price List (HTML Interface).

Oracle Advanced Pricing still provides the Oracle Form-based interface for completing tasks that are currently unavailable in the HTML interface such as creating qualifier groups.

Note: Pricing security can affect the View and Maintain features associated with the Update and Details icons in the HTML user interface. See *Oracle Advanced Pricing Implementation Manual, Pricing Security* for more information.

Related Topics

Using Oracle Advanced Pricing in the HTML Interface, page 1-4

Creating a Price List (HTML Interface), page 5-33

Creating Price List Lines (HTML Interface), page 5-37

Searching for Price Lists (HTML Interface), page 5-44

Creating Qualifiers (HTML Interface), page 2-4

Updating Price List Lines (HTML Interface), page 5-48

Using the Price List Maintenance feature (HTML Interface), page 5-50

Creating a Price List (HTML Interface)

Price lists are essential to ordering products because each item on an order must have a price. Each price list contains basic price list information and price list lines that define the items and their list prices. Creating a price list in the HTML user interface is a flow-based process that consists of the following guided steps:

1. Enter general price list information to define general information about the price list such as the price list name, effective dates, currency, pricing controls, rounding factor, and shipping defaults.
2. Create qualifiers that define eligibility rules for the price list. You can use qualifiers to restrict the price list to certain customers by qualifying customers for a particular price list. For example, the customer must be a Gold class customer to receive the price list.
3. Review and then save the price list.
4. Add price list lines which define the items on your price list and their list prices.

Note: Pricing security can affect the View and Maintain features associated with the Update and Details icons in the HTML user interface. Pricing security can affect the View and Maintain features associated with the Update and Details icons in the HTML user interface. See *Oracle Advanced Pricing Implementation Manual*, Pricing Security for more information.

To create a price list:

1. Navigate to the **Create Price List: General Information** page.

Create Price List: General Information page

ORACLE[®] Advanced Pricing [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Home](#) [Lists](#)

[Price Lists](#) | [Modifier Lists](#)

General Information Qualifiers Review

Create Price List: General Information

* Indicates required field [Cancel](#) Step 1 of 3 [Next](#)

* Name Freight Carrier

Description Freight Terms

Pricing **Order Fulfillment** Payment Terms

Transaction Entity

Source System **Oracle Pricing** Start Date (example: 22-FEB-2004)

* Currency End Date

Comments Round To

☒ Mobile Download

▼ Secondary Price Lists

Price List Name	Description	Precedence	Delete
NS-PriceList7i	HTML UI - PLL	140	

[Add Another Row](#)

[Cancel](#) Step 1 of 3 [Next](#)

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2. Enter the Name and Description for this price list.

Note: The price list Name should be unique across PTEs (Pricing Transaction Entities) otherwise an error occurs. For example, if a price list named Corporate is created in the Order Management PTE, an error message displays if you create a Corporate price list in the Purchasing PTE.

3. Select the default Freight Carrier.
4. Select the default Freight Terms.
5. Select the default Payment Terms such as Cash On Delivery (COD).
6. The Source System and Pricing Transaction Entity values default from the profiles QP: Pricing Transaction Entity and QP: Source System Code. For example, the Source System defaults as Oracle Pricing.

7. Enter the effective Start and End Dates.
8. Select a base Currency, page 5-3 for the price list such as USD (US dollars).
9. Select a Multicurrency-Conversion Criteria list. This field displays only if the profile QP: Multicurrency Enabled is set to Yes.
10. Enter any Comments.
11. Enter a Round To, page 5-3 value for the price list.
12. Select the Mobile Download box if you are using an Oracle Mobile application and want to download specific price lists onto a mobile device such as a laptop computer. The default value is No.
13. If the Pricing for Global Use box is selected, the price list can be used by all operating units for pricing transactions. If cleared, the price list's usage is restricted to the operating unit of the user creating the price list.

Note: The Pricing for Global Use box displays only if pricing security has been turned on.

Secondary Price Lists region

14. Click Add Another Row to add a blank row where you can select a secondary price list.
15. Click the Search icon, and select the price list to be attached as a secondary price list. The Description defaults based on the price list selected and is view-only.

The Precedence number defaults and can be updated.

Note: If the item is listed on multiple secondary price lists, the precedence value is used to determine which secondary price list the item is selected from.

The lower the precedence number, the higher its precedence ranking; so, for example, a secondary price list with a Precedence value of 100 is selected before a precedence of 200; a value of 200 is selected before 300 and so on.

Optionally, to delete this price list as a secondary price list, click Delete, then click Apply to save your changes.

16. Click Next to display the **Create Price List: Qualifiers** page. Qualifiers define the eligibility rules that define who qualifies for the modifier.
Define any qualifiers for the price list. See Creating Qualifiers (HTML Interface), page 2-4 for more information on setting up qualifiers.
17. When you have completed your entries, click Finish to skip the review page, or click Next to display the **Price List Review** page.

Create Price List: Review page

ORACLE Advanced Pricing [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

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[Price Lists](#) | [Modifier Lists](#)

General Information Qualifiers **Review**

Create Price List: Review

Currency = US dollar [Cancel](#) [Back](#) Step 3 of 3 [Finish](#)

Name	Corporate Price List	Freight Carrier	ABT-Air-1 Day
Description	Corporate price list for all customers.	Freight Terms	Prepaid
Pricing Transaction Entity	Order Fulfillment	Payment Terms	2/10, Net 30
Source System	Oracle Pricing	Start Date	
Currency	USD	End Date	
Comments		Round To	-2
Mobile Download	Yes		

Secondary Price Lists

Price List Name	Description	Precedence
NS-PriceList7i	HTML UI - PLL	140

Qualifiers

Qualifiers	Context	Operator	Value From	Value To	Start Date	End Date
No data exists.						

[Cancel](#) [Back](#) Step 3 of 3 [Finish](#)

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18. In the **Price List Review** page, you can review the following price list information before applying the final changes:

- General Information
- Secondary Price List
- Qualifiers

19. If changes are required, click the Back button to return to the page and make your changes. If no changes are required, click Finish to save the price list.

A Confirmation message confirms that the price list has been created and asks if you want to add price list lines. Price list lines define the items and prices for the price list.

Note: Once created, the price list remains in Inactive status. You must update the price list and select the Active box to activate the price list.

20. To add price list lines, click Yes. Click No, if you do not want to add price list lines now. You can add price list lines in the future.

Related Topics

Updating a Price List (HTML Interface), page 5-46

Creating Price List Lines (HTML Interface), page 5-37

Creating Price List Lines (HTML Interface)

You create price list lines to define the actual items on the price list and the list prices. When setting up a price list lines, you can define the prices by the following product levels:

- All Items (price applies to
- Item Number such as AS54888
- Item Category such as Hardware or Software
- iStore Section

Note: You must define the price list header before you can add price list lines.

You can use negative price, positive prices, or set the price to be zero. You can use modifiers to adjust the prices to your selling price.

To create price list lines:

1. Navigate to the **Update Price List: Price List Lines** page.

Update Price List: Price List Lines page

The screenshot displays the Oracle Advanced Pricing interface for updating price list lines. The page title is "Update Price List: Price List Lines". The interface includes a search section with fields for "Product", "Item Number", "UOM", "Start Date", and "End Date". There are also buttons for "Go", "Create Price List Line", and "Create Price Break Line". Below the search section is a table with the following columns: "Select Product Level", "Product", "Product Description", "UOM", "Value", "Start Date", "End Date", and "Update". The table currently shows "No data exists." at the bottom. The page also includes navigation links for "Home", "Lists", "Diagnostics", "Logout", "Preferences", and "Help".

Select Product Level	Product	Product Description	UOM	Value	Start Date	End Date	Update
No data exists.							

2. Select one of the following:
 - Click **Create Price List Line** to create a price list line.

Select this type to assign a unit or formula-based price to a product. For example, to add a line item AS54888 with a selling price of \$11 each.

- Click **Create Price Break Line** to create a price break line.

Select this type to create prices using a price break. Price breaks or bracket pricing can be used to define prices using different price tiers. For example, if ten items are ordered, the price is \$10 per item, but if twelve are ordered then the price drops to \$8 per item.

Complete the following steps when setting up either price list lines or price break lines:

Create Price List Line page

ORACLE Advanced Pricing Diagnostics Home Logout Preferences Help

Home Lists

Price Lists | Modifier Lists

Update Price List: Price List Lines >

Create Price List Line

Price List **js_Corporate Price List** Currency **USD** Cancel Apply

* Indicates required field

Start Date

(example: 21-Jun-2005)

End Date

Product

Product *

Product Description **Sentinel Standard Desktop**

* UOM

☒ Primary UOM

* Precedence

Pricing Attributes

Pricing attributes further define how you want to price the product. An example is 'Color is Red' where 'Attribute' equals 'Color' and 'Value' equals 'Red'.

Attribute	Context	Operator	Value From	Value To	Remove
<input type="text"/>		<input type="text" value="Is"/>	<input type="text"/>	<input type="text"/>	

Add Another Row

Price Detail

Line Type **Price List Line**

At least one value must be entered in either the Value or Formula field.

Application Method **Unit Price**

* Price

3. Select a Product:

- Item Number: Applies the price against a particular item number.
- Item Category: Applies the same price against items in the selected item category.
- All Items: Use All Items to apply the same price to all items in your product hierarchy.

The Product Description defaults based on the product selected.

4. Select a UOM (unit of measure) for the item, and select the Primary UOM box to indicate if the specified UOM is the primary unit of measure.

For example, an item such as A11111 in a price list may have two price list lines: one with a UOM of Each (EA)—the primary UOM—and the other with a UOM of Boxes. The pricing engine uses the pricing Primary UOM and the Oracle Inventory

UOM conversion information to price an order whose unit of measure does not have a price list line. If an order for item A11111 is placed in the unit of measure Case (CS), the pricing engine accesses the unit of measure conversion tables to convert Case to Each (EA) which is the primary unit of measure.

Note: The Precedence value defaults based on the Product Level. You can change the Precedence value if desired.

5. In the **Pricing Attributes** region, select an Attribute for the price list line. For example, if you selected toothbrush as the product, you can use attributes to define the type or color of toothbrush to be priced. In this example, the attribute is color.
 - **Value From/To:** Defines the attribute values. For example, if Color is selected as an attribute, then the values could be some color such as Red or White. If the operator value is *Is* or *Is Not*, then the Value To field does not display.
6. In the **Price Detail** region, the Line Type is Price List Line (read-only value). The default Application Method is Unit Price. This is the per unit price of the item:
 - Enter a list Price.
7. If using a formula to calculate prices, select a Formula Type and Formula name. At pricing time, the pricing engine calculates the price of the item using the formula:
 - For Static Formulas, run the Build Formula Package program, page 10-4 to calculate the value. The result of the calculation changes the Value.
 - For Dynamic Formulas, you only need to enter Value if the formula includes list price as one of the formula components.

To create a price break line:

Use price breaks (or bracket pricing) to define prices that vary with the quantity ordered. For example, buy up to 10 items and the price is \$20 per item, but if you buy more than 10 items, you get a lower price per unit. If you define a price for an item category, all the items within the category are eligible for the price break.

For additional pricing flexibility, a Block Price and Break Unit Price can be applied in a price break. This is commonly found in minimum price scenarios.

Note: The Line Type is Price Break (read-only).

Break Rules region

Price Detail

Line Type **Price Break**

Break Rules

The Break Rules determine the Break Details.

Break Type **Range**

Application Method **Block Price**

Volume Based On **Item Quantity**

Break Details

*Value From	*Value To	*Price	Application Method	Recurring Value	Remove
10	20	15	Block Price		
20	30	13	Block Price		

[Add Another Row](#)

[Cancel](#) [Apply](#)

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- Select a Break Type, page 3-60:
 - Point:** Price is based on the price bracket in which the *total* quantity falls.
 - Range:** Price based on the ranges of the defined price breaks. For each range, the engine calculates a price and sums across all ranges to obtain the total extended price. Select Range Break to set up a Recurring Value in the Break Details region.
- Select the Application Method:
 - Block Price:** Enables you to apply a lumpsum price rather than a per unit price to a pricing line. Like regular breaks, block pricing can be defined for either Point or Range price types. The following example describes a situation where a Block Price method can be applied:

 Shipments between 100 and 200 lbs cost a flat rate of \$50, regardless of the UOM. Without block pricing, the rate would be calculated by multiplying \$50 against the unit quantity. So a 100 lb shipment would be calculated at \$5000.00 (100 lbs X \$50) instead of \$50.00.

 Recurring Value: If Block Price is selected, you can define a Recurring Value that repeats a price for a defined interval; for example, to charge \$10 per 100 items up to 1000 items. In this example, the recurring value is 100.
 - Unit Price:** Defines the price for each item.
- If Unit Price is selected, complete these additional steps:
 - Select a Break UOM such as Each to define the unit of measure for the price break. The unit of measure (UOM) of the can be different from the pricing attributes of the child line.
 - Select a UOM Attribute.
- Select a Volume Based On:
 - Item Quantity:** Calculates based on the quantity of items ordered.
 - Item Amount:** Calculates based on item amount.

5. In the Details region, define the details for each price break range. Different setup steps are required depending on the Application Method (Block Price or Unit Price) you selected in the Rules region:
6. Enter a Value From/To range that defines the price break. For example, to define a break for the first 10 items ordered, create a range from 1-10. To do this, enter 1 in Value From and 10 in Break Value To.
7. Enter a Price.
8. Select an Application Method:

Note: The Application Method only appears for Range block price.

- Block Price: Applies a lumpsum price rather than a per unit price to a pricing line.
- Break Unit Price: Applies a per unit price; for example, \$0.30 per unit above 2000 units.

Note: For additional pricing flexibility, a Block Price and Break Unit Price can be applied in a price break. This is commonly found in minimum price scenarios. For example, a \$100 flat price is charged for 1 to 100 minutes of cellular phone usage, after which the customer is billed a Break Unit Price of \$1.00 per minute.

9. Enter a Recurring Value to define a price for a defined interval. When a recurring value is used with price breaks, the defined Block Price repeats for every interval defined in the Recurring Value field. For example, to charge \$10 per 100 items up to 1000 items (the Recurring Value would be the 100 value).

Note: If the ordered quantity does not fall in the price range of the price list, the price is still calculated and defaulted in the sales order line. Ensure that the price ranges are set up correctly to get the pricing results you desire:

For example, suppose you create the following range price breaks for price list Item AS54888 (Application Method is Unit Price):

- Value From/To: 1 to 5 Price: 1.00 each
- Value From/To: 6 to 7 Price: .75 each

If Price Type is Point: The price is not returned if the ordered quantity does not fall in the price range of the price list.

If Price Type is Range: A price of 0 is retrieved for the ordered quantity that does not fall in the price range.

For example, if a Sales Order for 10 items of AS54888 were placed, the price would be calculated as follows (Price Type is Range):

$$(5*1) + (2*0.75) + (3*0)/10 = 0.65 \text{ Unit Price}$$

Notice that the last 3 items fall out of the price range and therefore a unit price of 0 is returned. Therefore it is important that the price breaks are set up correctly to get the desired price results.

To enter Break Details (Block Price selected as Application Method)

1. Enter a break Value From/To range that defines the price break. For example, to define a break for the first 10 items ordered, create a range from 1-10. To do this, enter 1 in Value From and 10 in Value To.

Break Rules region

Break

Break Rules



The Break Rules determine the Break Details.

Break Type

Application Method

Volume Based On

Break Details

Value From	Value To	Price	Application Method	Recurring Value	Delete
<input type="text" value="10"/>	<input type="text" value="20"/>	<input type="text" value="15"/>	<input type="text" value="Block Price"/>	<input type="text" value="5"/>	
<input type="text" value="20"/>	<input type="text" value="30"/>	<input type="text" value="13"/>	<input type="text" value="Block Price"/>	<input type="text" value="5"/>	

Add Another Row

Cancel

Apply

2. Enter a Price.
3. Select an Application Method:
 - Block Price: Applies a lumpsum price rather than a per unit price to a pricing line.
 - Break Unit Price: Applies a per unit price; for example, \$0.30 per unit above 2000 units.
4. Enter a Recurring Value to define a price for a defined interval. When a recurring value is used with price breaks, the defined Block Price repeats for every interval defined in the Recurring Value field. For example, to charge \$10 per 100 items up to 1000 items (the Recurring Value would be the 100 value).
5. To create additional breaks, click Add Another Row. To delete a price break, click the Delete icon.
6. Click Apply to save your changes. A Confirmation message displays if the price list line was successfully created.

To enter Break Details (Unit Price selected as Application Method)

1. In the Break region, enter a break Value From/To range that defines the price break. For example, to define a break for the first 10 items ordered, create a range from 1-10. To do this, enter 1 in Value From and 10 in Value To.

Break region

Break

Break Rules
The Break Rules determine the Break Details.

Break TypePoint
Application MethodUnit Price
Volume Based OnItem Quantity

Break UOMEABreak UOM AttributeUsage UOM

Break Details

Value From	Value To	Price	Delete
10	20	15	
20	30	13	

Add Another Row

CancelApply

2. Enter a unit Price for the break.
3. Click Apply to save your changes. A Confirmation message displays if the price list line was successfully created.

Note: If the ordered quantity does not fall in the price range of the price list, the price is still calculated and defaulted in the sales order line. Ensure that the price ranges are set up correctly to get the pricing results you desire:

For example, suppose you create the following range price breaks for price list Item AS54888 (Application Method is Unit Price):

- Value From/To: 1 to 5 Price: 1.00 each
- Value From/To: 6 to 7 Price: .75 each

If Price Type is Point: The price is not returned if the ordered quantity does not fall in the price range of the price list.

If Price Type is Range: A price of 0 is retrieved for the ordered quantity that does not fall in the price range.

For example, if a Sales Order for 10 items of AS54888 were placed, the price would be calculated as follows (Price Type is Range):

$$(5*1) + (2*0.75) + (3*0)/10 = 0.65 \text{ Unit Price}$$

Note: Notice that the last 3 items fall out of the price range and therefore a unit price of 0 is returned. Therefore it is important that the price breaks are set up correctly to get the desired price results.

Related Topics

Creating a Price List (HTML Interface), page 5-33

Searching for Price Lists (HTML Interface)

In the **Price Lists** page, you can search by price list name, currency, dates, or status to find information essential to your business such as:

- All price lists in a specific currency.
- Specific price lists.
- All price lists created on a specific date.

You can specify additional search criteria to narrow your results. For example, you can specify the type of currency such as USD (US dollars) to find only price lists with USD as the base currency.

Once the search results are returned, you can view a summary of price lists or select a specific price list to view additional details. In addition to viewing the price list, you can choose to update a selected price list, or create a new price list.

Note: You must be assigned Maintain privileges in pricing security to update or create a new price list. The Details icon is enabled if you have view or update privileges assigned through pricing security.

To search for price lists:

1. Navigate to the **Price Lists** page.

Price Lists page

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[Price Lists](#) | [Modifier Lists](#)

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Price Lists

Search

Search

Price List Name	Currency	Active Status	Start Date	End Date	Update	Details
No search conducted.						

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2. Select a search category from the Search list, then enter additional criteria (where applicable) to narrow your search results. Select from the following search categories:
 - Currency: Select a specific currency such as USD (US dollars) to find all modifier lists set up in USD.
 - Dates: Search by price list dates. These Start and End Dates must match exactly to the dates in the price list setup.
 - Price List Name: Search by the price list name. Enter a specific name or enter the Wildcard character (%) to list all price lists.
 - Status: Search by Active or Inactive price lists.
 - Active: Finds all Active modifier lists.
 - Inactive: Finds Inactive modifier lists.
3. Click Go to display the search results in a table.
4. Optionally, select a price list, and click Update to update the price list, or click Details to view price list details.

Related Topics

Creating a Price List (HTML Interface), page 5-33

Updating a Price List (HTML Interface), page 5-46

Searching for Price List Lines (HTML Interface), page 5-45

Searching for Price List Lines (HTML Interface)

You can search by the following criteria to find price list lines within a specific price list:

- Dates: To search by a specific date range.
- Items: To search by Item(s).

