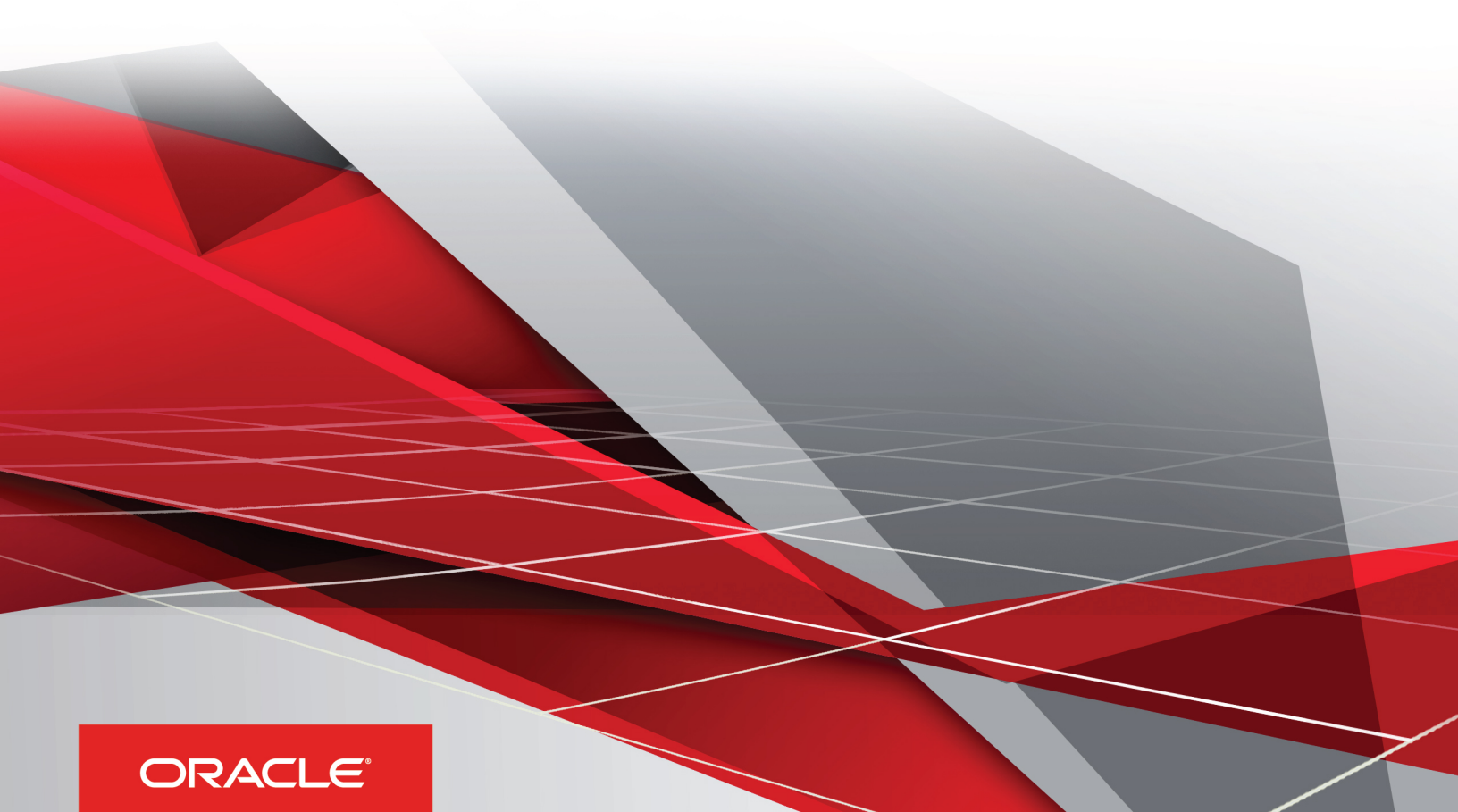
Oracle

SCM Cloud
Administering Pricing

Release 12

This guide also applies to on-premises implementations



Oracle® SCM Cloud Administering Pricing

Part Number E73447-02

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Contents

Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