To search for price list lines (HTML Interface):

1. Navigate to the **Update Price List: Price List Lines** page.

Update Price List: Price List Lines page

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Diagnosics Home Logout Preferences Help

Home Lists

Price Lists | Modifier Lists

Lists: Price Lists > Update Price List: General Information

Update Price List: Price List Lines

Price List Corporate Cancel Apply

Search

Search Items

Item Number

UOM

Item Category

Go

Select Object: Delete Create Line Previous 1-10 Next 10

Select All Select None

Select	Product Level	Product	Product Description	UOM	Value	Start Date	End Date	Update
<input type="checkbox"/>	Item Number	EVE0116	Vision EBusiness Expo	Ea	130	01-JAN-1996		
<input type="checkbox"/>	Item Number	PM-KIT01	PM KIT01 (1 Shippable and 1 NShippable Items)	Ea	50	01-JAN-1996		
<input type="checkbox"/>	Item Number	PM-KSITEM01	PM-KIT Shippable Item01	Ea	100	01-JAN-1996		
<input type="checkbox"/>	Item Number	PM-KNSITEM01	PM-KIT Non Shippable Item01	Ea	200	01-JAN-1996		
<input type="checkbox"/>	Item	PM-NSITEM02	PM Standard Non-	Ea	200	01-JAN-		

2. Select the Search criteria:
 - Dates: To search by a specific date range. Enter the Start Date and End Dates to find price list lines within a specified date range.
 - Items: To search by Item(s). To define additional search criteria, select Item Number or a combination of (Item Number and UOM) or (Item Category). You cannot search just by UOM.
3. Click Go to display the price list lines related to the price list.

Updating a Price List (HTML Interface)

In the **Update Price List: General Information** page, you can update general details about the price list such as the description, currency, active status, and other information.

Note: Pricing security can affect the View and Maintain features associated with the Update and Details icons in the HTML user interface. See *Oracle Advanced Pricing Implementation Manual*, Pricing Security for more information. You must be assigned Maintain security privileges to update the price list, otherwise only the Details icon is enabled.

To update a price list:

1. Navigate to the **Update Price List: General Information** page.

Price List: General Information page

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[Price Lists](#)

Update Price List: General Information

* Indicates required field

Name	Corporate	Freight Carrier	
Description	Corporate Price List	Freight Terms	Prepay & Add
Pricing	Order Fulfillment	Payment Terms	30 Net
Transaction Entity	Oracle Pricing	Start Date	01-JAN-2002
Source System		End Date	
* Currency	USD	Round To	-15
Comments			
<input type="checkbox"/> Mobile Download		<input checked="" type="checkbox"/> Active	

Secondary Price Lists

Previous 1-5 Next 5

Price List Name	Description	Precedence	Delete
PL-HTML-8		140	
PL-HTML-308		140	
PL-HTML-23		140	

- Make any required changes or corrections to the price list. You can update the following fields:
 - Freight Carrier/Terms
 - Description
 - Payment Terms
 - Currency
 - Active box: If selected, then the price list is active. If cleared, then the price list is inactive and will not be available for pricing orders.
 - Start/End Dates
 - Comments
 - Multi-currency Conversion
 - Round To
- In the Secondary Price List, page 5-3 region, you can update any secondary price lists. If no secondary price list is listed, click Add Another Row to add a secondary price list.
- Click Apply to save the changes. A Confirmation note displays if the price list was updated successfully.

Note: It is important to familiarize yourself with certain navigational flow considerations in the HTML user interface when updating, changing, saving, or deleting data for price

lists, modifiers, qualifiers, and their related lines. See Navigation flow , page 1-6 for more information.

Related Topics

Creating a Price List (HTML Interface), page 5-33

Updating Price List Lines (HTML Interface), page 5-48

Updating Price List Lines (HTML Interface)

Once a price list line has been created, you may need to occasionally update the information; for example, to change the price or unit of measure. The **Update: Price List Lines** page enables you to search for price list lines (within the selected price list), display the price list lines, update information for a price list line, and apply the changes.

To change price list line information across multiple price lists, for example, to change the price of an item listed on several price lists, consider using the price list maintenance feature. This saves you time from updating each price list separately.

Note: You cannot update the Product level or Product fields. The Product Description is read-only.

In addition to updating a price list line, you can add or delete an existing line.

To update price list lines:

1. Navigate to the **Update Price List: Price List Lines** page. Price list lines related to the price list display in a table.

Optionally, in the Search region, select the Search criteria to find specific price list lines for the price list, then click Go to display the search results.

Update Price List: Price List Lines page

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Home Lists

Price Lists | Modifier Lists

[General Information](#) [Lists : Price Lists](#) > [Update Price List: General Information](#)

Update Price List: Price List Lines

Price List **Corporate** Cancel Apply

Search

Search

Item Number

UOM

Item

Category

Select Object: | Previous 1-10 Next 10

Select All | Select None

Select	Product Level	Product	Product Description	UOM	Value	Start Date	End Date	Update
<input type="checkbox"/>	Item Number	EVE0116	Vision EBusiness Expo	Ea	130	01-JAN-1996		<input type="button" value="Update"/>
<input type="checkbox"/>	Item Number	PM-KIT01	PM KIT01 (1 Shippable and 1 NShippable Items)	Ea	50	01-JAN-1996		<input type="button" value="Update"/>
<input type="checkbox"/>	Item Number	PM-KSITEM01	PM-KIT Shippable Item01	Ea	100	01-JAN-1996		<input type="button" value="Update"/>
<input type="checkbox"/>	Item Number	PM-KNSITEM01	PM-KIT Non Shippable Item01	Ea	200	01-JAN-1996		<input type="button" value="Update"/>
<input type="checkbox"/>	Item	PM-NSITEM02	PM Standard Non-	Ea	200	01-JAN-		<input type="button" value="Update"/>

2. Select the price list line to be updated, and click Update to display the price list line in the **Update Price List Line** page.
3. Update the information that requires changes, then click Apply to save your changes.

Related Topics

Using the Price List Maintenance feature (HTML Interface), page 5-50

Creating Price List Lines (HTML Interface), page 5-37

Archiving, Deleting, and Purging Price List Information

You cannot delete a price list once it has been created. However, when a price list is no longer required, you can enter an end date when the price list becomes inactive. You can delete price list lines.

For price list lines, you can use the archive feature to archive price list lines from the pricing application tables to archiving tables for long-term data storage. Once the pricing data is copied to the archive tables, it is deleted from the application tables.

Note: Price list and modifier list header information is copied to archive tables but is not deleted from the pricing application tables.

When the archived data is no longer required, you can purge the data from the archive tables.

Related Topics

Archiving Pricing Entities, page 6-2

Purging Pricing Entities, page 6-6

Using the Price List Maintenance feature (HTML Interface)

Use the Price List Maintenance feature to make changes to price list lines for a single price list or across many price lists. The frequency of these changes depend largely on your business processes and how often you update your prices--daily, monthly, quarterly, or annually. To make changes, search for the price list or price list lines to be changed in the Price List Maintenance page, then do a detail change or bulk change to update the value, formula or effective dates. Changes can be made for a single price list or across multiple price lists for price list lines.

For example, you could adjust all plastic items by 3%, metal items by 5%, and extend the end date from September 30, 2005 to December 31, 2005 for a Corporate price list. Depending on your business requirements, click either the Detail Change or Bulk Change button to make changes.

After applying your changes, you can review the results in the **Review Changes** page. This is useful for modelling your pricing scenarios before submitting the final changes.

Note: You must have Maintain privileges to make any updates. If you are unable to access or update this window, you may not have the appropriate access privileges. Consult your Pricing Administrator.

You can use Price List Maintenance to complete the following tasks:

- Search for price lists and price list lines
 - Do simple or advanced searches for a single or multiple price lists/price list lines.
 - Display search results in a hierarchal format.
- Make changes to price lists and price list lines
 - Do detail changes or bulk changes to change price list lines for a single price list or across price lists.
 - End date and create new line in Bulk Change.
 - Duplicate line in Detail Change.
 - Do mass maintenance across multiple price lists.

Note: You can only select those price list lines with Line Type of Price List Line. Price list lines with Line Type of Price Header cannot be selected. You cannot select price lists that belong to a different pricing transaction entity (PTE) or source system.

Searching for Price Lists and Price List Lines (HTML Interface)

Use the Price List Maintenance feature to do simple or advanced searches to find price lists and price list lines:

- Search: Search by price list name (for example, Spring price list), product attribute, product value, and product description.
- Advanced Search: Search by price list header details, line details, pricing attribute details, qualifier details, and secondary price list details.

Note: You can also search for price lists from the **Price Lists Search** page. See Searching for Price Lists (HTML Interface), page 5-44.

You can search across one price list or multiple price lists. For example:

- Find all price lists where the price list header specifies Start Date = 12 Dec 2000 AND Price List Header End Date = 12 Feb 2002
- Find all price lists where price list has a qualifier specifying Customer Name = Vision Operations AND where a price list line specifies Product Attribute of Item Number = telephone
- Find all price lists where one or more of the price list lines specifies Item Category = Soda and Pricing Attribute = Diet

To do a simple search:

1. Navigate to the Price List Maintenance page.

Price List Maintenance page: Search region

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Price List Maintenance

To maintain price lists, [search](#) across price lists and select the lines from the results.

Simple Search

Enter at least one search criteria to search across price lists. Advanced Search

Price List Name

Product Level

Product Value

Product Description

Value depends on Product Level

Value depends on Product Level

Go

Select	Description	UOM	Value	Static Formula	Dynamic Formula	Start-End Date
<input type="checkbox"/>	No data exists.					

☒ **TIP** For Bulk Change, the same updates are made across all the selected lines. For Detail Change, updates can be made for each line separately. Select the price list to update all the lines of the price list. Only price list lines can be updated.

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2. In the Search region, select only the criteria required for your search:

- Price List Name: Select a price list name.

- **Product Level:** Select a product attribute such as Item number or Item Category.
- **Product Value:** Select a particular product value for the selected product attribute. You must select a product attribute before you select a product value.
- **Product Description:** This displays the description of the product value. The product attribute must be entered first before the Product Description can be entered.

Note: Click the Search icon (where applicable) to display the available values for a field. Also, in some blank fields, you can use the wildcard character (%) to narrow your search results; for example, enter Co% to display all the price lists beginning with Co.

3. When you have completed your entries, click Go to display the search results.

The search results display detailed information about each price list including price list lines, pricing attributes, and qualifiers. By clicking the Expand icon for a selected price list, you can view the price list lines and qualifiers for the price list.

Note: Only price list lines can be updated in this feature. You cannot update price break lines in Price List Maintenance.

To do an advanced search:

1. Navigate to the Price List Maintenance page.
2. Click Advanced Search to display the Advanced Search page.

Advanced Search page

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Advanced Search

Enter at least one [search](#) criteria and press the Search button to search across price lists. Cancel Search

Header

Price List Name

Round To

Active

Currency

Start Date
(example: 23-May-2005)

End Date

Payment Terms

Freight Terms

Freight Carriers

Line

Product Level

Product Value
Value depends on Product Level

Product Description
Value depends on Product Level

UOM

Dynamic Formula

Static Formula

Precedence

Application Method

Value

Line Type

Price Break Type

Primary UOM

Start Date
(example: 23-May-2005)

End Date

Pricing Attribute

Pricing Context

Value From
Value depends on Pricing Attribute

3. Select your search criteria.

Note: Click the Search icon (where applicable) to display the available values for each field.

4. When your entries are selected, click Search to display the search results. The search results display in the Price List Maintenance page.
5. From the search results, select the check box next to the price list and/or price list line(s) to be changed. You can change pricing entities such as Value, Pricing Formula, and the Start and End Dates of price list lines.

When a price list is selected, all the price list lines in the search results for that price list will be available for change.

Note: You can only select those price list lines with Line Type of Price List Line. Price list lines with Line Type of Price Header cannot be selected. You cannot select price lists that belong to a different pricing transaction entity (PTE) or source system.

To view the search results:

The search results display in the Results region of the **Price List Maintenance** page with the price list being the top-most node. Click the Expand icon (+) next to the price list name to view additional details nested beneath the node. For a price list, you can view related information pertaining to the selected price list such as price list lines, qualifiers and related information. To view a particular price list if more than one is listed, click the Focus icon. Use the Focus icon to select a particular entity to examine it in more detail.

Price Lists node

The top node is the Price Lists node if your results include more than one price list. If you have a single price list returned in your search results, then the price list name itself is displayed as the top node.

If you click a price list node, for example, Corporate Price List, then two additional nodes display: a Lines node and a Qualifier node. Each row under this node identifies the price list name and its description.

Lines node

Click the Lines node to display the price list lines (of the price list) which meet the search criteria. Each price list line displays the item number, item description, unit of measure, value, static or dynamic formula, start date and end date. If no line criteria such as lines, products and pricing attributes are entered in the search criteria, all the price list lines of the price list are displayed.

Also, if a price list line has associated price breaks or pricing attributes, the Expand icon (+) displays next to the product attribute value. Click the Expand icon (+) for the product attribute value to display the Breaks and Pricing Attributes node.

Price Breaks node

Click the Price Breaks node to display all the price breaks for the product attribute value. Each row displays the individual price breaks along with the value.

Pricing Attributes node

Click the Pricing Attributes node of the product attribute value to display the pricing attributes that match the query criteria. If no pricing attribute criteria is entered in the

Search Criteria, all the pricing attributes of the price list line display. Each row displays the pricing attribute and pricing attribute value.

Qualifiers node

Click the Qualifiers node to display all the qualifiers of the price list which meet the search criteria. If no qualifier criteria is entered in the Search Criteria, all the qualifiers of the price list are displayed. Each qualifier displays the qualifier attribute and qualifier attribute value in the Description column.

Qualifiers node

Select Price Lists/Price List Lines								
<div>Bulk ChangeDetail Change</div>								
<div>Select AllSelect NoneExpand AllCollapse All</div>								
⊕								
Select Focus			Description	UOM	Value	Static Formula	Dynamic Formula	Start-End Date
<input type="checkbox"/>		▼ JST_RT_6	USD pl with sec pl, with qualifier					15-DEC-2003-
<input type="checkbox"/>	⊕	▶ Lines						
<input type="checkbox"/>	⊕	▼ Qualifiers						
<input type="checkbox"/>		Customer:Customer Name	Computer Service and Rentals -					

Making Detail Changes across a Selected Group of Lines

For Detail Changes, updates must be made for each price list line separately. So, for example, to increase the price for selected items on a price list you would have to manually update each price list line separately.

If there are overlapping dates for a product on a price list, an error message displays; for example, if you end date a price list line when the item is no longer sold.

To make detail changes:

- 1. After you have completed your search in the **Price List Maintenance** page, select the price list(s) or price list lines to be changed.
- 2. Click Detail Change to display the **Detail Change: Make Changes** page.

Detail Change: Make Changes page

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Detail Change: Make Changes

Updates are made for each line separately. Only price list lines can be updated.

[Cancel](#) [Refresh Data](#) [Continue](#)

	Price List Name	Product Level	Product Value	Product Description	Duplicate	New Line	UOM	Value	Type of Value Change	Value Change By	Changed Value	Line Start End Date
Show	Corporate	Item Number	AS54888	Sentinel Standard Desktop		<input type="checkbox"/>	Ea	2599	No Change		2599	-

☒ **TIP** When duplicating a line, remember to end [date](#) the previous line.

[Cancel](#) [Refresh Data](#) [Continue](#)

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In this page, you can update selected price list lines. To view additional details about a price list line, click Show. For each price list line, you can make the changes to the existing line. You can also click the Duplicate Line icon and then make changes to the new price list line.

3. To change the value of a price list line, for example, to increase its price, select the Type of Value Change. Select one of the following values:
 - No Change: The value of all the price list line remains the same.
 - Replace Value: The value of the price list line will be changed to the value entered in the Value Change By field.
 - Amount: The value of the price list line will be increased/decreased by the value entered in the Value Change By field.
 - Percent: The value of the price list lines will be increased/decreased by the percentage value entered in the Value Change By field.
 - Clear Value: The value of all the price list lines is changed to Null.
4. If you selected Replace Value, Amount, or Percent in the Type of Value Change field, enter a value or percentage in the Value Change By field.

The Changed Value field displays the changed value once you have completed your changes and click Refresh Data.

For example, if the original value is 100, and you enter the following:

- Type of Value Change: Increase by Percent

- Value Change By: 10

After you click Refresh Data, the Changed Value field displays 110.

5. Enter a Changed Start Date to replace the existing start date. You can then make further changes to the Changed Value for this price list line.
6. Enter a Changed End Date to replace the price list line end date.
If the price list line has a dynamic formula or static formula attached, the formula name is displayed in either the Static Formula or Dynamic Formula field.
7. To update or add a static or dynamic formula for a price list line, make your changes in the Static Formula or Dynamic Formula field. Select only one type of formula.
Note: To update or add a formula value, click the Search icon next to the Changed Static Formula or Changed Dynamic Formula fields to view the available static and dynamic formulas.
8. Click the Duplicate Line icon to duplicate the current line. You can change values of the current and the duplicated line.
9. Click Refresh Data or Continue process the changes.

Example of Detail Change:

This example shows how to use the Detail Change page to make the following changes to price list lines for a fictitious price list (Corporate):

- Increase the price for price list line Item A by 10%.
 - Add a formula to calculate price for price list line Item B.
 - Create a new price list line for Item C and change the Start and End Dates.
1. From the **Price List Maintenance** page, search for the Corporate price list.
 2. Select the Corporate price list and click Detail Change to display the Detail Change page.
 3. Select or enter the following values for each price list line to be changed:
 - To increase the price for price list line Item A by 10%.
 1. Type of Value Change = Percent
 2. Value Change By = 10
 - To add a formula to calculate price for price list line Item B.
 1. Click the Changed Static Formula or the Changed Dynamic Formula icon to select one of the available formulas. Select one formula type or the other, not both.
 - To create a new price list line for Item C and change the Start and End Dates.
 1. Click the Duplicate Line icon for Item C to duplicate the price list line. When duplicating a line, remember to end date the previous line.
 2. For the new line, enter the new Start Date and optionally, the End Date. When duplicating a line, ensure that the effective dates for a price list line do not overlap. Change the effective dates of the overlapping line

to make the price list line unique. The New Line box is selected to indicate new lines.

4. Click Refresh Data to view all the updated and newly-created price list lines.
5. If satisfied with your changes, click Continue to go to the **Detail Change: Review Changes** page.
6. Click Finish to save the changes. A Confirmation message confirms if all changes to the price list lines have been saved.

Making Bulk Changes across a Selected Group of Lines

The Bulk Change feature enables you to make the same updates across all selected price list lines: for example, to adjust the price by \$5. This saves time from updating each price list line separately. These changes are made in the **Bulk Change: Make Changes** page.

Unlike the Detail Change feature, which requires you to update each price list line separately, the Bulk Change feature enables you make your changes once and update all selected price list lines. For example, bulk change could be used to:

- Adjust all lines on Corporate Price list and Spring Price List by 10%
- Adjust all lines on VIP price list and the first two price list lines of Fall price list (out of 10 price list lines) and change the end date to 12-Dec-2002.

When making changes to the price list line, you can end date the existing line and create a new price list line with the changes. The existing line will be end-dated, and the changes are reflected only in the new line.

In Bulk Change, you can choose to make a date change by selecting either the Override option or End Date and Create New option from the Action region. When end dating and creating a new line, you can also retain the existing start/end dates. Otherwise, they can override the start/end date of the existing line.

If there are overlapping dates for a product on a price list, the system will display an error; for example, if you end date a price list line when the item is no longer sold.

Examples of Using Bulk Changes:

The following examples describe how to change values for price list lines using the bulk change feature:

Example 1: Bulk Change to increase all price list lines on Corporate Price list and Spring Price List by 10%

From the Price List Maintenance page, do a search to find the Corporate Price List and Spring Price List. For example, you could do an Advanced Search using a qualifier such as Order Type = Standard to display related price lists. Click Search to view the results.

1. Select the Corporate and Spring price lists from the results and click Bulk Change to display the **Bulk Change: Make Changes** page.
2. Select the following values:
 - Override box = Selected
 - Type of Value Change = Percent
 - Change By = 10

3. Click Refresh Data to view the new changes. All the price list lines of the Corporate and Spring price lists display with the changes applied as above.
4. Click Continue to display the **Bulk Change: Review Changes** page.
5. Click Finish to save the changes. A Confirmation message displays on the Price List Maintenance page.

Example 2: Bulk Change to override the end date for selected lines

The following example shows how Bulk Change can be used to adjust all lines on the VIP price list and the first two price list lines of the Fall price list (out of 10 price list lines). The end date of the price list lines will also be changed to 12-Dec-2003.

1. In the Advanced Search page, do a search to find the VIP and Fall price lists.
2. Select the VIP price list. For the Fall price list, click the Expand icon to view all the price list lines, then select the first two list lines.
3. Click Bulk Change to display the **Bulk Change: Make Changes** page. In the Maintenance Criteria region, select the following values:

Field Name	Value
Override box	Selected
Type of Date Change	Change Dates
Existing End Date	December 12, 2003

4. Click Refresh Data to review your changes.
5. All the lines of VIP price list and first two price list lines of the Fall price list are displayed in a table with the changes applied as above.
6. Click Finish to display the **Bulk Change: Review Changes** page.
7. Click Finish to save the changes. A confirmation message is also displayed.

Example 3: Bulk Change to change price by 10% for a specific item

The following example shows how the bulk change feature can be used to adjust the price for an item category, for example, orange juice, for all price lists. The current prices will be end-dated by May 31st and the new prices (discounted 10%) will take effect from June 1, 2003 to August 3, 2003.

1. In the Advance Search page, select the following search values:

Field Name	Value
Product Attribute	Item Category
Product Value	Orange Juice

2. Click Search to view your search results.
3. Select all price lists and click Bulk Change to display the **Bulk Change: Make Changes** page.
4. In the Maintenance Criteria region, select the following values:

Field Name	Value
End Date and Create New	Selected
Type of Date Change	Change Dates
Existing End Date	May 31, 2002
Retain Existing Start Date box	Selected
New Start Date	June 1, 2003
New End Date	August 31, 2003
Type of Value Change	Percent
Change By	10

- Click Apply. All the lines of the Corporate price list are displayed with the changes applied as above.
- Click Next to go to the **Bulk Change: Review Changes** page.
- Click Submit to save the changes. A confirmation message confirms that the changes have been made.

Example 4: Bulk Change to an item to a Dynamic Formula

The following example shows how Bulk Change can be used to update the price of item AS54888 on Vision Operations' price lists to a Dynamic Formula (F1) by clearing the Value and attaching a dynamic formula.

- In the Search Price Lists region of the Price List Maintenance page, enter the search criteria:

Field Name	Value
Name	Vision Operations
Product Attribute	Item Number
Product Value	AS54888

- Click Go to view the results.
- Select the Vision Operations price list and then click Bulk Change to display the **Bulk Change: Make Changes** page.
- In the Maintenance Criteria region, select the following values:

Field Name	Value
Override	Selected
Type of Formula Change	Replace All Formulas with Dynamic Formula
Name	F1
Type of Value Change	Clear Value

5. Click Refresh Data to review the applied changes.
6. Click Continue to display the **Bulk Change: Review Changes** page.
7. Click Finish to save the changes. A confirmation message confirms that the changes have been made.

To make bulk changes across a selected group of line:

1. After you have completed your search in the Price List Maintenance page, select the price lists or price lines to update.
2. Click Bulk Change to display the Bulk Change: Make Changes page. The Bulk Change feature enables you to do the same change across all the selected lines rather than to update each line separately (Detail Change).

Bulk Change: Make Changes page

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Bulk Change: Make Changes

Updates are made across all selected lines. Cancel Refresh Data Continue

☒ TIP Any changes to these lines are based on the search results.

Price List Lines

Show All Details | Hide All Details

Details	Price List Name	Product Level	Product Value	Product Description	UOM	Value	New Line	Changed Value	Line Start/End Date	Changed Start Date	Changed End Date
Show	Corporate	Item Number	A854888	Sentinel Standard Desktop	Ea	2599	<input type="checkbox"/>	2599	-		

Maintenance Criteria

Action

☐ End Date and Create New

☒ Override

Effective Date

To keep the existing start date of the price list line, leave the "Start Date" field blank and check "Retain Existing Start Date". To keep the existing end date of the price list line, leave the "End Date" field blank and check "Retain Existing End Date".

Type of Date Change: No Change

Start Date: Retain Existing Start Date ☒

End Date: Retain Existing End Date ☐

New Line Start Date:

The selected price list lines display in the Price List Lines region of the **Bulk Change: Make Changes** page. To view additional details about a price list line, click Show.

In the Maintenance Criteria region, you can make changes to the effective Start and End Dates, Formula, and Value and apply these changes to the price list lines.

3. In the Action region, select one of the following:
 - End Date and Create New: Each selected price list line is end-dated and a new price list line is created with the changes specified in the Effective Date, Formula and Value regions. The Start Date or End Date for each price list line is updated.

This is useful for keeping a version history of a price list line. If there are multiple price list lines for the same item (with different effectivity dates), the price list line with the most forward effectivity dates will be end dated and a new line will be created. Any changes will be reflected on the new line.

- Override: Each selected price list line will be updated with the changes you specify in the Effective Date, Formula and Value regions.
4. Select the Type of Date Change:
 - No Change: The dates remain the same.
 - Change Date: The dates are changed to those entered in the Start Date, End Date, New Line Start Date, and New Line End Date.
 5. If you selected Change Date in the Type of Date Change field, enter the new dates in the following fields:
 - Start date: This changes the start date of all the price list lines.
 - End date: This changes the end date of all the price list lines.
 - New Line Start Date: This date changes the start date of all the new price list lines created as a result of choosing the Action: End Date and Create New.
 - New Line End Date: This date changes the end date of all the new price list lines created as a result of choosing the Action: End Date and Create New.
 - Retain Existing Start Date box: If selected, you do not need to enter a Start Date for the existing line. If cleared, the date in the Start Date field replaces the current Start Date.
 - Retain Existing End Date check box: If selected, you do not need to enter an End Date for the existing line. If cleared, the date in the End Date field will replace the current End Date.
 6. In the Formula region, select the Type of Formula Change:
 - No change: The formulas remain the same.
 - Remove Static and Dynamic Formula: You can select from Any Formula or from available formula names. If you select a particular formula, then the matching formula attached to the price list lines will be removed. If Any Formula is selected, all formulas will be removed from price list lines.
 - Replace All Formulas with Dynamic Formula: The Dynamic Formula of all the price list lines will be changed to the Formula entered in the Name field.
 - Replace All Formulas with Static Formula: The Static Formula of all the price list lines will be changed to the Formula entered in the Name field.
 7. Select the Formula Name. Do not select a Formula Name if you selected No Change from the Type of Data Change list. Click the Search icon to display all the dynamic and static formulas.

Note: Formulas with Modifier Value as a formula type will not be displayed in the List of Values.
 8. In the Value region, select how the value should be changed for the selected price list lines:
 - No Change: The value of all the price list lines remains the same.

- **Replace Value:** The value of all the price list lines will be changed to the value entered in the Change By field.
 - **Amount:** The value of all the price list lines will be increased/decreased by the value entered in the Change By field.
 - **Percent:** The value of all the price list lines will be increased/decreased by the percentage value entered in the Change By field.
 - **Clear Value:** The value of all the price list lines is changed to Null.
9. When you have completed your entries, click Refresh Data to view your changes.

Note: Any validation errors display at the top of the page. You may be able to resolve the error by changing the start and end date values for the price list line.

The **Bulk Change: Make Changes** page displays both the new and original values.

10. Click Continue to review the updated price list lines:
- **Changed Value (view-only):** Displays the changed value if you entered a value for Type of Value Change and Value Change By.
For example, if the original Value = 100, and you selected Type of Value Change = Increase by Percent, and Value Change By = 10 and clicked Apply, the new Changed Value that displays is 110.
 - **Changed Start/End Date:** Displays the changed start and end dates.
 - **Changed Static Formula:** Displays the changes static formula.
 - **Changed Dynamic Formula:** Displays the changed dynamic formula.
11. To make revisions (for Bulk Changes), change your entries in the Maintenance Criteria region and click Continue or Refresh Data to process your changes.

Note: If you click Refresh Data, the changes are applied to the original value displayed on the price list lines in the search results, not to the price list line values which are currently in the Bulk Change Window. This means if you updated your price list by 10% from 100 to 110, and you decide you wanted to update to 20%, the price is now 120, not 132.

Viewing Validation Errors:

Any validation errors are displayed at the top of the page where the error occurred. Depending on the error, you can change the values in this price list line to resolve the error. Click Refresh Data again to ensure the error disappears.

Note: Whenever you change the maintenance criteria and click Refresh Data, the changes are applied to the price list lines, not to the price list lines values.

Archiving and Purging Pricing Entities

This chapter covers the following topics:

- Overview of Archiving and Purging Pricing Entities
- Archiving Pricing Entities
- Purging Pricing Entities

Overview of Archiving and Purging Pricing Entities

Archiving pricing data enables you to copy pricing data from the pricing application tables to archive tables for long-term data storage.

You can archive price list and modifier lines. The archiving process permanently removes the lines from the related price list or modifier list into the archive tables for storage.

When the archived data is no longer required (and does not need to be retained for legal requirements), then you can use the purge feature to purge the data from the archive tables.

You can archive and purge price list lines and modifier list lines for the following price list and modifier list types:

- Agreement Price List
- Standard Price List
- Deal
- Discount List
- Freight and Special Charge List
- Promotion
- Surcharge List

Archiving and purging records reduces the number of pricing records that the pricing engine queries, potentially improving processing performance.

Related Topics

Archiving Pricing Entities, page 6-2

Purging Pricing Entities, page 6-6

Archiving Pricing Entities

Archiving your pricing data enables you to store pricing setups that are no longer active or infrequently used. You can use the Archive Pricing Entities window to archive modifier lines and price list lines. This permanently removes the line information from the associated price list or modifier list.

Note: Only the lines of a pricing entity can be archived. Price list and modifier list header information is copied to archive tables but is never deleted from the pricing application tables.

The archiving process copies data from the application tables to archive tables for long-term data storage. Once the pricing data is copied to the archive tables, it is deleted from the application tables.

When the archived data is no longer required, you can use the Purge feature to purge (remove) the data from the archive tables.

By archiving and purging records, the number of pricing records that need to be queried or processed by the pricing engine is reduced, potentially resulting in improved performance.

The following scenarios show where archiving data can be useful:

- Easier to delete pricing records created in error: If pricing records are sometimes created in error; you can delete these records.
- Archive infrequently used pricing records: As pricing setup records accumulate, the performance of the query windows and pricing engine may decrease. If you archive historical pricing setups that are no longer active or infrequently used, the number of pricing records that the pricing engine queries or processes is reduced, potentially improving pricing engine performance.

Note: You can review the selected records to be archived before submitting the archive request. Once the data is archived, it cannot be retrieved back to the pricing application tables. If you archive in error, you will have to re-create the data for the original header. You can view the archived data using Pricing database views based on archive tables. A user interface is not available to view records of archived data.

- Archive to retain historical pricing records: For various legal or statutory reasons, your business requirements may require you to keep pricing records for up to 10 years. If you are currently using the Inactive box for each price list and modifier to identify expired lists, you may want to use the archive feature instead. If you do not archive your data, as the number of pricing records (both active and inactive) increase in the database, performance could decrease for accessing pricing setups.

Note: You can archive and purge from the pricing source system (QP) and available source systems. The archiving and purging windows are available through the Oracle Pricing Manager responsibility. However, if pricing Security is ON, you need to be assigned Maintain Privileges to the pricing entities before you can archive and purge them.

- **Purge archived records:** Archived pricing data can be purged from the archive tables. The data must be archived first before it can be purged. See *Purging* , page 6-6.

Archiving Considerations

Once the pricing data is archived, it cannot be restored or retrieved to the pricing application tables. Therefore, before archiving data, it is important to consider the following archiving guidelines:

- Price list headers and modifier list headers will not be deleted from pricing applications tables. However, a copy of price list headers and modifier list headers will be maintained in archive tables for each archive request.
- In cases where the archiving encountered problems or could not be completed, a message is logged in the concurrent program log with information about the problem.
- If the All Lines box in the Archive Pricing Entities window is selected, then you cannot select specific product information and all the lines in the list will be archived.

You can use the Archive Pricing Entities window to define your archiving criteria such as specifying which price list lines you want to archive. You can specify a range of product attribute values for Item Number and Item Category.

After you have made your selections, click View Selected Records to view the records to be archived. You can either proceed with the archiving or cancel the request.

Archiving Entities Reviewed

The following table list the various pricing entities and special archiving instructions. Not all pricing entities can be archived and you should consult the following table for special instructions:

Pricing entity to be archived	Archiving Notes
Agreement	You cannot view the data before archiving.
Excluded items	Modifier has no effect on excluded items so if modifier line is archived, there is no impact.
Line accumulations	For modifiers, accumulated values are stored in the calling application, not in the modifier setup. User discretion is required when archiving setup of modifier line containing range breaks.
Modifier lines	When archiving modifier lines, if you leave the Product Context blank in the archive criteria, all the lines for the selected modifier that do not have product defined will be archived (if the line has been end-dated and falls within the Start/End Date Active range of the request).
Validations	Any conditions that cannot be handled are logged in concurrent program log.
Coupons and related lines	A coupon line and the attached benefit line will not be archived. If the archive criteria selected either of the coupon and benefit lines, both lines will not be archived. To archive, you need to delete coupon line then delete benefit line.
Price breaks	Can be archived (set up is maintained in archive table).
Price list lines (if the line has been used in a formula: Formula Type=Price List Line)	These lines cannot be archived; causes data integrity issues.
Modifiers with limits	Modifiers with limits at the header level cannot be archived. Modifier lines with limits attached to them will not be archived. If the archive criteria selects multiple lines and a few lines with limits are attached, only the lines without limits will be archived. For lines having limits, a message will be logged in the concurrent program log to indicate that the line was not archived because of limits.
Accrual redemption	No Impact
Responsibility	Archiving and purging is available through the Oracle Pricing Manager responsibility.

Note: Pricing entity security cannot be assigned to the archive and purge features. However, if Pricing Security is on, you must have Maintain access to an entity to archive or purge it.

To archive pricing entities:

1. Navigate to the Archive Pricing Entities window.

Archive Pricing Entities window

Archive Name: Archive Entity_0718

Entity Type: Deal

Entity: RL Deal Forms 1

Version: 1

Source System: QP

Lines To Archive

☐ All Lines

Product Context: Item

Product Attribute: Item Number

Product Attribute Value From: AS5000

Product Attribute Value to: AS5800

Start Date Active:

End Date Active: 16-APR-2004

Created By: 4RBROOKS

Creation Date:

Request ID:

View Selected Records

Submit

2. Enter an Archive Name that uniquely identifies the entity to be archived.
3. Select the Entity Type to be archived:
 - Agreement Price List
 - Freight and Special Charge List
 - Discount List
 - Standard Price List
 - Promotion
 - Surcharge List
4. Select the Source System such as Pricing associated with the entity type to be archived.
5. Select the Entity to be archived such as the price list or modifier list name.

Note: Modifier lists with header limits are restricted from being archived when the archive request is submitted. In addition, the following pricing entities will not archive nor will they display if you click View Selected Records before submitting the archive:

- Lines with limits
- Coupon/ benefit lines
- Formula lines

In the Lines To Archive region, select one of the following:

- To archive all lines for the selected Entity, you must first clear the "Active" box on the list header. Once the list is inactive, you can select All Lines. If All Lines is selected, then the remaining fields in the Line To Archive region are grayed out, since all of the lines will be archived.
- To select specific archiving criteria, complete the remaining steps:

Note: If you do not select product criteria in the Lines To Archive region, then all the end-dated lines falling within the date range, that do not have product specified in the price list or modifier list will be archived.

6. The Product Context of Item automatically defaults; however, you can clear the field if you do not want to enter any product information.
7. Select a Product Attribute.
8. Select the Product Attribute Value From/To to specify a range of product attribute values for Item Number and Item Category. For all other product attributes, ranges cannot be specified. The exact product attribute value must be chosen.
9. Select the Start Date/End Date Active date range to include modifier or price list lines that are active only within this date range. If you enter a Start Date Active and End Date Active, only lines equal to or less than the Start Date Active and End Date Active will be archived. This is useful, for example, to archive lines for a specific date range, for example, from June to September.
10. If No Start Date Active is entered, the range is from infinity to the End Date Active.

Note: You must enter a date in the End Date Active field (unless the "All Lines" box is selected).
11. Select Created By to archive records created by a particular system user.
12. Select Creation Date to archive records that were created on a particular system date.
13. After selecting the archive criteria, click View Selected Records to display the Price list or Modifier list window in query mode and review the records that meet the selected archive criteria.
14. Click Submit to archive the records. The archive will be saved using the name specified in Archive Name.

Related Topics

Overview of Archiving and Purging Pricing Entities, page 6-1

Purging Pricing Entities, page 6-6

Purging Pricing Entities

Purging pricing entities enables you to permanently delete archived pricing data. The data is archived first to prevent the accidental purging of important data from the pricing tables.

Once the data is purged it cannot be retrieved, so it is important to ensure that the data to be purged is not required for legal or statutory retention.

To purge pricing entities:

1. Navigate to the QP Purge Entity window.

QP Purge Entity window

The screenshot shows a window titled "QP_PURGE_ENTITY". Inside, there is a section labeled "Lines To Purge" which contains several input fields: "Source System" (with "QP" entered), "Archive Name" (with "Fall Archive" and a dropdown arrow), "Entity Type", "Entity", "Start Date Archive", and "End Date Archive". Below these fields is a "Request ID" field and a "Submit" button.

2. Select the Source System associated with the pricing data to be purged.
3. Select one of the following combination methods to purge the archives. Complete the fields for the selected combination:
 - Archive Name /Entity Type/Entity: A named archive will be purged.
 - Entity Type/Entity: All archives of a selected entity type and entity name will be purged.
 - Archive Start/End Date: Removes all archives falling within the specified range of system archive dates. You also purge all the archives of a specified system archive date using just the End Date Archive.
4. Click Submit to purge the data.

Related Topics

Overview of Archiving and Purging Pricing Entities, page 6-1

Archiving Pricing Entities, page 6-2

Multi-Currency Conversion Lists

This chapter covers the following topics:

- Overview of Multi-Currency Conversion Lists
- Creating a Multi-Currency Conversion List
- Considerations for Modifiers Using Multi-Currency Conversion List as a Qualifier
- Using Promotional Good type of Modifier Line
- Updating the Multi-Currency Conversion List

Overview of Multi-Currency Conversion Lists

If you have global customers or do pricing in different currencies, the multi-currency feature enables you to maintain a single price list for multiple currencies.

You can set up and maintain multiple currency conversion rates for a base currency in a single list which can be attached to multiple price lists or agreements. Price list maintenance is reduced because only one currency conversion definition can be attached to multiple base currency price lists. If prices change, you only need to update the base price list.

Note: You must have Maintain privileges to make any updates. If you are unable to access or update the multi-currency or related windows, you may not have the appropriate access privileges. Consult your Pricing Administrator.

You can also specify currency-specific markup/markdown equations that are applied as a formula, percent, or fixed amount to mark up the currencies.

When a pricing request is made, the pricing engine converts the price on the base price list to the ordering currency and returns the new price in the ordering currency (including any markup values).

Note: To set up the multi-currency feature, the following steps must have been completed (usually by your System Administrator or designate):

- The profile option QP: Multi-Currency Installed must be set to Yes, and the concurrent program *Update Price Lists with Multi-Currency Conversion Criteria* must be run.
- The concurrent program should only be run once. For more information, see: *Update Price Lists with Multi-Currency Conversion Criteria*, page 10-14.

- Advanced Pricing must be installed and licensed.

Rounding and markup factors

You can define markup criteria for each currency definition by specifying either a fixed value or one derived from a formula. Specific currency rounding can also be defined for the converted selling price.

Any changes to the base currency must be made in the Multi-Currency Conversion window and not the price list window.

The Base Round To value cannot be updated if the Profile QP: Price Rounding is set to Enforce Currency Precision.

Rounding Behavior during Currency Conversion Calculation

The following examples show you how rounding is calculated during currency conversion calculations.

If the Conversion Rounding Factor and the Round To values in the Multi-Currency Lists window are entered for a currency conversion, the conversion rounding factor will be applied first, followed by the Round To factor.

This is applicable for every item (except for the service item) in every pricing event.

Example 1

Price List Setup

- List Price for Item A = 60.12345
- Base Currency Code = USD

Multi-Currency Conversion List attached to the Price List

- To Currency Code = CAD
- Conversion Type = FIXED
- Conversion Rate = 2.0
- Conversion Rounding Factor = -2
- Round To = -3

Example 2

In Service Pricing, the service item is rounded using the Round To, not the conversion rounding factor.

Price List Setup

- Base Currency = USD
- List Price for Item B = 60.12345

Multi-Currency Conversion List attached to the Price List

- To Currency Code = CAD
- Conversion Type = FIXED
- Conversion Rate = 2.0
- Conversion Rounding Factor = -2
- Round To = -3

Sales Order Setup for a service item B

- Order Currency = CAD
- Converted Price before rounding = $60.12345 \times 2 = 120.24690$
- Price after applying the Round To (final rounded price) = 120.247
- Price displayed on the Sales Order = 120.2470 (after applying -4 currency precision for CAD)

Example 3

QP: Selling Price Rounding Options = Individual

The profile QP: Selling Price Rounding Options only affects the rounding factor. If the profile is set to *Individual*, then the rounding factor is applied. If it is set to *No*, the rounding factor is not applied. The profile *QP: Round Unit Selling Price* does not affect the Conversion Rounding Factor. The Conversion Rounding Factor is always applied to the list price.