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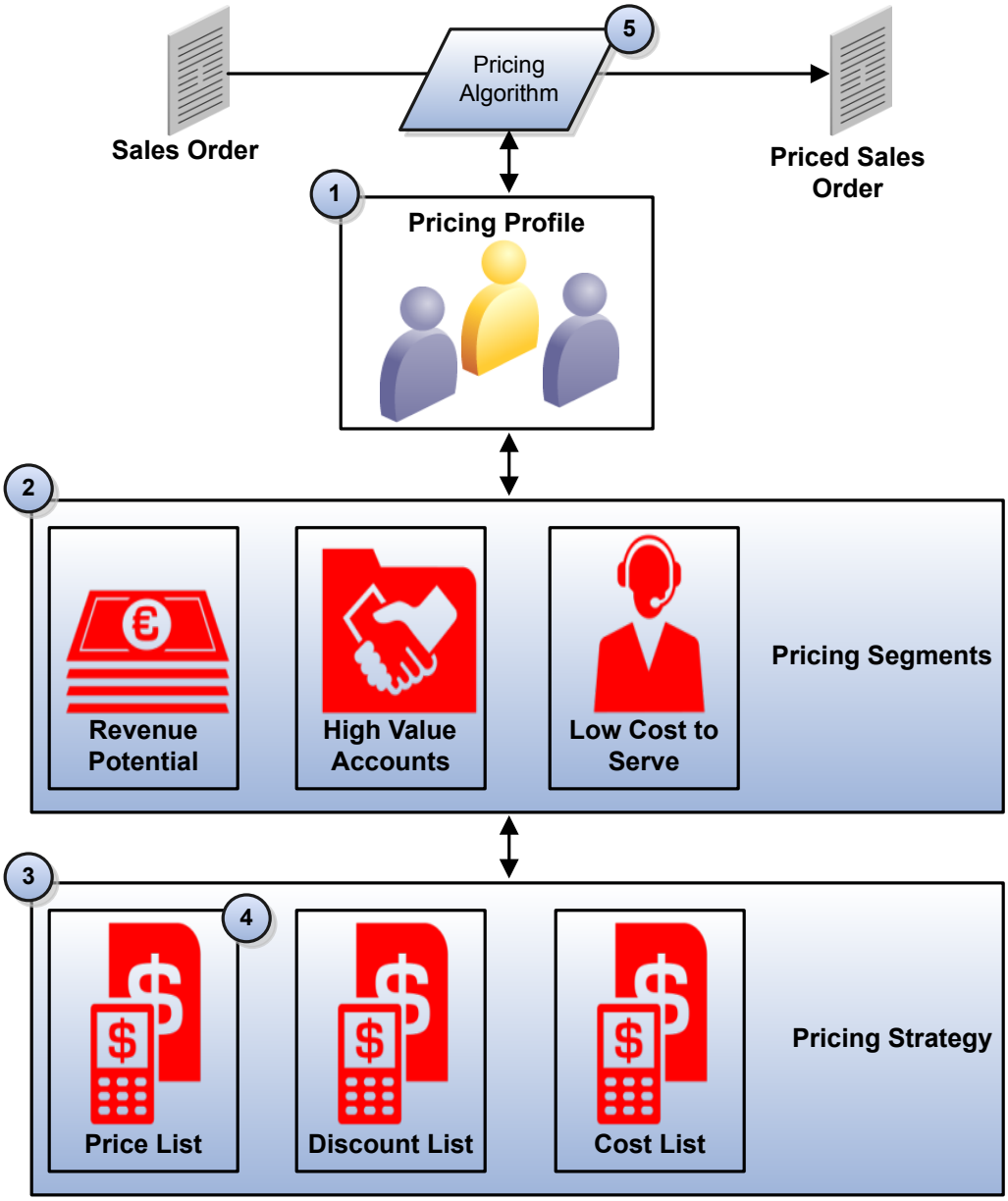
1 Introduction

Oracle Fusion Pricing: Overview

Oracle Fusion Pricing is a pricing solution that you can use to manage pricing for items. You can use it to create pricing rules and pricing algorithms that support your corporate pricing practices.