Price List Setup

- Base Currency = USD
- List Price for Item A = 60.12345

Multi-Currency Conversion List attached to the Price List

- To Currency Code = CAD
- Conversion Type = FIXED
- Conversion Rate = 2.0
- Conversion Rounding Factor = -3
- Round To = -2

Sales Order Setup for a non-service item A

- Order Currency = CAD
- Converted Price before rounding = $60.12345 \times 2 = 120.24690$
- Price after applying conversion rounding = 120.247
- Price after applying the Round To (final rounded price) = 120.25
- Price displayed on the Sales Order = 120.2500 (after applying -4 currency precision for CAD)

Sales Order Setup for a non-service item A

- Order Currency = CAD
- Converted Price before rounding = $60.12345 \times 2 = 120.24690$

Example 4

QP: Selling Price Rounding Options = N (No)

Price List Setup

- Base Currency = USD
- List Price for Item A = 60.12345

Multi-Currency Conversion List attached to the Price List

- To Currency Code = CAD
- Conversion Type = FIXED

- Conversion Rate = 2.0
- Conversion Rounding Factor = -3
- Round To = -2

Sales Order Setup for a non-service item A

- Order Currency = CAD
- Converted Price before rounding = $60.12345 \times 2 = 120.24690$
- Price after applying Conversion Rounding Factor = 120.247
- Price displayed on the Sales Order = 120.2470 (after applying -4 currency precision for CAD)

Using a formula with component type as Price List Lines

1. Navigate to the Advanced Pricing - Define Modifier window.
2. Query or create desired modifier for a discount.
3. Select a Formula. If selecting a formula with a component type as Price List Line, the base currency of the price list must be the same as the modifier currency.
4. Save the modifier record.

Summary of Multi-Currency Changes to Price Lists and Agreements

When the price lists and agreements are converted to multi-currency usage, windows and fields are updated with new multi-currency fields and some existing procedures may change.

The following section summarizes the changes that occur when the multi-currency feature is implemented:

Pricing Engine Changes

The pricing engine matches the order currency to the currencies attached to the price list at the time of selection. It then applies the conversion type, markup and rounding to the price.

Changes to Price Lists window

- New Multi-Currency Conversion field: A new field called Multi-Currency Conversion is added to the Advanced Pricing - Price Lists window where you can select a multi-currency list which has the same base currency as the selected price list.
- Round To procedure: The Round To field in the price list header is grayed out and can no longer be changed directly in the Advanced Pricing - Price Lists window. Instead the Round To value must be changed in the Multi-Currency Conversion window and will update the Round To in the price list header.

Agreements

- New Multi-Currency Conversion field: A new field called Multi-Currency Conversion is added to the Pricing tab in the Agreements window where you can select a multi-currency list which has the same base currency as the selected price list.
- Round To procedure changed: The Round To field in the Pricing Tab is grayed out and can no longer be changed directly. Instead the Round To value must be changed in the Multi-Currency Conversion window and will update the Round

To in the Pricing tab. The multi-currency list can be updated only for Agreement Price Lists, not for Standard Price Lists.

Warning: Once the concurrent program has been run successfully, all existing price list and agreement windows are converted to multi-currency price lists. Users should not return to NON multi-currency price lists. Changing the profile back to No may cause undesired results if conversion criteria have been used. Oracle does not support changing the setting back to No.

Note: You cannot use the general ledger types as a conversion type if multi-currency is installed or if Oracle General Ledger is not installed.

Creating a Multi-Currency Conversion List

A Multi-Currency Conversion List stores a list of currencies and conversion criteria which enables transactions to be converted from a base currency to other currencies. The conversion list is attached to a price list or agreement which uses the conversion criteria to convert the base list prices to the foreign currency amount. Multiple conversion methods can be in effect at a time for a currency. For example, if converting USD (US dollars) to FRF (French francs), you could have a fixed conversion type for March and a formula conversion type for April. If more than one multi-currency conversion list is set up for the same base currency, then each conversion list must be assigned a unique name.

Using Conversion Types

Conversion types determine how the conversion rate is calculated. Some of these seeded conversion types are only available if Oracle General Ledger is installed; however, you can still link to other non-Oracle stored conversion rate information by using the formula functionality. The following seeded conversion types are available:

- **Fixed:** Enter a fixed value that is used as the conversion rate. For example, if you enter a value of 1.5, the list prices from the base price list is multiplied by 1.5 to get the converted amount.
- **Formula:** Attach a pricing formula and the value returned from the formula is the conversion rate. A formula with a component type of PLL (Price List Line) cannot be used as a conversion formula because the line may have a different base currency than the price list to which this currency conversion criteria is attached.
- **Transaction:** The conversion rate is entered by users of the calling applications (such as Oracle Order Management). In these cases, the rate entered is converted from transaction currency (for example, from the price list currency) to functional currency (such as the sales order). For other conversion types such as "Fixed," the rates entered in the multi-currency window is from base currency to transaction currency.

The following conversion types are available only if Oracle Financials (General Ledger) is installed:

- **General Ledger sourced (Corporate, Spot, EMU Fixed, User Defined):** Gets the conversion rate between the Base Currency and Currency To from Oracle General Ledger. These conversion types are available only if Oracle Financials (General Ledger) is installed.

To create a multi-currency list:

1. Navigate to the Multi-Currency Conversion List window.

Multi-Currency Conversion window

To Currency Code	Start Date	End Date	Conversion Type	Fixed Value	Formula
EUR			FIXED	.72	

All the fields in the Multi-Currency Conversion List are applicable to the base currency.

2. Enter the Base Currency Code for the currency that the price list is set up in. For example, if the price list has a base currency of US dollars, enter the code for US dollars such as USD.
3. Enter a Name to identify the multi-currency list and a Description.
4. Enter a numeric Base Round To value that rounds the selling prices to the decimal place that is entered. For example, if you entered a Base Round To value of -2, a price calculated as \$9874.343 would be rounded as \$9874.34.

Note: If the profile *QP: Price Rounding* is set to enforce currency precision, then the Base Round To value cannot be updated in the Multi-Currency Conversion List. To make a change you must first change the profile setting to Enforce Rounding Factor or NULL. Then change the Base Round To. Then change the profile setting back if desired.

5. Optionally, select Percent (%) or Amount as the Base Markup Operator which can be applied against the base currency. This Operator determines how the Base Markup Value is applied.
6. Enter a numeric Base Markup Value. This value is applied as either a percent or amount depending on the value defined in the Base Markup Operator field.

7. Enter a Base Markup Formula. The value returned by this formula is applied as a markup to the base currency. When entered, the Base Markup Value can be used within the Base Markup Formula. [Component type as modifier value (MV).]
8. In the Conversion Criteria Detail region, specify the criteria in the following fields to convert the base currency to the currency selected in the Currency To field:

Field	Meaning
To Currency Code	Enter the currency code for a currency that a price list can be converted to using the conversion criteria setup. For example, to convert a base currency in US dollars to Canadian currency (CAD), you enter CAD as the Currency To.
Start Date	Start of the currency conversion.
End Date	End Date of the currency conversion.
Conversion Type	Select one of the following conversion types: <ul style="list-style-type: none"> • Fixed: Enter a fixed number that is used as a fixed conversion rate. • Formula: For this type, the value returned by the formula becomes the conversion rate. • Transaction: Uses the Conversion rate or Conversion type from the Order Management Sales Order. The following conversion types are available only if Oracle Ledger is installed: Corporate, Spot, EMU Fixed, User Defined.
Fixed Value	Enter a numeric conversion value if Fixed was selected as the Conversion Type.
Formula	Select a pricing formula name if you selected Formula as the Conversion Type. The value returned by the Formula is the conversion rate. A formula with a component type as PLL (price list line) is not allowed in a conversion formula because the PLL line may have a different base currency than the price list to which this currency conversion criteria is attached. A formula with a component type as MV (modifier value) is also not allowed.
Conversion Date Type	Select a Conversion Date Type if the Conversion Type is not Fixed, Formula or Transaction. There are two conversion date types: <ul style="list-style-type: none"> • Pricing Effectivity Date: Uses pricing effectivity date passed by the sales order • Fixed: Uses Conversion Date setup for this currency.

Field	Meaning
Conversion Date	Enter a date if the Conversion Date type is Fixed. This date is used to retrieve the daily conversion rate from GL (Oracle General Ledger).
Attribute Type	Product Attributes, Pricing Attributes, and Qualifier Attributes are valid values for this field. This specifies the type of attribute to be set up for a currency conversion. This is an optional field.
Attribute Context	This is a mandatory field if you entered an Attribute Type. Enter the Attribute Context for the selected Attribute Type. For example, if the Attribute Type is Product Attribute, then its context can be ITEM.
Attribute Code	This field depends on the value entered for Attribute Context. For example, if Attribute Context is ITEM, this field contains its attributes like Item Number. This is a mandatory field when the Attribute Context is entered.
Attribute Value	This field gives the values of the Attribute Code entered. For example, if the Attribute Code is Item Number, this field displays all the items. This is a mandatory field when the Attribute Code is entered.
Attribute Meaning	This field displays the description of the Attribute Value. This is a display-only field.
Precedence	<p>Enter a numeric Precedence value if more than one conversion has the same Currency-To, Start Date, and End Date but different attribute values. See the Precedence example following the table.</p> <p>The pricing engine uses the precedence value to determine selection priority. If more than one attribute passed from OM Sales Order matches with the attribute setup for currency conversions, then the one with the lowest precedence value is selected by the pricing engine for conversion.</p>
Markup Operator	Select either Percent (%) or Amount. This operator is applied to either Markup Value or Markup Formula whichever is entered.
Markup Value	This is a numeric constant value that can also be used in the Markup Formula.

Field	Meaning
Markup Formula	<p>Select a formula A formula with Component Type PLL (Price List Line) cannot be used as a conversion formula because the PLL line may have a different base currency than the price list to which this currency conversion criteria is attached.</p> <p>Note: Both a Markup Value and Markup Formula can be entered, provided the Markup Value is used within the Markup Formula. In this case, the final value is the value returned after computing the Markup Formula.</p>
Conversion Rounding Factor	Enter a numeric Conversion Rounding factor that rounds the list price after the conversion and markup is applied. This rounding factor could be different for the same Currency To.
Round To	<p>Enter a numeric Round To value that rounds the selling price after the modifiers are applied. This value will always be the same for a Currency To.</p> <p>Note: If values for both Conversion Rounding Factor and a Round To are entered for a currency conversion, the Conversion Rounding Factor is applied first followed by the Rounding Factor. This will be applicable for every item (except for the service item) in every pricing event.</p>

Precedence example

When two conversion types with different attribute codes are passed from an Order Management sales order, for example:

Country = India

Item Cat. = CD Pack

then the pricing engine selects the attribute with the highest precedence. The lower the value the higher its precedence so 1 is selected before 2 and so on. In this case, the attribute Country = India is selected by the pricing engine because its precedence value (1) is greater than the precedence value of Item Cat. = CD Pack which is 2.

To Currency Code	Conversion Type	Attribute Code	Attribute Value	Start Date	End Date	Precedence
FRF	Fixed	Country	USA	3/1/01	3/31/01	4
FRF	Fixed	Country	India	3/1/01	3/31/01	1
FRF	Fixed	Item Cat	CD Pack	3/1/01	3/31/01	2
FRF	Fixed	—	—	3/1/01	3/31/01	3

Attaching the Multi-Currency Conversion List to a Price List or Pricing Agreement:

Once you have created a multi-currency conversion list in the Multi-Currency Conversion window you can attach it to a price list or agreement. You can select the Multi-Currency Conversion List from the Currency Conversion Criteria field in the price list or agreement.

Note: When multi-currency is first set up, a default multi-currency list without conversion criteria is automatically generated by the system and attached to price lists and agreements. You can replace the default list by selecting an alternate Multi-Currency Conversion list.

To attach the multi-currency conversion list to a price list

1. Navigate to the Advanced Pricing - Price Lists window.

Advanced Pricing - Price Lists: Multi-Currency enabled

The screenshot shows the 'Advanced Pricing - Price Lists' window. The 'Price List' tab is active. The 'Name' field is 'New Price List', 'Description' is 'New price list with mobile download.', 'Currency' is 'USD', 'Multi-Currency Conversion' is 'pd-conversion', and 'Round To' is '-2'. The 'Effective Dates' field shows '09-MAY-2002'. The 'List Lines' tab is selected, showing a table with columns: Product Context, Product Attribute, Product Value, Product Description, and a unit 'U'. The first row has 'Item' in Product Context, 'Item Category' in Product Attribute, and '208.05' in Product Value. At the bottom, there are buttons for 'Price Breaks' and 'Pricing Attributes'.

Product Context	Product Attribute	Product Value	Product Description	U
Item	Item Category	208.05		

2. Select the multi-currency list from the Multi-Currency Conversion field.

The field displays all currency conversion lists where conversion criteria *base currency* = currency of the price list.

When multi-currency is enabled, the Round To field in the price list is grayed out and can only be updated in the Multi-Currency Conversion window.

3. Save your work.

To attach the multi-currency conversion list to an agreement

1. Navigate to the Pricing Agreements window.

Pricing Agreements window

The screenshot shows the 'Pricing Agreements' window with the 'Agreement' tab selected. The 'Price List Type' is set to 'Agreement Price List' and the 'Price List' is '1006-COMPUTER-AGR'. The 'Currency' is 'USD', 'Multi-Currency Conversion' is 'Corporate', and 'Round To' is '-1'. There are empty fields for 'Description', 'Freight carrier', 'Freight Terms', and 'Comments'. Below these is a table with 5 columns: 'Customer Item', 'Address', 'Address Category', 'Product Value', and 'Product Description'. The table is currently empty. At the bottom right, there are two buttons: 'Price Breaks' and 'Pricing Attributes'.

2. Enter Agreement Type: Standard or Agreement.

- For Standard Agreements, you must select a Price List. The base currency, rounding factor, and Multi-Currency Conversion attached to that price list will default to the window.
- For Agreement price lists, in the Pricing tab, select a Multi-Currency Conversion.

For Agreement price lists, you can select lists where the base currency of the multi-currency conversion list is the same as the base currency of the agreement. When multi-currency is enabled, the Rounding Factor field in the agreement is grayed out and can only be updated in the attached Multi-Currency Conversion.

3. Save your work.

Considerations for Modifiers Using Multi-Currency Conversion List as a Qualifier

A modifier has a single currency. You need to create currency-specific modifiers.

Modifiers can be created in different currencies. The modifier will be selected and applied when the modifier currency is the same as price list's Base or To Currency.

To attach a multi-currency price list as a qualifier for a modifier:

1. Navigate to the Advanced Pricing - Define Modifier window.
2. Do a search or create a modifier and its respective currency; for example, a modifier in CAN (Canadian dollars).

3. Click List or Line Qualifiers button to display the qualifiers window.
4. Enter Modifier List in the Qualifier Context field.
5. Enter Price List in the Qualifier Attribute field.
6. Select a Price List that has Base Currency or To Currency defined with the same currency as in the modifier header.
7. Save your work.

Using Promotional Good type of Modifier Line

For a Promotional Good (PRG) type of modifier line, in the Get Product list for the list line, you must select the price list whose currency is the same as the modifier currency.

If you create a promotion with a Get Item, you must ensure that the base currency for the modifier (promotion) price list is the same as the base currency for the Get Item price list (Header). Otherwise, the pricing engine will not select or apply the Get Item.

1. Navigate to the Advanced Pricing - Define Modifier window.
2. Query or create desired modifier for the promotional good that uses the foreign currency; for example, French Francs.
3. In the Modifier Summary window, select a line with the Modifier Type of Promotional Goods.
4. Click Define Details to display the Define Modifier Details window.
5. In the Get region where you specify the Get Item details, select the required information about the Get Item.
6. In the Get Price field, select a price list from the Benefit Price field where the Base Currency = FRF has been defined.
7. Save the modifier record

Updating the Multi-Currency Conversion List

If you want to change or update conversion criteria such as increasing the conversion fixed rate from 2.2 to 2.3, you can make your changes in the Multi-Currency Conversion window. You can update information at both the header and line levels.

- *Header Level changes:* Be cautious when updating header level information such as Markup because you will lose historical information.
- *Line Level changes:* Be cautious when updating line level information in the Conversion Criteria Detail region to avoid loss of historical information. To prevent unexpected conversion behavior and loss of historical data, enter an End Date for the detail line and enter a new line with the desired changes including a new Start Date before updating any setup information.

To update the multi-currency conversion list:

1. Navigate to the Multi-Currency Conversion window.

2. Complete the required changes in the Multi-Currency Conversion List or the Conversion Criteria Detail regions (header and line levels) using the suggested best practice.

If you are changing Conversion Criteria Details, and you want to prevent unexpected conversion behavior and loss of historical data enter an End Date for the detail line, and enter a new line with the desired changes and a new Start Date.

3. Save your changes.

All saved changes to a multi-currency conversion list are immediately available to all price lists and pricing agreements to which the list is attached.

Agreements

This chapter covers the following topics:

- Overview of Creating Agreements
- Creating Agreements
- Revising an Existing Agreement
- Finding Agreements
- Deleting Agreements

Overview of Creating Agreements

Oracle Advanced Pricing enables you to establish agreements with your customers that define the prices, payment terms, and freight terms that you negotiate. You can:

- Define your agreements using customer part numbers and inventory item numbers.
- Make revisions to the original terms and maintain these changes and their reasons under separate revision numbers.
- Attach an already existing price list to the agreement or define new prices.
- Assign optional price breaks by quantity. Price lists are exclusive by agreement.
- Set effectivity dates for agreement terms.
- Set payment terms including invoice rule and accounting rule.
- Set freight terms including the freight carrier.
- Apply agreement terms to sales orders by reference agreements.
 - If you are using the multi-currency feature with agreements, see: *Attaching the Multi-Currency Conversion List to a Price List or Pricing Agreement*, page 7-10.
 - You can only view or update a price list on an agreement in your pricing transaction entity. The profile QP: Pricing Transaction Entity must match the pricing transaction entity of the price list attached to the agreement.
 - You can only view or update a price list on an agreement in your source system. The profile QP: Source System Code must match the source system of the price list attached to the agreement. Otherwise, the price list on the agreement is view-only.

Types of Agreements

There are two types of agreement:

- **Standard Price List:** Used, for example, to have one price list for all customers but to default special terms onto a sales order for a specific customer.
- **Agreement Price List:** Used to offer a negotiated price for an item to a customer.

The following table compares the two agreement management methods:

Standard Price Lists	Agreement Price Lists
Agreement lines not allowed.	Agreement lines required.
Associated with standard price list (type PRL).	Associated with agreement price list (type AGR).
Maintain and view price list lines through Price List window.	Maintain and view price list lines through Agreement window.
Use each standard price list with multiple standard agreements and to price orders associated or not associated with an agreement.	Use each agreement price list with multiple pricing agreements. Not usable to price orders not associated with an agreement.
Cannot revise price list lines using agreement window.	Can revise price list lines using agreement window.
Agreement number not automatically created as a qualifier for the associated price list.	Agreement number automatically created as a qualifier for the associated price list. You can specify the pricing agreement on an order.

Customer Merge

When you merge customers in Oracle Receivables, you can merge:

- The information from one customer (the From customer) with the information from another customer (the To customer).
- The information from one or more customer sites of that customer (the From sites) with the site information from the other customer (the To sites).

If the From customer is party to agreements, the Oracle Receivables merge process executes an Oracle Advanced Pricing process to update the following agreements information:

- If you merge customer: The process changes the customer name on the agreement from the From customer to the To customer. Verify this change in the Pricing Agreements window, Agreement tab, Customer, and Cust Number fields.
- If you merge sites: The process changes the invoice address from the From customer site to the To customer site. Verify this change in the Pricing Agreements window, Payment tabbed region, Invoice To and Address fields.

Note: Pricing Security privileges affect Pricing Agreements by inheriting the security rules associated with any Price Lists. You can select a price list to associate with an agreement at setup if your privileges authorize view access to the price list. You cannot change the price list or change its relationship to an agreement if you do not have Maintain access to the price list. If you have access issues, consult your Pricing Administrator.

Creating Agreements

Use this process to create pricing agreements.

Note: The Agreement field does not display by default on the Oracle Order Management order header. You must use the Folder icon to display it.

Security Privileges and Agreements

Pricing Security privileges affect pricing agreements by inheriting the security rules associated with any Price Lists. You can select a price list to associate with an agreement at setup if your privileges authorize view access to the price list. You cannot change the price list or change its relationship to an agreement if you do not have Maintain access to the price list.

If you have access issues, consult your Pricing Administrator.

To create a pricing agreement:

1. Navigate to the Pricing Agreements window.

Pricing Agreements window

The screenshot shows the 'Pricing Agreements' window with the 'Agreement' tab selected. The fields are populated as follows:

Field	Value
Agreement Name	Agreement
Revision Date	21-FEB-2003
Customer	Vision Corporation
Agreement Type	Standard Terms And Cond
Effective Dates	21-FEB-2003
Purchase Order	
Agreement Source	Pricing Agreement
Agreement Number, Revision	1
Revision Reason	No Revision for this Agree
Cust Number	1739
Contact	
Sales Person	
Signature Date	21-FEB-2003

Below the fields is a table with the following columns: Customer Item, Address, Address Category, Product Value, and Product Description. The table is currently empty.

At the bottom of the window are two buttons: 'Price Breaks' and 'Pricing Attributes'.

2. Enter an Agreement Name that identifies the agreement.
3. Enter an Agreement Number if it has been assigned to the agreement.
The Revision Number defaults to 1. However, this number may change as new revisions are created; for example, from 1 to 2. The Revision Date defaults to the current system date.
4. Enter a Customer name and Number.

5. Select an Agreement Type such as a Standard Terms And Conditions.
6. Select a Contact name.
7. Enter the Effective Date range for the agreement. If an end date is not entered, the agreement will be active for an indefinite period. However, if you are creating revisions, you will need to end the current agreement.
8. Enter a name for the Sales Person.
9. Enter the customer's Purchase Order number.
10. Enter a Signature Date for the purchase order.

The Agreement Source field (view-only) displays the source of an agreement.

In the Pricing tab

11. Select the Pricing tab.

Pricing Agreements window: Pricing tab

The screenshot shows the 'Pricing Agreements' window with the 'Pricing' tab selected. The window contains the following fields and values:

Price List Type	Standard Price List	Price List	Business World
Currency	USD	Rounding Factor	-2
Description	Price List for Business World		
Freight carrier		Freight Terms	
Comments			

12. Select the Price List Type:
 - Select Standard Price List to associate a standard agreement.
 - Select Agreement Price List to associate an existing agreement price list to an agreement.
13. Select a Price List:
 - For Standard Price Lists: Select Standard Price List. The Currency, Rounding Factor, Description, and Comments fields default from the Standard price list selected. These values cannot be changed in the Pricing Agreements window.
 - For Agreement Price Lists: You can create a new price list name or select an existing Pricing Agreement price list.

Agreement price lists are maintained only in the Pricing Agreements window. Agreement price lists can be adjusted or modified unlike Standard Price Lists.

Complete the following steps if creating an *Agreement Price List*:

If you choose an existing Agreement Price List, the Currency, Rounding Factor, Description, Freight Carrier, Freight Terms and Comments fields will default from the price list. However, if you change the values for any of these fields, the information will be changed for all Pricing Agreements using this price list.

14. Select a Currency.
15. Enter a Rounding Factor.
16. Enter a price list Description.

Complete the following steps for both *Standard* and *Agreement* price lists:

17. Enter a default Freight carrier.
18. Enter default Freight Terms.
19. Enter any Comments.

In the Payment tab

20. Select the Payment tab.

Pricing Agreements window

The screenshot shows the 'Pricing Agreements' window with the 'Payment' tab active. The 'Payment Terms' section includes fields for 'Payment Terms' (30 Net), 'Invoice To' (Business World), 'Address' (2391 L Street), 'San Jose, CA 95053', and 'Invoice Contact' (Smith-Kelly, Jolene). The 'Rules' section shows 'Accounting Rule' (IMMEDIATE) and 'Invoicing' (ARREARS INVOICE). An 'Override Flag' section has checkboxes for 'Accounting Rule' and 'Invoicing Rule', both of which are checked. Below these sections is a table with columns: Customer Item, Address, Address Category, Product Value, UOM, and Primary UOM. The table contains five rows of data. At the bottom right, there are buttons for 'Price Breaks' and 'Pricing Attributes'.

Customer Item	Address	Address Category	Product Value	UOM	Primary UOM
			OC_KIT92777	Ea	<input type="checkbox"/>
			OC_PT092777	Ea	<input type="checkbox"/>
			STD08-ITEM	Ea	<input type="checkbox"/>
			STD09-ITEM	Ea	<input type="checkbox"/>
			77KB1	Ea	<input type="checkbox"/>

21. Select the Payment Terms.
 - When you enter a sales order in Oracle Order Management and the agreement uses a Standard price list, the payment terms default from that price list. You can override the price list terms on the agreement.
 - When you enter a sales order in Oracle Order Management and the agreement uses an Agreement price list, the payment terms default from those that you enter in this field.
22. Enter the bill-to name in Invoice To.
23. Enter a bill-to Address.

24. Enter the bill-to contact in Invoice Contact.
25. In the Rules region, select a default Accounting Rule.
26. Select the Invoicing rule.
 - Accounting and invoicing rules are set up in Oracle Receivables.
 - In the Override Flag region, the override check boxes for the Accounting and Invoicing Rules are for information only.

To create agreement lines:

For Standard Price Lists: The agreement line details default from the Standard Price List entered in the Price List field in the Pricing tab. These fields cannot be changed or additional lines cannot be entered from the Agreement Lines. Changes and additional price list lines must be made on the Price List from the Price List Setup window.

For Agreement Price Lists: If you attached an existing Agreement Price List, the agreement lines default from that price list. You can make changes to the agreement line details, and add additional agreement lines. Any changes or additions that you make will be reflected on the other agreements that this price list is attached to.

In the lowest region of the window, enter Product Value. If there is a customer item associated, the customer item number will be defaulted to the Customer Item field. Customer Item is a pricing attribute.

- The defaulted values for customer item, address and address category should not be changed in this window. Changes to these should be made where the customer item relationship is maintained. Create the accounting and invoicing rules in Oracle Receivables.
 - When you have created a customer item relationship with an internal inventory item and you enter the inventory item product value, the customer item, address, and address category will be defaulted.
1. Enter a unit of measure (UOM).
 2. Select Primary UOM if this price list line unit of measure is the primary pricing unit of measure for the item. The pricing engine uses the primary pricing unit of measure and the Oracle Inventory unit of measure conversion information to price an order whose unit of measure does not have a price list line. For example, a price list has two price list lines for item A11111, one with unit of measure EA, the primary UOM, and one for boxes. When the pricing engine receives an order in unit of measure CS, it accesses the unit of measure conversion tables to convert CS to EA.
 3. Select Price List Line in Line Type.
 4. Select Unit Price for Application Method
 5. Enter a base price in Value.
 6. Enter the effectivity dates in Start Date and End Date. They should be within the effectivity dates of the agreement.
 7. Enter the Comments.
 8. Enter a Revision number.

Note: To create list of reasons, see: *Oracle Advanced Pricing Implementation Guide, Lookups*.

9. Enter a Revision Date.
10. Save your work.

Note: You cannot enter an item category in Product Value.

To define pricing attributes:

1. Click Pricing Attributes in the Pricing Agreements window to display the Pricing Attributes window.

The Product Context, Product Attribute and Product Value default from the Agreement Line that you are entering.

Pricing Attributes window

The screenshot shows the 'Pricing Attributes' window with a table containing the following data:

Product Context	Product Attribute	Product Value	Pricing Context	Pricing Attribute
Item	Item Number	AS54888		

2. Enter a Pricing Context.
3. Enter a Pricing Attribute.
4. Enter the Value From/To.
5. Save your work.

Note: The pricing attributes are joined as AND conditions since they apply to one price list line.

To define price breaks:

1. Enter an agreement line with price breaks:
 - Enter Price Break Header in Line Type.
 - Enter Point or Range in Price Break Type.
2. Click Price Breaks to display the Price Breaks window. The Price Breaks button is enabled only when you select the Price Break Header in Line Type on the agreement line.

Price Breaks window

The screenshot shows a window titled "Price Breaks" with a table containing pricing data. The table has five columns: "Pricing Context", "Pricing Attribute", "Value From", "Value To", and "Price". The first row is highlighted, showing "Volume" as the Pricing Context, "Item Quantity" as the Pricing Attribute, "100" as the Value From, "500" as the Value To, and "2" as the Price. There are several empty rows below the first one. The window also features a toolbar with icons for adding, deleting, and saving, and a checkbox in the top right corner.

Pricing Context	Pricing Attribute	Value From	Value To	Price
Volume	Item Quantity	100	500	2

In the Price Breaks window, the Pricing Context defaults to Volume; Pricing Attribute defaults to Item Quantity; and the Application Method defaults to Unit Price. The Pricing Context cannot be changed.

Complete the remaining steps for each price break that you define:

3. Enter the Value From/To.
4. Enter the list Price.
5. Save your work.

Related Topics

Defining Price Breaks for a Price List Line, page 5-14

Revising an Existing Agreement

If you need to make minor changes to an existing agreement such as changing the payment terms, you can simply change the agreement terms and save the changes. This simply updates the existing agreement with your new changes.

However, if significant changes are required and you want to keep a record of previous agreements, you can create a new revision. This does not overwrite the existing agreement but creates a new version of the original agreement. This is useful if you want to track and manage multiple versions of the same agreement.

You must determine when changes warrant a new agreement version, and then manually create a new revision and revision number. For tracking purposes, a logical revision numbering system will help you better manage your agreements such as numbering the revisions 2, 3, 4 and so on.

Once the new agreement revision is created, you can update the agreement header information.

Note: You must end the current revision before creating a new revision. An agreement can have multiple revisions but the effective dates cannot overlap. Only one revision can be effective for a given range of effective dates.

1. Find the original agreement you want to revise.

Pricing Agreements window

The screenshot shows the 'Pricing Agreements' window with tabs for Agreement, Pricing, and Payment. The Agreement tab is active, displaying the following fields:

Agreement Name	1732601	Agreement Number, Revision		1
Revision Date	27-MAR-2002	Revision Reason		
Customer	Computer Service and Rentals	Cust Number	1637	
Agreement Type	Standard Terms And Cond	Contact	Dowel, James	
Effective Dates	27-MAR-2002	Sales Person	Barry Lewis	
Purchase Order	1234567	Signature Date	27-MAR-2002 []	

A 'Create Revision' button is located at the bottom right of the form area.

Below the form is a table with the following columns: Customer Item, Address, Address Category, Product Value, and Product Description.

Customer Item	Address	Address Category	Product Value	Product Description
			AS54888	Sentinel Standard Desk
			MISC.MISC	
			ALL	
			AS80000	Final Chip Assembly
			AS54888	Sentinel Standard Desk

At the bottom of the window are two buttons: 'Price Breaks' and 'Pricing Attributes'.

Note: The original agreement must have an effective end date entered and saved before a new revision can be created. The end date can be past, current, or future; however the date ranges for any revisions cannot overlap. Only one revision can be in effect for a given range of effective dates.

2. Click Create Revision to display the Create Revision window.

Create Revision window

The screenshot shows the 'Create Revision' window with the following fields:

Agreement Name	1732601		
Revision Number	2	Revision Date	10-APR-2002
Effective Dates	10-APR-2002	-	10-APR-2003
Revision Reason	Revising the effective da...		

At the bottom of the window are two buttons: 'Cancel' and 'Create'.

The Agreement Name defaults from the original agreement. Although you cannot change the agreement name, you can change the revision number. The Revision Date defaults to the current date.

3. Enter the Revision Number to identify the version of the agreement you are creating. This is helpful in tracking and managing different revisions of the agreement.
4. Enter the effective start and end dates for the agreement. Date ranges cannot overlap, and only one revision can be in effect for a given range of effective dates.
5. Select a Revision Reason that describes why the agreement is being revised.
6. Click Create to display the new agreement in the Pricing Agreements window. The new revision number displays in the Revision field.

Note: Revisions to the agreement header do not revise the pricing lines for the agreement. A change to the price list lines affects all agreements that the price lines are attached to.

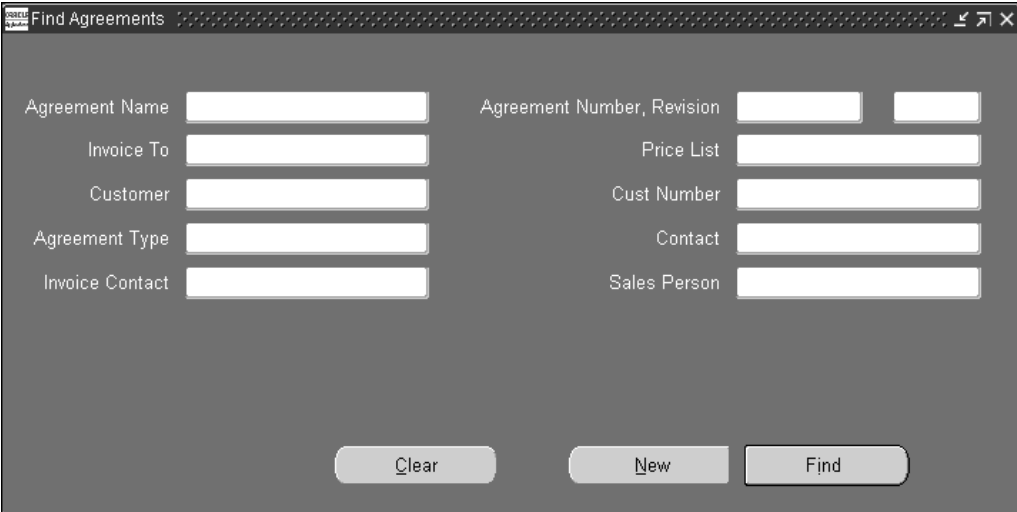
Finding Agreements

Use the Find Agreements windows to find agreements or agreement revisions by one or more of the following criteria: Agreement Name, Agreement Number/Revision, Invoice To, Price List, Customer, Cust Number, Agreement Type, Contact, Invoice Contact, or Sales Person.

To find agreements:

1. Navigate to the Find Agreements window.

Find Agreements window



The screenshot shows a window titled "Find Agreements" with a search interface. It contains two columns of text input fields. The left column includes fields for "Agreement Name", "Invoice To", "Customer", "Agreement Type", and "Invoice Contact". The right column includes fields for "Agreement Number, Revision" (split into two sub-fields), "Price List", "Cust Number", "Contact", and "Sales Person". At the bottom of the window, there are three buttons: "Clear", "New", and "Find".

2. Enter your search criteria.
3. When you have completed your entries, choose Find to display the search results.

Note: To create a new agreement, choose the New button.

Deleting Agreements

Pricing agreements can be deleted if they have not been used in any previous order transactions. Once sales order lines have been attached to an agreement, the agreement cannot be deleted. If you attempt to delete an agreement with sales order lines attached, a warning note notifies you that the agreement cannot be deleted.

To delete agreements:

1. Navigate to the Pricing Agreements window.
2. Find the Pricing Agreement to delete.
3. From the Edit menu, select Delete to delete the pricing agreement.

Pricing Engine Request Viewer

This chapter covers the following topics:

- Overview of the Pricing Engine Request Viewer
- Viewing Information in the Pricing Engine Request Viewer

Overview of the Pricing Engine Request Viewer

The Pricing Engine Request Viewer window captures the pricing call from any calling application such as Oracle Order Management and displays the inputs and outputs of the pricing call. This information can help you to diagnose which price list lines were selected or rejected by the pricing engine and to determine why certain prices and adjustments were or were not applied.

Only the latest pricing request is displayed; however, historical data is not maintained because the Pricing Engine Request Viewer window updates the display information each time the pricing engine captures a new transaction. Previous pricing requests are saved in the pricing tables.

The Pricing Engine Request Viewer window is available from the main Advanced Pricing menu (Pricing Manager responsibility) or in Oracle Order Management using the following navigation path: Sales Orders > Tools > Pricing Engine Request Viewer.

Features available in the Pricing Engine Request Viewer window

Using the Pricing Engine Request Viewer window, you can do the following:

- View the pricing, qualifiers, and product attributes passed to the pricing engine along with the other data generated by the engine.
- View which modifier lines the pricing engine applied or rejected for benefit adjustments along with the details of the modifier line. View price request line of the calling application.
- View the relationship between order lines for promotional modifiers, price breaks, and service lines:
- View the formula step values generated by the pricing engine used in formula calculation.
- View the controls passed by the calling application to the pricing engine such as event, Rounding, Search and Calculate Flag, and GSA.
- View and query fields in the Pricing Debug Log

You can view the debug log in the Pricing Engine Request Viewer window, and query the record within the debug log to display the lines directly. The results will be the 10 previous lines and the remaining lines of the debug file.

- Delete the request(s). Navigation is Edit > Delete.

Process for the Pricing Engine Request Viewer

The following process outlines the series of activities when a pricing call is made:

1. The calling application makes a call to build qualifiers and builds the contexts through sourcing.
2. The calling application then calls the pricing engine with the attributes generated by attribute mapping.
3. The pricing engine processes the request then searches for and evaluates eligible price list and modifier lines.
4. If the profile option QP Debug is set to Request Viewer On, then the pricing engine inserts records into the permanent pricing debug tables and generates a unique request ID, storing the information from the calling application.
5. The pricing request information can then be viewed by querying the request in the Pricing Engine Request Viewer from the Order Management Sales Order Pad or through the Pricing Manager responsibility menu.

Setting up the user profile options

- QP: Debug: Set the value of this profile option to Request Viewer On when you want the Request Viewer to capture pricing request details into the pricing debug tables and debug log information into the debug log table. The debug log text file is also created. The default value is Request Viewer Off.

The setting is active for the transactions for the user who set this profile option—other users' transactions are not affected.

Note: Setting the profile QP: Debug will slow the performance of the Pricing Engine Request Viewer. The concurrent request Purge Pricing Engine Requests purges the pricing engine requests, and it should be run on a regular basis to purge the historical data from the pricing debug tables. Periodically purging the historical data will improve the performance of the Pricing Engine Request Viewer window.

- QP: Set Request Name: The profile option QP: Set Request Name is used in conjunction with the QP: Debug profile option. Set QP: Set Request Name to Yes if you want the value in the Request Name field prefixed to the OrderID. For more information on setting up profile options, see: *Oracle Advanced Pricing Implementation Manual*, Profile Options.

Viewing Information in the Pricing Engine Request Viewer

The Pricing Engine Request Viewer window displays detailed information about the price list lines and modifier lines that the pricing engine applied or rejected.

Pricing Engine Request window

The screenshot shows the 'Pricing Engine Request' window with three main sections:

- Pricing Engine Requests:** A table with columns: Order No., Req Name, Req Id, Pricing Event, Created By, and Creation Date. It contains two rows for Order No. 54941, both with Req Name 'QP QA CERT I-63911'. The first row has Req Id 31885, Pricing Event 'LINE', Created By 'OVERATP', and Creation Date '15-APR-200'. The second row has Req Id 31886, Pricing Event 'ORDER', Created By 'OVERATP', and Creation Date '15-APR-200'.
- Pricing Engine Request Lines:** A table with columns: Line No., Status Code, Line Id, Status Text, Line Index, and Release. It contains two rows. The first row has Line No. 54941, Status Code 'Updated', Line Id 63911, Status Text 'GOOD_FOR_ALL', Line Index 63911, and Release 63911. The second row has Line No. 1, Status Code 'Updated', Line Id 72826, Status Text 'GOOD_FOR_ALL', Line Index 136737, and Release 136737.
- Pricing Engine Request Line Details:** A table with columns: Priced, Applied, Status Code, Status Text, Parent Line Detail Index, and Line Detail Index. It contains four rows, all with Status Code 'New record create:'. The Status Text values are 'QUALIFIER_ONLY', 'QUALIFIER_ONLY', 'GOOD_FOR_ALL', and 'GOOD_FOR_ALL'. The Parent Line Detail Index values are 34, 35, 36, and 37. The Line Detail Index values are 34, 35, 36, and 37.

At the bottom of the window are four buttons: 'View Debug Log', 'Attributes', 'Related Lines', and 'Step Values'.

The transaction details are displayed in one or more of the following regions in the Pricing Engine Request Viewer window:

Pricing Engine Requests region

This region displays information about the pricing requests with its associated controls sent by the calling application to help you locate the problem.

For Request Type ONT only, the order number associated with the request is displayed.

Note: Depending on the version of Oracle Advanced Pricing installed, the order and line numbers for orders created in prior releases may not display in the Pricing Engine Request Viewer window. However, order and line numbers created in subsequent releases can be viewed.

Pricing Engine Request Lines region

This region shows information about the lines being priced including line number, unit price and adjusted unit price. You can view information related to service and serviceable lines in this region.

Note: For lines of type LINE, the Line No. field displays the appropriate line number from the Order Entry page. For lines of type ORDER, the order number associated with that request displays. For requests of type PRICE, the line number for the request lines of type LINE does not display.

The Request Id + Line Index column maintains the master-detail relationship between the lines and line details. This block is used to change operand value, select/de-select modifiers, change manual modifiers and change buckets.