Pricing administration allows you to design pricing rules that meet your revenue and business objectives so that you can price items for each pricing segment. The pricing architecture allows you to configure and customize predefined logic so that you can implement a pricing algorithm that runs the pricing rules that your deployment requires.

The following diagram illustrates some of the components that you can customize in Pricing:



Explanation of Callouts

You can customize the following components in Pricing:

1. **Pricing Profile.** Categorize customers who exhibit similar characteristics. For example, categorize a customer as high customer size, high customer value, medium customer rating, and high revenue potential.
2. **Pricing Segment.** Assign customers who exhibit similar buying practices to a pricing segment, and then associate this segment with a pricing strategy that meets the business and revenue goals that you set for this segment.
3. **Pricing Strategy.** Implement and enforce corporate pricing strategies and pricing objectives so that they meet your business requirements and revenue requirements. You can group pricing rules in a pricing strategy to control pricing behavior.

4. **Lists.** Create lists, such as a price list, that includes rules that calculate price and shipping charges for an item, and then reference these lists from the pricing strategy. You can do the following work:
    - Apply multiple charges to an item. For example, you can define a charge for a one-time sales price for a desktop computer in one pricing rule, and then apply another charge for maintenance service for this desktop computer that recurs monthly in another pricing rule.
    - Create pricing rules that calculate the base price, list price, price adjustments, discounts, return charges, shipping charges, and so on according to a set of conditions and results.
    - Define currency conversion rules that manage pricing for different currencies.
5. **Pricing Algorithm.** Customize the process that Pricing uses during pricing calculations, including pricing algorithms and service mappings that you can define to meet your business requirements.

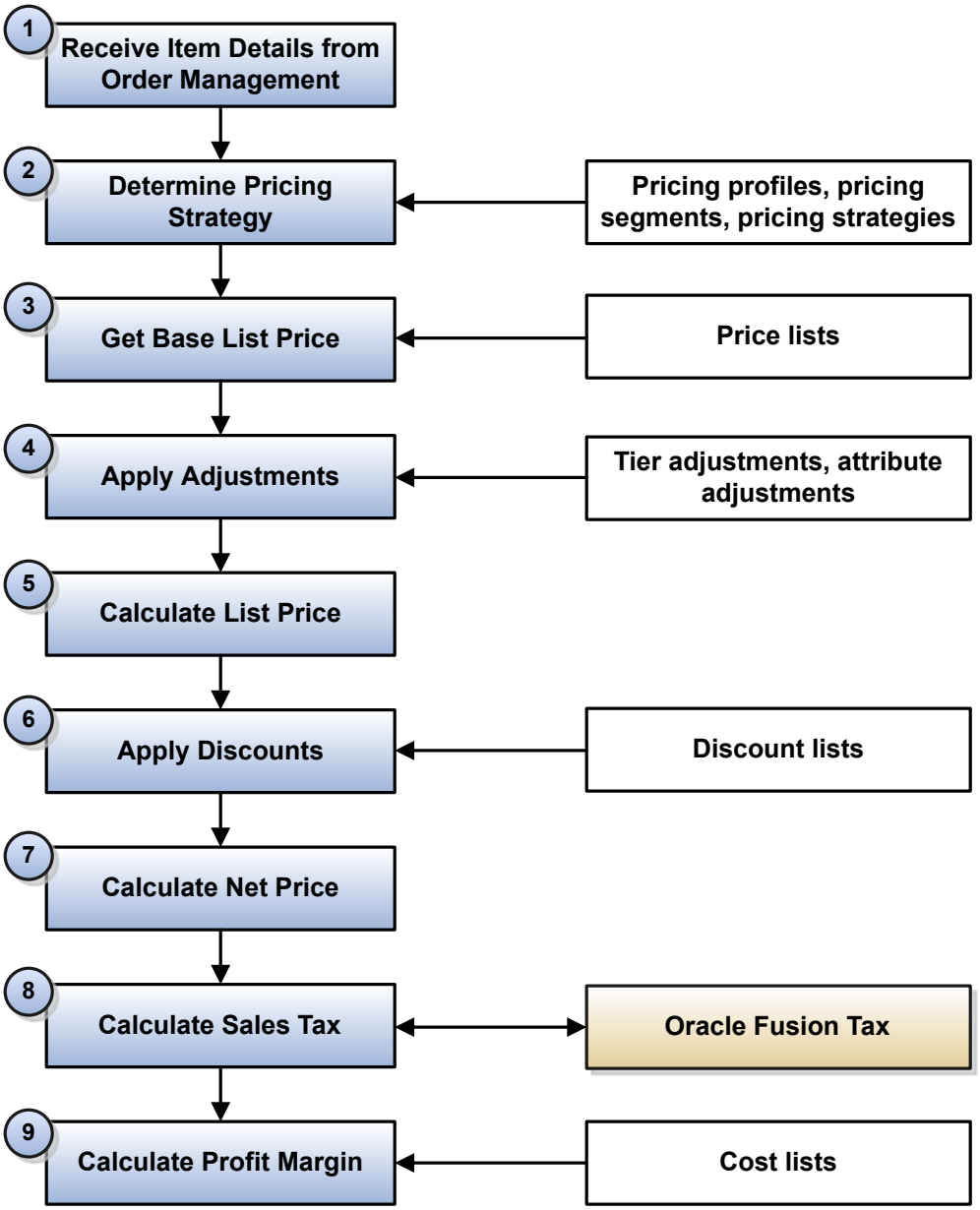
Related Topics

- Profiles, Segments, and Strategies: How They Work Together
- Pricing Architecture: How It Works

Pricing Items: How It Works

Oracle Fusion Pricing uses pricing entities, such as price lists and discount lists, to calculate the price of an item.

For this example, assume you integrate Pricing with Order Management Cloud, and that Pricing must determine charges for the AS54888 Desktop Computer. The following diagram illustrates the work that Pricing does when it prices this item.



This diagram illustrates a simplification of the predefined Price Sales Transaction pricing algorithm, which is the primary algorithm that Pricing uses to price an item. You can modify this pricing algorithm. For details, see Pricing Architecture: How It Works.

Explanation of Callouts

Pricing does the following work when it prices this item:

1. Receives the following item details from Order Management:

Attribute	Value
Customer	Computer Service and Rentals
Business Unit	Vision Operations
Item	AS54888
Unit of Measure	Each
Line Type	Buy
Quantity	2

2. Determines the pricing strategy to use for this item. It uses pricing profiles, pricing segments, and pricing strategies to determine this pricing strategy. For details, see Pricing Profiles, Segments, and Strategies: How They Work Together.
3. Uses a price list that the pricing strategy references to get the base list price for the item. A price list sets the price for each item that you sell. For details, see Managing Price Lists: Procedure.
4. References a tier adjustment or an attribute adjustment, and then applies it to the item. You can specify tier pricing or a pricing matrix to adjust the price that a pricing rule calculates. For details, see Adjusting Prices: Explained.
5. Calculates the list price.
6. References a discount list that applies a discount on the base list price so that it can determine the net price. For example, apply a 10% percent discount off the list price. For details about how to define a discount list that applies a flat rate discount, a percent discount, or that uses a pricing matrix to define a discount according to an item attribute, see Managing Discount Lists: Procedure.
7. Calculates the net price, and then returns the charge and charge components.
8. Calls Oracle Fusion Tax to calculate sales tax for the item. Pricing uses the tax details that Oracle Fusion Tax returns to create charge components for taxes.
9. Calculates profit margin according to costs that the cost lists describe. You can create a cost list that references a variety of charges, such as item cost, sales commission, or labor cost. For details, see Managing Cost Lists: Procedure and Cost Plus Pricing: Explained.
10. Calculate sales order totals.

For this example, Pricing returns the following details to Order Management:

Pricing	Value
Base List Price	$1,000. From the Corporate price list.
Tier Adjustment	Minus $200.
List Price	$800.
10% Discount	Minus $100.
Net Price	$700.

Pricing	Value
Extended Amount	$1400.