Pricing Engine Request Line Details region

This region displays information regarding processed price list lines and modifiers lines selected and/discarded (eliminated/rejected) by the engine. The Priced box indicates which lines were finally selected for pricing by the pricing engine. The Applied check box indicates which lines were considered in calculating the selling price.

This region also displays the information for item upgrades, coupon issue, term substitution, freight and special charges, and relationships between price breaks.

Pricing Debug window

Click View Debug Log to view the debug log in the Pricing Engine Request Viewer window. You can then query a record within the debug log to display the lines directly. The results display the ten previous lines and the remaining lines of the debug file.

Attributes window

Click the Attributes button to display all attributes for a selected line or line detail. The region displays information about the pricing attributes that the attribute mapping function passed to the pricing engine. The pricing engine uses these attributes to qualify a line or an order for price and adjustments:

- Click Attributes from the Request Lines region to display the attributes passed to the pricing engine.
- Click Attributes from the Request Line Details region to display the attributes related to the selected price list lines/modifier line.

Pricing Debug Related Lines window

Choose Related Lines from the Pricing Engine Request Viewer window to display the Pricing Debug Related Lines window. The cursor must be in the Engine Request Lines Details region. You can view the relationship between the Buy and Get items for Other Item Discounts and Promotional Goods.

Formula Step Values window

When your cursor is in the Pricing Engine Request Lines Detail region, click Step Values in the Pricing Engine Request Viewer window to display the Formula Step Values window.

Reports and Concurrent Programs

Overview of Reports and Concurrent Programs

Oracle Advanced Pricing provides reports and concurrent programs that enable you to administer, manage, and review your pricing operations and data to:

- Determine what pricing information has been established; for example, active price lists, formulas and qualifiers.
- Communicate pricing information internally and externally; for example publishing price lists to internal and external users.
- Take action based on order or pricing activity; for example, issuing a credit memo based on reported accruals.

Note: When Pricing Security is ON, security privileges determine which pricing entities can be viewed from the list of values. View or Maintain privileges determine the actions you can do in various windows.

Accrual Details report

The Accrual Details report enables you to run a report to view modifiers that have been set up for accruals or those with associated Coupon Issue information. Using this report, you can quickly see which coupons have been issued and the coupon numbers generated for a modifier.

Report Submission

In the Submit Request window, Name field, select Accrual Details.

Report Parameters

Accrual Details Report

The screenshot shows a 'Parameters' dialog box for the 'Accrual Details Report'. It contains several input fields: 'Modifier Name From' is set to '10% Discount', 'Modifier Name To' is set to 'RB-Surcharge1', 'Start Date Active' and 'End Date Active' are empty, 'Qualifier Context' is set to 'ORDER', and 'Blanket Id' is empty. Below these, 'Qualifier Attribute Value From' and 'Qualifier Attribute Value To' are also empty. At the bottom right, there are four buttons: 'OK', 'Cancel', 'Clear', and 'Help'.

- **Modifier Name From/To:** Select a range of modifier names to narrow the report to the names that fall between the specified range. For example, if you specified modifier names A to F, modifiers names G and H would not be included in the report.
- **Start/End Date Active:** Select the start and end date range of the modifiers to be included in the report.
- **Qualifier Context:** Select a Qualifier Context to narrow the report to only those modifiers with the selected Qualifier Context.
- **Qualifier Attribute Value From/To:** Select specific qualifier attribute to further define the selected qualifier context.

Attribute Mapping Rules Error report

This program provides status and error messages to advise you about the following:

- Invalid attribute mapping rules
- Warnings if the program completes with Attribute Mapping errors
 - Success: Program completes without Attribute Mapping errors.
 - Warning: Program completes with one or more Attribute Mapping errors.
 - Error: Program cannot complete due to some exception/runtime error.

The report displays an entry in the file log for every attribute mapping rule that is invalid. The entry includes details such as the context, attribute, pricing type, request type, attribute mapping rule, and the error message produced by the invalid mapping.

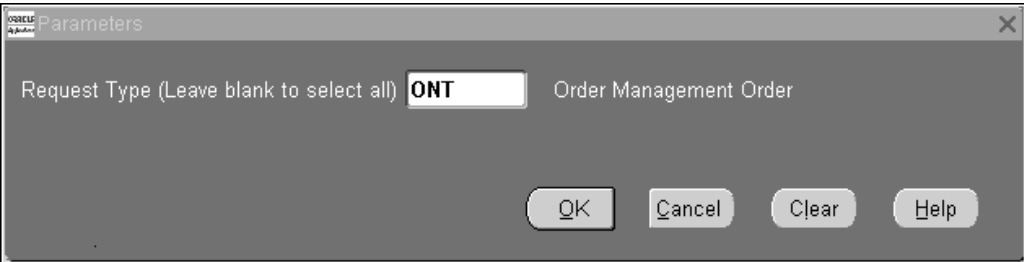
You can run the report for a single Request Type such as Order Management (ONT) or all request types. The number of errors displays on the log after the report is run.

Report Submission

In the Submit Request window, Name field, select Attribute Mapping Rules Error Report.

Report Parameters

Attribute Mapping Rules Error Report parameters



Request Type: Select a single Request Type or leave blank to run report for all request types.

Build Attribute Mapping Rules program

This program generates entries into the BUILD_CONTEXTS application program interface (API). You pre-generate entries into this API so that the pricing engine evaluates only the qualifier and pricing attributes used in the price lists, modifiers, and formulas that are relevant to each call rather than all of the attribute mapping rules.

Note: The Build Attribute Mapping Rules program will source the attributes that are used only in the active pricing setup if the profile value QP: Check For Active Flag is set to Yes. If the profile value QP: Check For Active Flag is set to No, this program sources the attributes that are used in both the active and inactive setup. The default value of the profile QP: Check For Active Flag is No and can be updated only at the site level.

Report Submission

Run this program after you:

- Make a change to the mapping rule for a specific qualifier attribute. For example, run this process after you map the Geography context to a qualifier attribute.
- First use a qualifier in either a modifier or a price list. For example, run this process after the first time that you use Customer Class as a qualifier for a price list or modifier.

In the Submit Request window, Name field, select Build Attribute Mapping Rules.

Run the process during a time when most users are not logged onto the system. You may encounter a record locking problem if this process runs at the same time that the pricing engine is processing calls.

Report Parameters

None

To recover if the process fails:

If the process fails:

- The QP_BUILD_SOURCING_PVT package becomes invalid.
- All subsequent pricing calls fail.

To recover, complete the following steps:

1. Check the concurrent program log to view any errors. If needed, log into SQL/PLUS and check the errors associated with compiling the QP_BUILD_SOURCING_PVT body. Problems may include:
 - You reference an API in an attribute mapping rule and the API is invalid or does not exist.
 - You have a typographical error in an attribute mapping rule that refers to an API or global structure.
2. Fix the attribute mapping rule in the Attribute Mapping window.
3. Rerun this concurrent process.

Build Formula Package program

Every time when a new formula expression is set up, the concurrent program Build Formula Package should be run to generate the formula package. Every time a new formula expression is created or updated, a Warning dialog box displays a message to run the concurrent program Build Formula Package.

This concurrent program builds the Formula Package containing statements which uses bind variables for evaluating the formula value. This generated package is called from the main engine formula package at run time to calculate the formula value.

Note: If the Formula expression already exists in the current generated formula package, the Warning box does not display.

Report Submission

In the Submit Request window, Name field, select Build Formula Package.

Report Parameters

None

Cross Order Volume Load

Run the program Cross Order Volume Load to populate the cross order volume tables. The qualifier and pricing attribute mapping functions determine the cross order volumes for a customers and customer-item combinations.

The Cross Order Volume Load considers orders and order lines in Booked status, but does not consider returned or cancelled order lines.

The cross order volume profile options determine the order lines included in the cross order volumes.

For example:

- Profile option QP: Cross Order Volume Period 1: 30
- Profile option QP: Cross Order Volume Period 2: 60
- Profile option QP: Cross Order Volume Period 3: 90
- Concurrent process Cross Order Volume Load, Effective Date: 31-December
- Cross order period 1: Order lines with request date between 1-December and 31-December

- Cross order period 2: Order lines with request date between 1-November and 31-December-2000
- Cross order period 3: Order lines with request date between 2-October and 31-December-2000

Report Submission

In the Submit Request window, Name field, select Cross Order Volume Load.

Report Parameters

Cross Order Volume Report parameters

- Operating Unit: Enter either a single operating unit or leave blank for all operating units.
- Effective Date: Provide the load effective date; otherwise the program uses the current date.

Cross Order Volume Report

Run the Cross Order Volume Report to view the information in the cross order volume tables. The report displays the total order amount, total item amounts and total item quantities for each customer and period.

The cross order volume loader only accumulates orders for items in the Cross Order Item Amount/Quantity Summary that have modifiers using the cross order volume attributes. Similarly the engine only gives total Cross Order summaries if a cross order qualifier has been used in a modifier.

Therefore, it is necessary to run the cross order volume concurrent request after you set up any modifiers using either (a) a cross order amount qualifier that has not been used previously or (b) a cross order item amount/quantity pricing attribute for an item that has not been used previously. This ensures that all item totals are accumulated and loaded into the cross order tables.

Report Submission

In the Submit Request window, Name field, select Cross Order Volume Report.

Report Parameters

None

Modifier Details report

This report displays modifier information.

Report Submission

In the Submit Request window, Name field, select Modifier Details.

Report Parameters

Modifier Details Report parameters

The screenshot shows a 'Parameters' dialog box with the following fields and values:

Field	Value
Modifier Number From	11111
Modifier Number To	SC 5 VC9000NA
Modifier Name From	10% Discount
Modifier Name To	10% Discount
Modifier Version From	1
Modifier Version To	x
Start Date Active	
End Date Active	
Active Modifier Only	Yes
Active Modifier Lines Only	Yes
Item Name	CM99105
Item Category	060--18
Customer Name	Vision Corporation
Customer Class	Other
Price List	2100785COPY3

Buttons: OK, Cancel, Clear, Help

- **Modifier Number From/To:** Enter the range of modifier numbers for which you want the report generated.
- **Modifier Name From/To:** Enter the range of modifier names.
- **Modifier Version From/To:** Enter the range of modifier versions.
- **Start Date Active/End Date Active:** Enter the range of dates for the active modifiers.
- **Active Modifier Only:** Select Yes to display only active modifier lists and No to display all modifier lists.
- **Active Modifier Lines Only:** Select Yes to display only active modifier lines or No to display all modifier lines.
- **Item Name:** Select item name criteria to display modifiers for the item names you specify.
- **Item Category:** Select item category criteria to display modifiers for the item categories listed.
- **Customer Name:** Select customer name criteria to display modifiers associated with the specified customer names.
- **Customer Class:** Select customer class criteria to display modifiers assigned to the specified customer classes.
- **Price List:** Select the price list criteria to display modifiers associated with the specified price list.

Price Lists report

This report displays the following price list information:

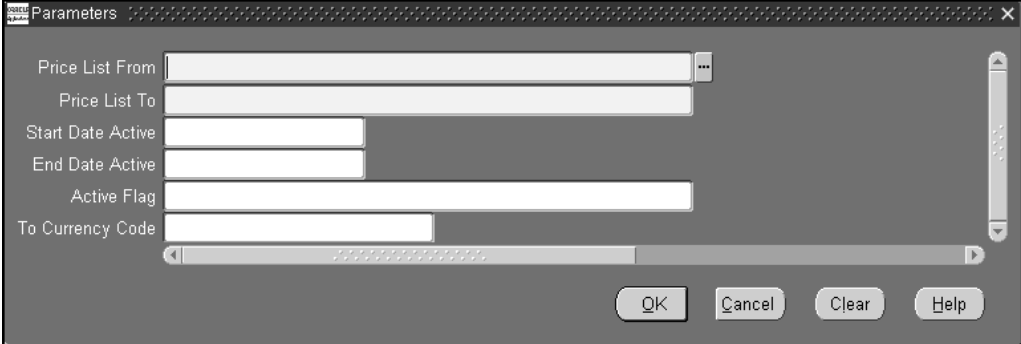
- Report by price list name.
- Options to print report for active and inactive price lists based on effectivity date. If multi-currency is enabled, prints other currency setup if the price list is multi-currency enabled.
- Display all other header information. If price list is multi-currency enabled, report includes header information from the associated Multi-Currency Conversion list.
- Qualifiers attached to price list.
- Secondary price lists attached to price list.
- Detail of list lines attached to price list.
- Detail of item (for example, inventory item, service item).
- Pricing attributes for item.
- Price breaks for item.
- Price Formulas attached to price list line.

Report Submission

In the Submit Request window, Name field, select Price Lists.

Report Parameters

Price List Report parameters

A screenshot of a software dialog box titled "Parameters". It contains several input fields: "Price List From" and "Price List To" (both with dropdown arrows), "Start Date Active" and "End Date Active" (date pickers), "Active Flag" (a text field), and "To Currency Code" (a dropdown menu). At the bottom right, there are four buttons: "OK", "Cancel", "Clear", and "Help".

- Price List From/Price List To: Enter a price list or a range of price lists.
- Start Date Active/End Date Active: Enter a date or a range of dates.
- Active Flag: Enter Yes to display active price lists only or No to display all price lists. The default is Yes.
- To Currency Code: Select one Currency To multi-currency conversion list setup information or None.

If the multi-currency feature is enabled for a price lists, the names of the attached Currency Conversion Criteria, Base Markup Operator, Base Markup Value, and Base Markup Formula are returned.

Pricing Formulas report

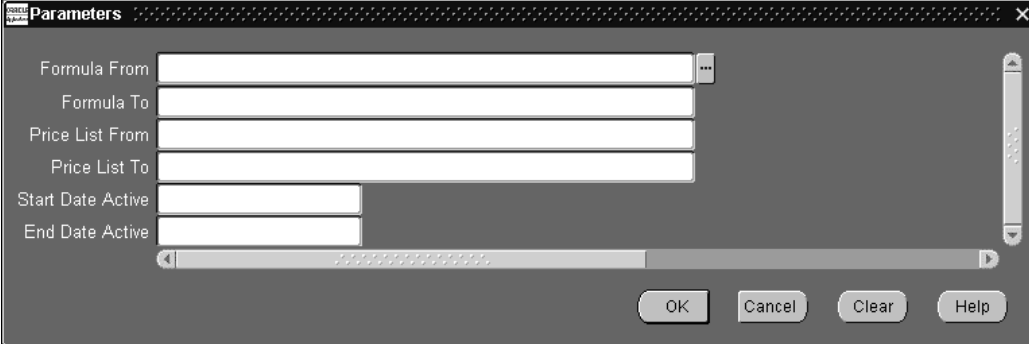
This report displays pricing formulas and their details, including factor lists.

Report Submission

In the Submit Request window, Name field, select Pricing Formulas.

Report Parameters

Pricing Formulas Report parameters

A screenshot of a software dialog box titled "Parameters". It contains several input fields: "Formula From" with a dropdown arrow, "Formula To", "Price List From", "Price List To", "Start Date Active", and "End Date Active". At the bottom, there are four buttons: "OK", "Cancel", "Clear", and "Help".

- Formula From/To: Enter an individual formula or range of formulas.
- Price List From/To: Enter an individual price list or a range of price lists.
- Start Date Active/End Date Active: Enter an individual date or a range of dates.

Purge Pricing Engine Requests program

This program purges all pricing engine requests or selected requests. The program should be run on a regular basis to purge the historical data from the pricing debug tables. This improves the performance of the Pricing Engine Request Viewer window.

Report Submission

In the Submit Request window, Name field, select Purge Pricing Engine Requests.

Report Parameters

Purge Pricing Engine Requests parameters

A screenshot of a software dialog box titled "Parameters". It contains two input fields: "Keep Last (N) Days of Requests" with the value "30" entered, and "Request Name" with the text "Samp" entered. At the bottom, there are four buttons: "OK", "Cancel", "Clear", and "Help".

This program has two input parameters:

- **Keep Last (N) Days of Requests:** Enter a number of days. The pricing engine will purge requests older than the number of days entered. For example, enter 30 to keep requests created in the last 30 days. Requests older than 30 days are purged.
- **Request Name:** Enter a Request Name to delete the pricing engine requests that fully or partially match the name you enter.

Recovery

None

QP: Bulk Import of Price List program

The QP: Bulk Import of Price List program is a concurrent program that enables you to import price lists (bulk load) from interface tables into the Oracle Advanced Pricing tables.

This provides an efficient alternative to existing APIs for validating and loading large pricing data into pricing tables. To improve processing efficiency, the concurrent program can be scheduled to run at optimal times such as when no active users are on the system.

The profile option QP: Batch size for Bulk Upload(QP_BATCH_SIZE_FOR_BULK_UPLOAD) can be set to restrict the number of records read to the PL SQL tables. This helps you improve the bulk import performance. The initial value is seeded as 1000 but you can change this value to suit your hardware configuration. See the *Advanced Pricing Implementation Manual*, Profile Options for more information.

When to use the QP: Bulk Import of Price List program

Your business practices may require that you upload price list data on a regular basis such as those described in the following scenarios:

- When a new price list needs to be created by uploading a price change file.
- When new products lines are created, new offerings to new channels, acquisitions of product lines or companies, new product rollout, and new price list creations.
- When implementing a new sales territory, to bulk load existing price lists or to upload pricing from regions that may have their pricing on spreadsheets.

QP: Bulk Import of Price List enables you to complete the following tasks:

- Do bulk validations and bulk loading.
- Provide all validation error messages in the same run for records that were not uploaded rather than returning errors one after another.
- Provides ability to multi-thread the interface loader similar to Order Import with the ability to multi-thread within the same price list.

Multi-threading Ability

Multi-threading occurs when the child concurrent processes are initiated after a user submits the Process Parent request. Parent process first processes the list header records, then the qualifiers records, then the value-to-ID conversions before spawning child processes. The child processes upload price list lines and attributes.

Multi-threading enables you to do the following:

- This program only updates the IDs derived from Value-To ID conversions back to the interface tables. If a record results in errors, the record remains in the interface tables where the IDs can be viewed.
- Use the same interface program and tables for updating the pricing data.
- Updating price list headers, lines, pricing attributes, qualifiers, and breaks are supported using the interface tables.
- Deleting price list lines, pricing attributes, qualifiers, and breaks is supported using the interface tables.
- Store the interface program id in the main pricing tables so you know which batch ID updated the records.
- Optionally, use the Process Parent parameter in the concurrent program to load list lines even if the pricing attribute validation fails. If the Option is NO, and a pricing attribute fails, both parent and child lines will not be uploaded.
- Mark a record as being processed so that multiple processes do not pick up the same record.
- Automatically deletes the successfully uploaded rows from the interface tables.
- Process a specific set rather than the entire eligible data.

Report Submission

In the Submit Request window, Name field, select QP: Bulk Import of Price List.

Report Parameters

QP: Bulk Import of Price List parameters

Parameters

Entity	PRL
Entity Name	Summer Price List
Process ID	
Process Type	
Process Parent	Yes
No of Threads	3

OK Cancel Clear Help

- Entity: Indicates which pricing entity is to be processed. This defaults as PRL (price list) because currently only price lists can be uploaded.
- Entity Name: Enter the name of the price list to be processed. If left blank, all entities of the selected Entity type available for processing in the interface tables will be processed.
- Process ID: This value corresponds to the process_id in the interface tables. The Process ID groups data in the interface table. You can select criteria to specify which records should be processed.

If this field is left blank, all available records for processing will be considered subject to the restrictions entered in Entity Name.

- **Process Type:** This corresponds to the process type listed in the interface tables such as XML.
- **Process Parent:** Select Yes (the default) or No to define if the loader should process a parent record if a child record has an error. Valid values are Yes (the default) or No.
- **No of Threads:** Enter a number that indicates the total number of child processes or threads to achieve multithreading for list lines and their child records. The default value is 1.

Note: Multi-threading can impact the length of processing time required; therefore, it is recommended that you do not exceed the number of Central Processing Units (CPUs) available when running the program. Ideally, this should be scheduled for a slow processing period or when there are few users on the system.

- **Debug On:** Select Yes or No (default):
 - **No:** Select No to improve loading performance; however error messages are not sent to the Debug log.
 - **Select Yes** to have all error messages sent to the Debug Log.

The Debug On parameter only controls the log files. However, error messages, number of records processed, and other related information will be written to the output file regardless of the value set for Debug On.