Note the following points:

- An item can include one or more charges, and Pricing returns each of these values as a charge. For example, it returns the value of the unit price as the Sale Price Charge.
- This example does not display details about the taxes or profit margins that the pricing algorithm calculates. For details about how to use a service mapping to display these details, see Managing Service Mappings: Procedure.
- Pricing comes predefined to perform most of this work without requiring you to customize pricing logic.

Related Topics

- Pricing Architecture: How It Works
- Profiles, Segments, and Strategies: How They Work Together
- Adjusting Prices: Explained

Managing Oracle Fusion Pricing: Roadmap

Managing Oracle Fusion Pricing includes setup and administration.

Note the following points:

- It is recommended that you do the setup work first, and then the administrative work.
- It is recommended that you do the work in the same sequence that each roadmap lists the topics.
- All steps are optional. This roadmap provides a generic approach to managing Pricing. You might find that you only need to perform a few steps, and in random order, depending on the Pricing functionality that your implementation requires.

Roadmap for Setting Up Pricing

Set up pricing administration:

1. Managing Pricing Charge Definitions: Procedure
2. Managing Price Elements: Procedure
3. Managing Pricing Bases: Procedure
4. Managing Pricing Parameters: Procedure
5. Managing Rounding Rules: Procedure

Set up user interfaces:

1. Managing Pricing Totals: Procedure
2. Managing Pricing Results Presentations: Procedure
3. Managing Pricing Messages: Procedure
4. Managing Pricing Message Tokens: Procedure
5. Managing Pricing Lookups: Procedure
6. Managing Pricing Descriptive Flexfields: Procedure

Roadmap for Administering Pricing

Administer profiles, segments, strategies, and lists:

1. Managing Pricing Profiles: Procedure.
2. Managing Pricing Segments: Procedure.
3. Managing Pricing Strategies: Procedure. Create a pricing strategy but do not add any lists.
4. Managing Price Lists: Procedure.
5. Managing Cost Lists: Procedure.
6. Managing Discount Lists: Procedure.
7. Managing Shipping Charge Lists: Procedure.
8. Managing Currency Conversion Lists: Procedure.
9. Managing Pricing Strategies: Procedure. Add the lists and other objects that you created in steps 4 through 8 to the pricing strategy that you created in step 3.
10. Assigning Pricing Strategies: Procedure.
11. Test your work. Use an Oracle Cloud Application, such as Order Management Cloud, to verify that pricing works correctly.

Administer algorithms, service mappings, and matrixes:

1. Managing Pricing Matrix Types: Procedure
2. Managing Pricing Process Assignments: Procedure
3. Managing Pricing Algorithms: Procedure
4. Managing Service Mappings: Procedure
5. Managing Matrix Classes: Procedure

Quick Start

Use this section if you only need to perform a few tasks, depending on the Pricing functionality that your implementation requires.

Customize How Order Management Displays Pricing Details

Go to the following topics to get started with customizing how Order Management displays pricing details:

Description	Topic
Modify how Pricing calculates the pricing details that Order Management displays for an order line, such as the unit price, list price, sale price, and discount.	Modifying Prices on Order Lines: Procedure
Customize the details that Order Management displays in the Amount dialog.	Modifying Pricing Algorithm Variables: Procedure
Customize the details that Order Management displays in the Total dialog.	Managing Pricing Totals: Procedure
Customize how to display each price element in a price breakdown. For example, display the rounding adjustment in the price breakdown	Managing Pricing Results Presentations: Procedure

Description	Topic
that Order Management displays in the Amount Sale Price dialog.	

Customize Pricing Logic

Go to the following topics to get started with customizing pricing logic:

Description	Topic
Customize the logic that Pricing uses to calculate price. For example, remove the tax calculation.	Modifying Pricing Algorithms: Procedure
Customize the logic that Pricing uses to calculate price. For example, calculate credit before you calculate tax.	Managing Pricing Totals: Procedure
Add a custom attribute to the pricing calculation. For example, add custom freight information to an order line.	Managing Service Mappings: Procedure
Apply conditional logic. For example, apply a different percent discount depending on whether the customer resides in a North, South, East, or West geographical region.	Managing Matrix Classes: Procedure
Customize how Pricing rounds the values that it calculates. For example, round each price to 0.97 or 0.99 for companies that reside in the United States, and round each price to 88 for companies that reside in China.	Managing Rounding Rules: Procedure
Define a pricing rule that controls how Pricing calculates the price for each item. For example: • Set the base price to $500 USD for a cell phone, and allow the user to manually adjust this price. • Add a 5% increase to the invoice price to capture cost of goods sold. • Provide an 8% discount if the customer purchases a recurring service for 12 months, such as a monthly service call. • Price shipping for a Desktop Computer at $50 for Standard Delivery and $100 for Express Delivery. • Define the base price for a computer monitor at $400 USD (United States Dollar), and use a	Pricing Rules: Explained

Description	Topic
1.38 conversion rate to offer it for sale in CAD (Canadian Dollar) at $553.88.	
Use tier pricing or a pricing matrix to adjust the price that a pricing rule calculates.	Adjusting Prices: Explained
Specify a pricing charge definition that determines the total price of an item. For example, you can add a handling fee to an item that currently includes only a sale charge and an administration charge.	Managing Pricing Charge Definitions: Procedure
Specify the basis that Pricing uses to calculate an adjustment according to a percent or amount. For example, sell to a distributor who ships items and handles freight and shipping, but exclude freight charges from your pricing basis.	Managing Pricing Bases: Procedure

Customize Pricing for Strategies and Customers

Go to the following topics to get started with customizing pricing for strategies and customers:

Description	Topic
Use a pricing profile to categorize customers who exhibit similar characteristics. For example, categorize a customer as high size and high revenue.	Managing Pricing Profiles: Procedure
Use a pricing segment to categorize customers, understand their business motivations, and offer a custom pricing solution. Track pricing performance to improve revenue and profit margins.	Managing Pricing Segments: Procedure
Define a pricing strategy that helps you achieve a profitability goal.	Managing Pricing Strategies: Procedure

Related Topics

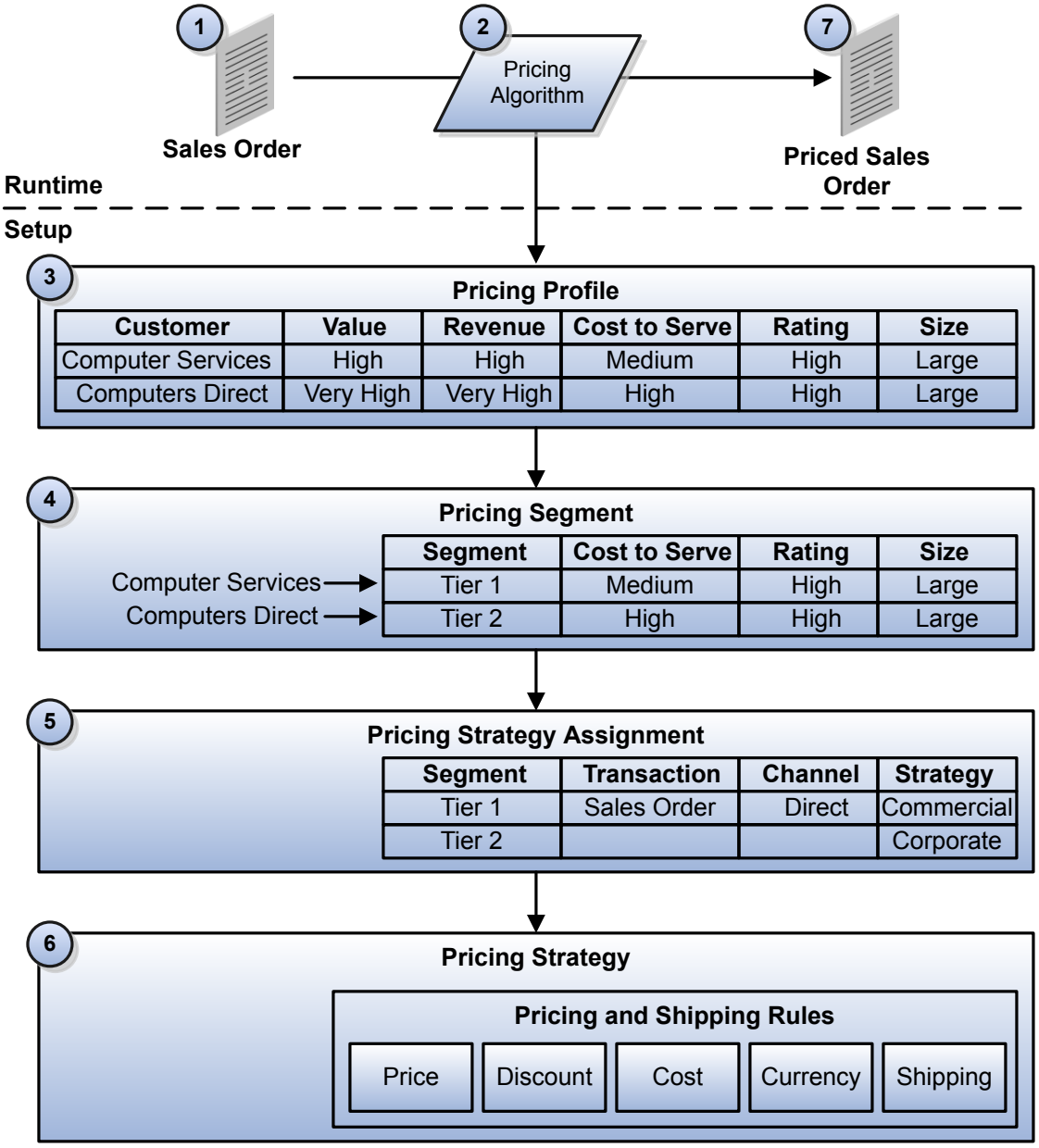
- Pricing Architecture: How It Works
- Profiles, Segments, and Strategies: How They Work Together