Table Name	Select	Insert	Update	Delete
QP_INTERFACE_LIST_HEADER	X	-	X	X
QP_INTERFACE_LIST_LINES	X	-	X	X
QP_INTERFACE_QUALIFIERS	X	-	X	X
QP_INTERFACE_PRICING_ATTRIBS	X	-	X	X
QP_INTERFACE_ERRORS	-	X	-	-
QP_LIST_HEADERS_B	-	X	X	X
QP_LIST_HEADERS_TL	-	X	X	X
QP_LIST_LINES	-	X	X	X
QP_QUALIFIERS	-	X	X	X
QP_PRICING_ATTRIBUTES	-	X	X	X
QP_RLTD_MODIFIERS	-	X	X	X

Considerations for running the program

1. **Errors before resubmit:** For records with errors in the interface tables, set the request_id and process status flag columns to NULL so that these records are picked up in the next run. When the Entity Name is specified as a Report parameter, these values do not need to be reset.
2. **Data for error messages in a QP interface table:** The table QP_INTERFACE_ERRORS is populated with the processing errors which are then written to the output file of the concurrent request. Occasionally, this table needs to be purged of this data.
3. **Source System/Pricing Transaction Entity (PTE):** The concurrent program retrieves records only when the Source system code and the PTE code matches with the same profile values or null. The List Source code for BSO (Blanket Sales Order) is never retrieved.
4. **Importance of Log and Output file to current QP profile:** The concurrent request log file provides the processing details. If you enter an Entity Name that is not unique for the eligible records, none will be picked up for processing.

5. **Child Lines-parents and grandparents records must be populated for insert, update, and delete:** To insert, update, or delete records, its corresponding parent and grand-parent (if applicable) records should also be in the interface table and should be eligible to get retrieved by the concurrent program.

QP: Maintains the Denormalized Data in QP Qualifiers

This program populates the denormalized column data in the pricing tables and fixes data corruption specific to the denormalized columns that occur from a patch application or other set-up issues. This program can be run on a periodic basis or if the pricing engine performance decreases.

This program calculates and populates modifier statistics that the pricing engine search optimizer uses to find modifiers by the most direct method. For each modifier at the list and line level, the process calculates information related to its:

- **Qualifiers:** Indicates if the list or line has qualifiers
- **Directness:** Indicates how specific (selective) or non-specific (non-selective) its qualifiers are. More specific qualifiers are more direct.
- **Fastest search path:** The qualifiers in each modifier list and line that are the most direct become primary qualifiers and the remainder become secondary qualifiers. The pricing engine search optimizer searches the primary qualifiers first.

This program automatically runs after you add or change each modifier and recalculates some statistics for that modifier. In addition, you should run it periodically to recalculate all of the statistics for all the modifiers.

Note: The Request log for an automatic run is not saved and cannot be viewed in My Requests if the QP: Maintains the Denormalized Data in QP Qualifiers program runs successfully. The log file is saved and can be viewed only when an exception occurs.


Report Submission

In the Submit Request window, Name field, select QP: Maintains the Denormalized Data in QP Qualifiers.

Run the program during a time when most users are not logged onto the system. You may encounter a record locking problem if this program runs at the same time that the pricing engine is processing calls.

Report Parameters

QP: Maintains the Denormalized Data in QP Qualifiers parameters



The screenshot shows a window titled "Parameters" with a close button (X) in the top right corner. Inside the window, there are three input fields: "List Header ID (Low)", "List Header ID (High)", and "Update Type". The "Update Type" field is currently set to "ALL". To the right of the "Update Type" field, there is a button labeled "Update All". At the bottom of the window, there are four buttons: "OK", "Cancel", "Clear", and "Help".

- List Header ID (Low/High): Enter the range of values for the modifier lists. The two parameters can be the same value but neither can be null.
- Update Type: Select the update type such as All, Denormalized Columns, Factor Pricing Attributes, List Header Phases, Pricing Phases, or Qualification Indicator.

Recovery

None

Qualifier Grouping report

This report shows details for qualifier groups including grouping conditions and effective dates within the group.

Report Submission

In the Submit Request window, Name field, select Qualifier Grouping.

Report Parameters

Qualifier Grouping report parameters

- Qualifier Context: Enter a qualifier context.
- Qualifier Attribute Value From/Qualifier Attribute Value To: Enter an individual qualifier attribute value or a range of qualifier attribute values.
- Start Date Active/End Date Active: Enter a date or a range of dates.

Update Price Lists with Multi-Currency Conversion Criteria

This concurrent program enables you to maintain and use price lists in different currencies. There are a few prerequisite steps before running this program:

1. Apply the multi-currency patch only if you want to use the multi-currency feature.
2. Set the profile QP: Multi-Currency-Installed to Y (Yes). The valid list of values for the profile are Y and N. The default value of the profile is N.
3. Run the concurrent program Update Price Lists with Multi-Currency Conversion Criteria only once.

Report Submission

In the Submit Request window, Name field, select Update Price Lists with Multi-Currency Conversion Criteria.

Report Parameters

Update Price Lists with Multi-Currency Conversion Criteria



Do you want to enable Multi-Currency price lists?: Select Yes to enable multi-currency price lists.

Note: Once the concurrent program has been run successfully, all existing price list or agreement windows will be converted to multi-currency price lists. Users should not return to NON multi-currency price lists. Changing the profile back to No may cause undesired results if conversion criteria have been used. Oracle does not support changing the setting back to No.

Note: The program must be run initially only once to activate the multi-currency feature; otherwise, data corruption may result.

When the concurrent program Update Price Lists with Multi-Currency Conversion Criteria runs, it does the following:

- Adds a new Multi-Currency Conversion field to the Advanced Pricing - Price Lists and Pricing Agreements windows. This field displays the name of the multi-currency list currently attached to the price list—you can select other multi-currency lists from this field; however, only one can be selected at a time.
- Generates a default multi-currency conversion list based on the Base Currency, Currency-To, and Rounding Factor values from existing price lists. This default multi-currency conversion list does not have other currencies or conversion criteria, just the base currency from the base price list. You must add currencies to the newly created multi-currency lists or create new multi-currency conversion lists if you want to include different currencies. The multi-currency conversion list can then be attached to the respective price list.

The following example displays the setup for five price lists before conversion and the multi-currency list created after the conversion:

Currency	Rounding
USD	-2
USD	-2
USD	-3
FRF	-1
CAD	NULL

The concurrent program creates four currency conversion criteria based on the price list currency and rounding factor of the price lists.

Currency	Currency-To	Rounding
USD	USD	-2
USD	USD	-3
FRF	FRF	-1
CAD	CAD	NULL

Attach the multi-currency conversion list to the respective price list. The multi-currency conversion list can then be attached to the respective price list. You must add new currencies to the existing multi-currency lists or create new multi-currency lists with the currencies required for conversion.

Note: Attaching a multi-currency list to the respective price list is a mandatory step—without it the pricing engine cannot use the current price lists as multi-currency price lists.

Once the concurrent program has run, you can create additional multi-currency lists or add existing currencies to the created multi-currency lists.

Recovery

None. Once the concurrent program has been run successfully, do not return to non-multi-currency price lists. All existing price list windows will have been converted to multi-currency price lists. Changing the profile option QP: Multi-Currency Installed back to N (No) may cause undesired results if conversion criteria have been used. Oracle does not support this.

Update Promotional Limit Balances program

Use the Update Promotional Limit Balances program to update promotional limit balances for selected modifier lines.

Report Submission

In the Submit Request window, Name field, select Update Promotional Limit Balances.

Report Parameters

Update Promotional Limit Balances

Parameters

Modifier Number 10% iStore Discount 10% iStore Discount

Modifier Line Number 14696

Limit Number 1

Limit balance Identifier

OK Cancel Clear Help

- Modifier Number: To update limits for a selected modifier, enter the modifier number.
- Modifier Line Number: To update limits for a selected modifier line, enter the Modifier Line Number.
- Limit Number: Enter a Limit Number.
- Limit balance Identifier: Enter the Limit Balance Identifier.

Related Topics

Updating an Existing Limit Balance, page 3-115

Formula Scenarios

Formula Scenarios

This appendix describes the following formula scenarios.

Scenario 1

Splinters Glass Company manufactures windshields for cars and trucks. It sells both to wholesale customers and to retail customers.

To its retail customers, Splinters prices windshields based on the dimension of the sheet of glass according to the formula 3 currency units * Width * Height * Thickness Factor.

The following table shows the thickness factors.

Glass Thickness	Thickness Factor
< 5 mm	10%
5 mm - 10 mm	15%
> 10 mm	20%

Splinters sets up Oracle Pricing to use formula and factor-based pricing.

Step 1 - Define flexfields:

1. Define three new pricing attributes flexfield segments—width, height, and thickness—using the context of Pricing Attributes.
2. Save your work and close the window.

Step 2 - Create a pricing formula:

1. Create a formula header..
 - Formula Name: Glass Pricing Formula and Formula = 1 * 2 * 3 * 4
2. Create a formula line.
 - Formula Type: Numeric Constant
 - Component: 3
 - Step Number: 1
3. Create a second formula line.
 - Formula Type: Pricing Attributes

- Pricing Attribute Context: Pricing Attributes
 - Pricing Attribute: Width
 - Step Number: 2
4. Create a third formula line.
 - Formula Type: Pricing Attributes
 - Pricing Attribute Context: Pricing Attributes
 - Pricing Attribute: Height
 - Step Number: 3
 5. Create a fourth formula line.
 - Formula Type: Factor List
 - Component: Thickness Factor
 - Step Number: 4
 6. Click Factors.
 7. In the Base Pricing Attributes region, create a row.
 - Base Pricing Attribute: Thickness
 - Comparison Operator: Between
 - Value From: 0
 - Value To: 5
 - Adjustment Factor: 0.10
 8. Create a second row in the Base Pricing Attributes region.
 - Base Pricing attribute: Thickness
 - Comparison Operator: Between
 - Value From: 5
 - Value To: 10
 - Adjustment Factor: 0.15
 9. Create a third row in the Base Pricing Attributes region.
 - Base Pricing Attribute: Thickness
 - Comparison Operator: Between
 - Value From: 10
 - Adjustment Factor: 0.20
 10. Save your work and close the window.

Step 3 - Create a price list for retail customers, create a list line, and attach the formula:

1. Create a price list.
 - Name: Retail

- Select the Qualifiers tabbed region.
2. Add a qualifier.
 - Context: Customer
 - Attribute: Customer Class
 - Value: Retail
 3. Create a new list line.
 - Item: Windshield
 - Dynamic Formula: Glass Pricing Formula
 - UOM: Each
 - Method: Amount
 - Line Type: PLL
 4. Save your work and close the window.

Scenario 2

To its retail customers, Splinters charges for its windshield warranty protection plan at 10% of the cost of the replacement windshield. The formula is 10% * price of the Windshield item on the Replacement price list). Splinters sets up Oracle Pricing to use formula-based pricing.

Step 1 - Create a new pricing formula:

1. Create a formula header.
 - Formula Name: Warranty Pricing Formula
 - Formula: 1*2
2. Create a formula line.
 - Formula Type: Numeric Constant
 - Component: 0.10
 - Step Number: 1
3. Create a second formula line.
 - Formula Type: Price List Line
 - Component: Windshield line of Replacement price list
 - Step Number: 2
4. Save your work and close the window.

Step 2 - Create a price list for retail customers, create a list line, and attach the formula:

1. Create a price list.
 - Name: Warranties
2. In the Qualifiers region, add a qualifier.
 - Context: Customer

- Attribute: Customer Class
 - Value: Retail
3. Create a list line.
 - Item: Protection Plan
 - UOM: Each
 - Dynamic Formula: Warranty Pricing Formula
 - Method: Amount
 - Line Type: PLL
 4. Save your work and close the window.

Modifier Scenarios

This appendix covers the following topics:

- Modifier Scenarios
- Discount
- Surcharge
- Price Break
- Other Item Discount
- Promotional Goods
- Coupon Issue
- Item Upgrade
- Terms Substitution
- Freight and Special Charges
- Newprice

Modifier Scenarios

The following scenarios illustrate how to meet business needs by creating modifiers. The scenarios are organized by the following modifier concepts:

- Discount
- Surcharge
- Price break
- Other item discount
- Promotional goods
- Coupon issue
- Item upgrade
- Terms substitution
- Freight and special charges
- Newprice

Discount

Scenario 1

If the customer is a preferred customer or customer spends more than 150 currency units, they receive 10% off the order.

1. Create a modifier.
 - Modifier Type: Discount
 - Modifier Level: Order
 - Application Method: Percent
 - Value: 10
2. In the Line Qualifiers window, create two line qualifiers.
 - Grouping Number: 1
 - Qualifier Context: Volume
 - Qualifier Attribute: Order Amount
 - Operator: Between
 - Value From: 150
 - Grouping Number: 2
 - Qualifier Context: Customer
 - Qualifier Attribute: Customer Class
 - Operator: =
 - Value From: Preferred

Scenario 2

For any ten compact discs purchased by April 2000, the customer receives 2 currency units off.

1. Create a modifier.
 - Modifier Type: Discount
 - Modifier Level: Line
 - End Date: 30 April 2000
 - Product Attribute: Item Category
 - Product Attribute Value: CD
 - Volume Type: Item Quantity
 - Break Type: Recurring
 - Value From: 10
 - Application Method: Lumpsum
 - Value: 2

Scenario 3

For every eight currency units spent on cat food, the customer accrues five shopper points.

1. Create a modifier.
 - Modifier Type: Discount
 - Modifier Level: Line
 - Product Attribute: Item Category
 - Product Attribute Value: Cat Food
 - Volume Type: Item Amount
 - Break Type: Recurring
 - Value From: 8
 - Select Accrue
 - Benefit Quantity: 5
 - Benefit UOM: Shopper Point

Scenario 4

Customers mentioning the Summer Special Promotion (an "Ask For" promotion) get \$5 off of any tennis racket except the FastFireIII model.

1. Create a modifier.

In Modifiers Summary tab

- Modifier No: SUMMER SPECIAL
- Modifier Level: Line
- Modifier Type: Discount
- Automatic box: Selected
- Product Attribute: Item Category
- Product Attribute Value: Tennis Rackets

In Discounts/Charges tab

- Application Method: Amount
- Value: 5

In Advanced tab

- Ask for box: Select. Instructs the pricing engine to apply this modifier only if the customer asks for it.
- Click Exclude. In the Exclude Items window, create an excluded item:
 - Product Attribute: Item
 - Product Value: FastFire III
 - Exclude box: Select

Scenario 5

Customers who buy two bottles of shampoo receive one currency unit off of the third bottle of shampoo.

1. Create a modifier.
 - Modifier Type: Discount
 - Modifier Level: Line
 - Product Attribute: Item
 - Product Attribute Value: Shampoo
 - Volume Type: Item Quantity
 - Break Type: Recurring
 - UOM: Each
 - Value From: 3
 - Application Method: Lumpsum
 - Value: 1

Surcharge

Scenario 1

Customers in the National Accounts territory who spends less than 1000 currency units per order receives a 2% surcharge.

1. Create a modifier.
 - Modifier Type: Surcharge
 - Modifier Level: Order
 - Application Method: Percent
 - Value: 10
2. In the Line Qualifiers window, create two line qualifiers for the modifier.
 - Grouping Number: 1
 - Qualifier Context: Volume
 - Qualifier Attribute: Order Amount
 - Operator: Between
 - Value To: 1000
 - Grouping Number: 1
 - Qualifier Context: Customer
 - Qualifier Attribute: Customer Class
 - Operator: =
 - Value From: National Accounts

Scenario 2

Any customer placing a rush order (delivery required within two days) for replacement motors receives a 50 currency unit surcharge.

1. Create a modifier.

Modifier Type: Surcharge

Modifier Level: Line

Product Attribute: Item Category

Product Attribute Value: Motors, Spare

Application Method: Amount

Value: 50

2. In the Line Qualifiers window, create a qualifier for the modifier. You have created qualifier attribute Days to Requested Delivery and created the appropriate sourcing rules for this attribute.

Grouping Number: 1

Qualifier Context: Order

Qualifier Attribute: Days to Requested Delivery

Operator: Between

Value To: 2

Price Break

Scenario 1

All employees in Company ABC's mobile phone plan receive per minute discounts based on minutes used, as follows:

- 0-120 minutes: 0.5 currency units per minute
- 121-240 minutes: 0.10 currency units per minute
- 241-420 minutes: 0.12 currency units per minute
- > 421 minutes: 0.15 currency units per minute

A customer who uses 150 minutes receives the following discounts:

- 0.5 currency unit per minute discount on 120 minutes
- 0.10 currency unit per minute discount on 30 minutes

1. Create a modifier.

- Modifier Type: Price Break Header

- Modifier Level: Line

- Product Attribute: Item

- Product Attribute Value: Minutes

- Volume Type: Item Quantity

- Break Type: Range

- Adjustment Type: Discount
 - Qualifier Attribute: Customer Name
2. In the Line Qualifiers window, create a qualifier for the price break modifier.
 - Grouping Number: 1
 - Qualifier Context: Customer
 - Operator: =
 - Value From: ABC
 3. In the Price Break Lines region, enter the break lines.
 - Value From: 0
 - Value To: 120
 - Application Method: Amount
 - Value: 5
 - Value From: 121
 - Value To: 240
 - Application Method: Amount
 - Value: 10
 - Value From: 241
 - Value To: 420
 - Application Method: Amount
 - Value: 12
 - Value From: 421
 - Application Method: Amount
 - Value: 15

Scenario 2

Customers who buy cases of TY brand products across an order receive a percent rebate per case as follows:

- 1 - 500 cases: 2% rebate per case
- 501 - 1000 cases: 3% rebate per case
- > 1000 cases: 5% rebate per case

1. Create a modifier.

Modifier Type: Price Break Header

Modifier Level: Group of Lines

Product Attribute: Item Category

Product Attribute Value: TY

Volume Type: Item Quantity

Break Type: Point

- UOM: Case
Adjustment Type: Discount
Select Accrue
2. In the Price Break Lines window, enter the break lines.
Value From: 1
Value To: 500
Application Method: Percent
Value: 2
Value From: 501
Value To: 1000
Application Method: Percent
Value: 3
Value From: 1001
Application Method: Percent
Value: 5

Other Item Discount

Scenario 1

Customers who buy more than three meters of fabric across an order receive 10% off thermal curtain linings and 5% off drapery services.

1. Create a modifier.
Modifier Type: Other Item Discount
Modifier Level: Group of Lines
Product Attribute: Item Category
Product Attribute Value: Fabric
Volume Type: Item Quantity
Break Type: Point
UOM: Yard
Value From: 10
2. In the modifier details, enter the get products.
Product Attribute: Item
Product Value: Thermal Linings
Application Method: Percent
Value: 10
Product Attribute: Item
Product Value: Drapery Services

Application Method: Percent

Value: 5

Scenario 2

Customers who buy six chairs and a coffee table **or** six chairs and 2 standard lamps, will get \$400 off a dining table assuming the dining table is on the order as well.

1. Create a modifier.

Modifier Type: Other Item Discount

Modifier Level: Line

Product Attribute: Item

Product Attribute Value: Dining Chair

Volume Type: Item Quantity

Break Type: Point

UOM: Each

Value From: 6

2. In the modifier details, enter the related product.

Group No: 1

Product Attribute: Item

Product Value: Coffee Table

UOM: Each

Group No: 2

Product Attribute: Item

Product Value: Standard Lamp

Pricing Attribute: Item Quantity

Operator: Between

Value From: 2

UOM: Each

3. In the modifier details, enter the get product.

Product Attribute: Item

Product Value: Dining Table

Application Method: Amount

Value: 400

Promotional Goods

Scenario 1

Customers who buy one bottle of shampoo receive a free bottle of conditioner.

1. Create a modifier.

- Modifier Type: Promotional Goods
 - Modifier Level: Line
 - Product Attribute: Item
 - Product Attribute Value: Shampoo
 - Volume Type: Item Quantity
 - Break Type: Recurring
 - UOM: Each
 - Value From: 1
2. In the modifier details, enter the get product.
 - Product Attribute: Item
 - Product Value: Conditioner
 - Get Quantity: 1
 - Get Price: <price list line for conditioner>
 - Get UOM: Each
 - Application Method: Percent
 - Value: 100

Scenario 2

Customers who buy two bottles of shampoo receive 10% off the purchase of a third bottle of shampoo.

1. Create a modifier.
 - Modifier Type: Promotional Goods
 - Modifier Level: Line
 - Product Attribute: Item
 - Product Attribute Value: Shampoo
 - Volume Type: Item Quantity
 - Break Type: Recurring
 - UOM: Each
 - Value From: 2
2. In the modifier details, enter the get product.
 1. Product Attribute: Item
 2. Product Value: Shampoo
 3. Get Quantity: 1
 4. Get Price: <price list line for shampoo>
 5. Get UOM: Each
 6. Application Method: Percent
 7. Value: 10

Scenario 3

A customer who spends between \$45 to \$100 on an order line receives a free cosmetic bag.

1. Create a modifier line.
 - Modifier Level: Line
 - Modifier Type: Promotional Goods
 - In the Line Qualifiers window, create a qualifier.
 - Grouping Number: -1
 - Qualifier Context: Volume
 - Qualifier Attribute: Line Volume
 - Operator: Between
 - Value From: 45
 - Value To: 100
2. In the Modifier Summary region, select the product that the customer must order to get the free cosmetic bag.
 - Click Define Details to display the Products tab. In the Get region, define the item the customer gets when the Buy item is ordered:
 - Get Product Attribute: Item
 - Get Product Value: Cosmetic Bag
 - Get Quantity: 1
 - Get Price: <price list line for cosmetic bag>.
 - Get UOM: Each
 - Application Method: Percent
 - Value: 100

Coupon Issue

Scenario 1

Customers who buy any product in the Chubo brand receive 10% off any item in the Chubo brand on their next order.

1. Create a modifier list. In the Main tab:
 - Type: Promotion
 - Number: Coupon15
 - Select Active
 - Name: Coupon15
 - Clear Automatic
2. Create a modifier line for the discount.

In the Modifiers Summary tab

 - Modifier Level: Line

- Modifier Type: Discount
 - Product Attribute: Item Category
 - Product Attribute Value: Chubo
 - In the Discounts/Charges tab
 - Application Method: Percent
 - Value: 10
3. Create a second modifier line for the coupon issue and assign it for the modifier line created in step 2.
 - Modifier Type: Coupon Issue
 - Modifier Level: Line
 - Product Attribute: Item Category
 - Product Attribute Value: Chubo
 - Coupon Modifier: <discount modifier from previous step>

Scenario 2

Customers ordering from the website receive a coupon for 10% off a future order.

1. Create a modifier line (for Modifier List Type: Promotion).
 - Modifier Level: Order
 - Modifier Type: Discount
 - Application Method: Percent
 - Value: 10
2. Create a second modifier line for the coupon issue and assign it to the modifier line created in step 1.
 - Modifier Level: Order
 - Modifier Type: Coupon Issue
 - Coupon Modifier: <modifier from step 1>
3. In the Line Qualifiers window, create a qualifier for the Coupon Issue modifier line from step 2. You have created the qualifier attribute Website Domain and created the appropriate sourcing rules for it.
 - Grouping Number: 1
 - Qualifier Context: Customer
 - Qualifier Attribute: Website Domain
 - Operator: =
 - Value From: co.uk

Scenario 3

With any order, receive a coupon for two free bags of coffee on a future order.

1. Create a modifier line.
 - Modifier Type: Promotional Goods

- Modifier Level: Group of Lines, All Items
2. In the modifier details, enter the get product.
 - Product Attribute: Item
 - Product Value: Coffee
 - Get Quantity: 2
 - Get Price: <price list line for bag of coffee>
 - Get UOM: Bag
 - Application Method: Percent
 - Value: 100
 3. Create a second modifier line for the coupon issue and assign it to the modifier from step 1.
 - Modifier Type: Coupon Issue
 - Modifier Level: Order
 - Coupon Modifier: <modifier from step 1>

Item Upgrade

Scenario 1

Customers who order a standard video recorder before end of April 2000 receive a deluxe video recorder for the same price.

1. Create a modifier.
 - Type: Promotion or Deal
 - Date Type: Requested Ship Date
 - End Date: 31 April 2000
2. Assign a modifier line to the modifier list in Step 1. You have defined the item relationship between the standard video recorder and deluxe video recorder.
 - Modifier Type: Item Upgrade
 - Modifier Level: Line
 - Product Attribute: Item
 - Product Attribute Value: Video Recorder Standard
 - Upgrade Item: Video Recorder Deluxe

Scenario 2

Customers who buy a shirt receive the shirt and a tie for the shirt price.

1. Create a modifier. You have defined the item relationship between the shirt and the marketing bill shirt and tie pack.
 - Modifier Type: Item Upgrade
 - Modifier Level: Line
 - Product Attribute: Item

- Product Attribute Value: Shirt
- Upgrade Item: Marketing item shirt and tie pack

Terms Substitution

Scenario 1

Customers who spend more than 1000 currency units on a sofa pay nothing for shipping.

1. Create a modifier:
 - Modifier Type: Terms Substitution
 - Modifier Level: Line
 - Product Attribute: Item Category
 - Product Attribute Value: Sofa
 - Volume Type: Item Amount
 - Break Type: Point
 - UOM: Each
 - Value From: 1000
 - Terms Attribute: Shipping Terms
 - Terms Value: No Charge

Scenario 2

Customers who buy more than 100 currency units of one item on an order receive terms of 2% 30/NET 60.

1. Create a modifier.
 - Modifier Type: Terms Substitution
 - Modifier Level: Line
 - Terms Attribute: Payment Terms
 - Terms Value: 2% 30/NET 60
2. In the Line Qualifiers window, create a qualifier.
 - Grouping Number: 1
 - Qualifier Context: Volume
 - Qualifier Attribute: Order Amount
 - Operator: Between
 - Value From: 100

Freight and Special Charges

Scenario 1

For all low priority shipments, calculate shipping charges by order line total weight as follows:

- 0 - 500 kg: 2.50 currency units
- 501 - 1000 kg: 3.50 currency units
- > 1000 kg: 5.00 currency units

Profile Option QP: Line Weight UOM Code is kg.

1. Create a modifier.
 - Modifier Type: Freight Charge
 - Modifier Level: Line
 - Application Method: Lumpsum
 - Value: 2.50
2. In the Line Qualifiers window, create a qualifier for the modifier from step 1.
 - Grouping Number: 1
 - Qualifier Context: Order
 - Qualifier Attribute: Shipment Priority
 - Operator: =
 - Value From: Low
 - Grouping Number: 1
 - Qualifier Context: Volume
 - Qualifier Attribute: Line Weight
 - Operator: =
 - Value From: 0
 - Value To: 500
3. Create a second modifier.
 - Modifier Type: Freight Charge
 - Modifier Level: Line
 - Application Method: Lumpsum
 - Value: 3.50
4. In the Line Qualifiers window, create a qualifier for the second modifier from step 3.
 - Grouping Number: 1
 - Qualifier Context: Order
 - Qualifier Attribute: Shipment Priority
 - Operator: =
 - Value From: Low
 - Grouping Number: 1
 - Qualifier Context: Volume
 - Qualifier Attribute: Line Weight

- Operator: =
 - Value From: 501
 - Value To:1000
5. Create a third modifier.
 - Modifier Type: Freight Charge
 - Modifier Level: Line
 - Application Method: Lumpsum
 - Value: 3.50
 6. In the Line Qualifiers window, create a qualifier for the third modifier from step 5.
 - Grouping Number: 1
 - Qualifier Context: Order
 - Qualifier Attribute: Shipment Priority
 - Operator: =
 - Value From: Low
 - Grouping Number: 1
 - Qualifier Context: Volume
 - Qualifier Attribute: Line Weight
 - Operator: =
 - Value From: 1001

Scenario 2

Calculate freight handling charge as a 10% markup of actual handling cost.

1. Create a formula.
 - Formula Name: Handling Cost
 - Formula: 1 * 2
2. Create a formula line.
 - Formula Line Type: Pricing Attribute
 - Pricing Attribute Context: Pricing Attribute
 - Pricing Attribute: Handling Cost Amount
 - Step: 1
 - Formula Line Type: Constant
 - Component: 1.1
 - Step: 2
3. Create a modifier.
 - Modifier Type: Freight Charge
 - Modifier Level: Line

- Application Method: Lumpsum
 - Formula: <reference formula Handling Cost from step 1>
4. In the Line Qualifiers window, create a qualifier for the third modifier from step 2.
- Grouping Number: 1
 - Qualifier Context: Order
 - Qualifier Attribute: Freight Cost Type
 - Operator: =
 - Value From: Handling

Newprice

Scenario 1

The following table states the scenario for this newprice example. Following the table, the text analyzes the scenario:

Incompat. Level	Precedence	Bucket	Operator	Value	Engine Selects
1	10	1	NEWPRICE	30	No
1	10	1	NEWPRICE	25	Yes
1	10	1	NEWPRICE	40	Yes

Within the same incompatibility group, when all of the lines have the same Precedence, the pricing engine performs best price processing. The final selling price is in line 2, 25 currency units. In this scenario, the bucket is not important to the result.

Scenario 2

The following table states the scenario for this newprice example. Following the table, the text analyzes the scenario:

Incompat. Level	Precedence	Bucket	Operator	Value	Engine Selects	Adjusted Amount
1	10	1	NEWPRICE	30	Yes	-970
2	10	1	NEWPRICE	25	Yes	-975
3	10	1	NEWPRICE	40	Yes	-960

With different incompatibility levels, the pricing engine evaluates the lines according to buckets. Since all of the lines are in the same bucket, the pricing engine calculates Adjusted Amount from the list price. It calculates the selling price as follows:

- List Price - Sum of the Adjusted Amounts
 $1000 - (970 + 975 + 960) = 1000 - 2095 = -1905$

Scenario 3

The following table states the scenario for this newprice example. Following the table, the text analyzes the scenario:

Incompat. Level	Precedence	Bucket	Operator	Value	Engine Selects	Adjusted Amount
1	10	1	NEWPRICE	30	Yes	-970 (Base price: 1000)
2	10	2	NEWPRICE	25	Yes	-5 (Base price: 30)
3	10	3	NEWPRICE	40	Yes	15 (Base price: 25)

With different incompatibility levels, the pricing engine evaluates the lines according to buckets. Since each line is in a different bucket, the pricing engine calculates Adjusted Amount from the base price of the previous bucket (list price is in bucket 0). It calculates the selling price as follows:

- List Price - Sum of the Adjusted Amounts
 $1000 - (970 + 5 - 15) = 1000 - 960 = 40$

As the pricing engine evaluates the eligible list lines, it resolves incompatibilities in all phases. You can set up your modifiers such that the pricing engine determines most of the list line eligibility at the search stage. Then, the pricing engine calculates the final selling price bucket by bucket.

Windows and Navigator Paths

This appendix covers the following topics:

- Windows and Navigator Paths

Windows and Navigator Paths

Refer to the following sources for other window and application information:

- *Oracle Order Management User's Guide*
- *Oracle Application User's Guide*

The Window Names and Navigation Paths table lists the navigation path for each window or HTML page. The conventions and short names used in the table are described as follows:

- HTML user interface (UI) and SSWA (Self Service Web Application): Identifies a navigation path in the HTML user interface.
- [: Square brackets indicate a [button name or link] that you must click to display the window or HTML page.
- [T]: Square brackets around the letter "T" indicates that you must click a tab.

Window Name	Navigation Path
Add Items to Price List	Price Lists > Add Items to Price List
Adjust Price List	Price Lists > Adjust Price List
Advanced Pricing - Define Modifier	Modifiers > Modifier Setup
Advanced Pricing - Define Modifier (alternate)	Modifiers > Modifier Incompatibility Setup > [Modifiers]
Advanced Pricing: Home Page	SSWA > Oracle Pricing User responsibility > Home
Advanced Pricing - Price Lists	Price Lists > Price List Setup
Advanced Pricing - Pricing Formulas	Pricing Formulas > Formulas Setup
Advanced Search	SSWA > Oracle Pricing User > Price List Maintenance > [Advanced Search] Alternate: SSWA > Oracle Pricing Administrator > Price List Maintenance > [Advanced Search]

Window Name	Navigation Path
Archive Pricing Entities	Archive Purge Pricing Entities > Archive Entity
Assign Attributes	Setup > Attribute Management > Attribute Linking and Mapping > [Assign Attributes]
Attribute Defaulting Rules	Setup > Attribute Mapping > [Defaulting Rules...]
Attribute Mapping,	Setup > Attribute Linking and Mapping > [Link Attributes] > Link Attributes window > [Attribute Mapping]
Bulk Change	SSWA > Oracle Pricing User > Price List Maintenance > [Advanced Search] > [Search] > From Advanced Search page > [Bulk Change] Alternate: SSWA > Oracle Pricing User or Oracle Pricing Administrator > Price List Maintenance > (Do Search) > [Bulk Change]
Bulk Create Privileges	SSWA > Oracle Pricing Administrator Responsibility > Security > Privileges > [Bulk Create Privileges]
Bulk Update Entity Usage	SSWA > Oracle Pricing Administrator Responsibility > Security > Entity Usage > [Bulk Update Entity Usage]
Context Setup	Setup > Attribute Mapping > Context and Attributes
Copy Modifiers	Modifiers > Copy Modifiers
Copy Price List	Price Lists > Copy Price List
Create Entity Set	SSWA > Oracle Pricing Administrator Responsibility > Security > Entity Sets > [Create Entity Set]
Create Line page (modifier) (HTML UI)	SSWA > Oracle Pricing User responsibility > Home page > Shortcuts > Create (Modifier Type) List > (Create modifier) > Next > Update Discount List: Modifier Lines > [Create Line]
Create Price List: General Information (HTML UI)	SSWA > Oracle Pricing User responsibility > Home > Oracle Advanced Pricing: Home page [Shortcuts: Create Price List] Alternate: SSWA > Oracle Pricing User responsibility > Home > Oracle Advanced Pricing: Home page [Lists tab] > Create List
Create Price List: Qualifiers (HTML UI)	SSWA > Oracle Pricing User responsibility > Home > Oracle Advanced Pricing: Home page [Shortcuts: Create Price List] > Create Price List: General Information > [Next] Alternate: SSWA > Oracle Pricing User responsibility > Home > Oracle Advanced Pricing: Home page [Lists tab] > Create List > Create Price List: General Information page [Next]

Window Name	Navigation Path
Defaulting Condition Validation Templates	Setup > Attribute Mapping > [Defaulting Condition Templates...]
Defaulting Setup	Setup > Attribute Mapping
Define Limits	Modifiers > Modifier Setup > Define Modifier (W) > [List Limits] >
Define Modifier	Modifiers > Modifier Setup
Define Modifier - Define GSA price	Price Lists > GSA Pricing Setup
Define Modifier Details	Modifiers > Modifier Setup > [Define Details*]
Descriptive Flexfield Segments	Setup > FlexFields
Detail Change (HTML UI)	SSWA > Oracle Pricing User > Price List Maintenance > [Advanced Search] > From Advanced Search page > [Detail Change] Alternate: SSWA > Oracle Pricing User or Oracle Pricing Administrator > Price List Maintenance > (Do Search) > [Detail Change]
Entity Set Details (HTML UI)	SSWA > Oracle Pricing Administrator Responsibility > Security > Entity Sets > [Set Id]
Entity Sets	SSWA > Oracle Pricing Administrator Responsibility > Security > Entity Sets
Entity Usage	SSWA > Oracle Pricing Administrator Responsibility > Security > Entity Usage
Event Phases	Setup > Event Phases
Exclude Items	Modifiers > Modifier Setup > [Exclude]
Express Create Privilege	SSWA > Oracle Pricing Administrator Responsibility > Security > Privileges > [Express Create Privilege]
Factors	Pricing Formulas > Formulas Setup > [Factors]
Find Personal Profile Values	Setup > Profiles
Find Modifiers	Pricing Organizer
Find Requests	View Concurrent Requests
Find Requests (alternate)	View Concurrent Requests > [Find] > [Find Requests]
Find Formula Factor Lines	Pricing Formulas > Formulas Setup > Advanced Pricing - Pricing Formulas > (Query Formula Name) > Select Formula line > [Factors] > Factors window > Select line which contains the value > [Search icon]
GSA Qualifiers	Price Lists > GSA Pricing Setup > [List Qualifiers]
Incompatibility Groups	Modifiers > Modifier Incompatibility Setup

Window Name	Navigation Path
Link Attributes	Setup > Attribute Linking and Mapping > [Link Attributes]
Log file: request id	View Concurrent Requests > [Find] > [View Log...]
Modifier Lists	SSWA > Oracle Pricing User > Home > Lists {T}, Administrator Responsibility > Modifier Lists
Modifier Lists Search (HTML UI)	SSWA > Oracle Pricing User responsibility > Home > Oracle Advanced Pricing: Home page > [List tab] > Modifier Lists
Modifier Organizer	Pricing Organizer
More Pricing Attributes	Modifiers > Modifier Setup > [Pricing Attributes]
Multi-Currency Conversion List	Price Lists > Multi-Currency Conversion Setup
Oracle Pricing Lookups	Setup > Lookups
Personal Profile Values	Setup > Profiles > [Find]
Price Breaks	Pricing Agreements > Price Breaks
Price Breaks (alternate 1)	Modifiers > Modifier Setup > [Define Details*] > Price Breaks
Price Breaks (alternate 2)	Price Lists > Price List Setup > [Price Breaks]
Price List Maintenance (HTML UI)	SSWA > Oracle Pricing Administrator Responsibility > Price List Maintenance Alternate: Oracle Pricing User > Price List > Maintenance
Price Lists Search (HTML UI)	SSWA > Oracle Pricing User responsibility > Home > Oracle Advanced Pricing: Home page > [List tab] > Price Lists
Pricing Agreements	Pricing Agreements
Pricing Attributes	Pricing Agreements > [Pricing Attributes]
Pricing Attributes (alternate)	Price Lists > Price List Setup > [Pricing Attributes]
Pricing Engine Request Viewer	Pricing Engine Request Viewer
Pricing Formulas	Pricing Formulas > Formulas Setup
Pricing Organizer	Pricing Organizer
Pricing Transaction Entity-Attribute Linking	Setup > Attribute Management > Attribute Linking and Mapping
Privileges	SSWA > Oracle Pricing Administrator Responsibility > Security > Privileges

Window Name	Navigation Path
Privileges Summary	SSWA > Oracle Pricing Administrator Responsibility > Security> Privileges > [Bulk Create Privileges] > Complete Bulk Create Privileges Step 1 to 3 > [Submit]
Purge Pricing Entities	Archive Purge Pricing Entities > Purge Entity
QUALIFIER - Header Level Qualifiers	Modifiers > Modifier Setup > [List Qualifiers] > [Cancel]
QUALIFIER - Line Level Qualifiers	Modifiers > Modifier Setup > [Line Qualifiers] > [Cancel]
Qualifier Group	Qualifier Setup
Qualifier Groups - List	Modifiers > Modifier Setup > [List Qualifiers]
Qualifier Groups - Line	Modifiers > Modifier Setup > [Line Qualifiers]
Qualifiers (HTML UI)	SSWA > Oracle Pricing User responsibility > Find or create Modifier/Price List > List Qualifiers > Qualifiers page [Append Group] Alternate: SSWA > Oracle Pricing User responsibility > Find or create modifier line/price list line> List Qualifiers > Qualifiers page [Append Group]
Qualifiers: Append Group (HTML UI)	SSWA > Oracle Pricing User responsibility > Qualifiers page [Append Group]
Redeem Accruals	Modifiers > Accrual Redemption
Report: request id	View Concurrent Requests > [Find] > [View Output]
Request Detail	View Concurrent Requests > [Find] > [View Details...]
Request Diagnostics	View Concurrent Requests > [Find] > [Diagnostics]
Requests	View Concurrent Requests > [Find]
Segments Summary (Attachment context)	Setup > FlexFields > [Segments]
Segments Summary (alternate 1)	Setups > FlexFields > [Segments] > [New]
Segments Summary (alternate 2)	Setups > FlexFields > [Segments] > [Open]
Source Systems	Setups > Source Systems
Submit a New Request	Reports
Submit a New Request (alternate)	View Concurrent Requests > [Submit a New Request...]
Submit Request	Reports > OK
Update Formula Prices	Pricing Formulas > Update Formula Prices

Window Name	Navigation Path
Update Line (modifier) (HTML UI)	SSWA > Oracle Pricing User responsibility > Lists > Modifier Lists > Modifier Lists Search page (complete search for modifier) > [Update] > Modifier Lines (from Navigation bar) > [Update] Alternate: SSWA > Oracle Pricing User responsibility > Home page (Recently Created Modifier Lists) > [Update] > Modifier Lines (from Navigation bar) > [Update]
Update (Modifier Type): Modifier Lines (HTML UI)	SSWA > Oracle Pricing User responsibility > Lists > Modifier Lists > Modifier Lists Search page (complete search for modifier) > [Update] > Modifier Lines (from Navigation bar) Alternate: SSWA > Oracle Pricing User responsibility > Home page (Recently Created Modifier Lists) > [Update] > Modifier Lines (from Navigation bar)
Update (Modifier Type): General Information (HTML UI)	SSWA > Oracle Pricing User responsibility > Modifier Lists Search page (after completing a search) > [Update] Alternate: SSWA > Oracle Pricing User responsibility > Home page (Recently Created Modifier Lists) > [Update]
Value Sets	Setups > FlexFields > [Segments] > [Value Set]
Value Sets (alternate 1)	Setups > FlexFields > [Segments] > [New] > [Value Set]
Value Sets (alternate 2)	Setups > FlexFields > [Segments] > [Open] > [Value Set]

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