2 Managing Profiles, Segments, and Strategies

Profiles, Segments, and Strategies: How They Work Together

Oracle Fusion Pricing uses the pricing profile, pricing segment, pricing strategy assignment, and pricing strategy that you define when it prices a sales order.

The following diagram illustrates how Pricing uses these pricing entities to price a sales order.



Explanation of Callouts

In this example, Pricing does the following work:

1. Receives a sales order from an Oracle Cloud Application, such as Order Management Cloud.
2. Uses a pricing algorithm that references a service mapping, pricing profile, pricing segment, pricing strategy assignment, and pricing strategy to price the sales order at runtime. For example, the pricing algorithm calculates the list price, applies discounts, and applies taxes. For details, see Pricing Architecture: How It Works.
3. Uses the pricing profiles that you define to create a relationship between the pricing attributes that describe buying behavior, and each customer. In this example, assume Pricing receives a sales order for Computer Services, who is

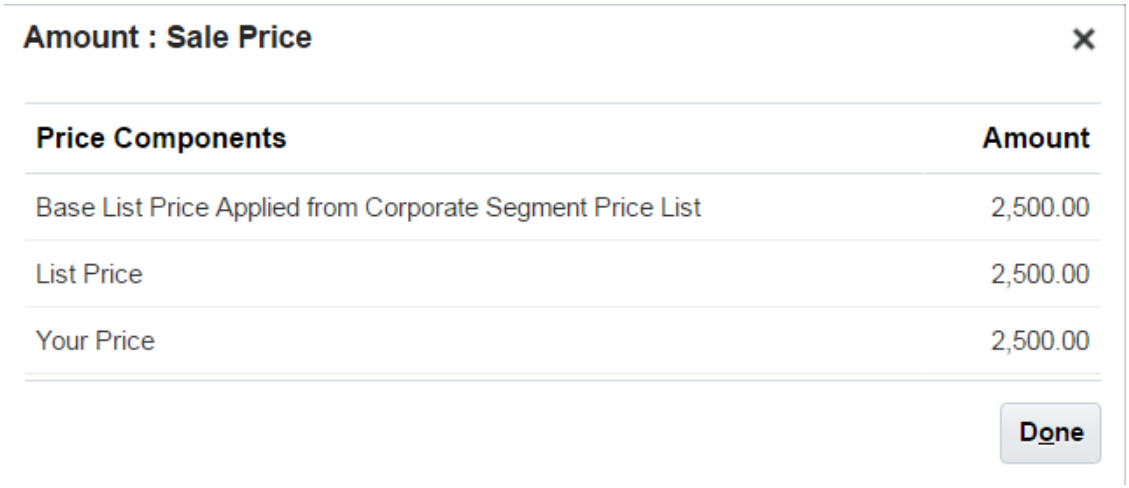
a large, highly valued, and highly rated customer who exhibits high revenue potential and medium cost to serve. For details, see Managing Pricing Profiles: Procedure.

4. Compares each attribute of the pricing profile to each pricing segment until it finds a match. It uses the pricing segments that you define to group customers who exhibit a similar set of characteristics and buying behaviors. For example, you can group large, highly rated customers who exhibit a medium cost to serve into a single segment, such as Tier 1. For this example, the characteristics of the following segment and customer match each other, so Pricing uses the Tier 1 pricing segment for Computer Services:

	Cost to Serve	Rating	Size
Segment: Tier 1 Segment	Medium	High	Large
Customer: Computer Services	Medium	High	Large

5. Uses the pricing strategy assignment that you define to assign a pricing strategy to the customer. You can use different pricing strategies for the same pricing segment to support multiple selling scenarios, or you can use different strategies for different segments. For example, you can create the following assignment rules:
    - If the Pricing Segment is Tier 1, and if the Transaction is Sales Order, and if the Channel is Direct, then use the US Commercial pricing strategy.
    - If the Pricing Segment is Tier 2, then use the Corporate pricing strategy.
6. Uses the pricing strategy to make sure pricing meets the pricing objective. It uses the following lists that the pricing strategy references:
    - Price lists to get the list price for the item
    - Discount lists to get adjustments on the price
    - Cost lists to apply cost plus pricing, when required
    - Currency conversion lists to determine the conversion rate to use, when required
    - Shipping charge lists to get the shipping charges
7. Calculates the sales order total, and then sends the priced sales order, including each pricing charge and charge component, to Order Management.

For example, Pricing can send the following pricing details that Order Management displays for the sales order total:



Related Topics

- Managing Oracle Fusion Pricing: Roadmap
- Oracle Fusion Pricing: Overview
- Pricing Architecture: How It Works
- Pricing Items: How It Works

Managing Pricing Profiles: Procedure

You can use a pricing profile to categorize customers who exhibit similar characteristics. For example, you can categorize a customer as high customer size, high customer value, medium customer rating, and high revenue potential.

This topic includes example values. You might use different values, depending on your business requirements.

Manage pricing profiles:

1. Determine the characteristics that describe each of your customers.

   In this example, assume you work for Vision Corporation, a fictitious company that sells desktop and laptop computers. You need to administer pricing for the following customers:

   - **Computer Service and Rentals, and Professional Computing Solutions**. Each of these businesses are large, long-established customers who have been selling to commercial, domestic corporations for a long time.
   - **Computer Associates International**. A medium size, up-and-coming, new customer who sells to governments and commercial enterprises in domestic and international markets.
   - **Computers Direct to U**. A brand new, just-launched company who sells direct to consumers.

Vision Corporation has determined that these customers exhibit the following characteristics.

Customer	Revenue Potential	Cost to Serve	Value	Rating	Size
Computer Service and Rentals	Very High	Medium	Very High	Very High	Large
Professional Computing Solutions	Very High	Medium	Very High	Very High	Large
Computer Associates International	High	High	Medium	High	Medium
Computers Direct to U	Low	Low	Low	Medium	Small

2. Log in to Oracle Fusion Pricing with the Pricing Manager job role, and then, in the Navigator, click **Pricing Administration**.
3. On the Overview page, click **Tasks**, and then click **Manage Customer Pricing Profiles**.
4. On the Manage Customer Pricing Profiles page, click **Actions**, and then click **Create**.
5. In the Create Customer Pricing Profiles dialog, add values from the table in step 1 for Computer Service and Rentals, and then click **Save and Close**.

   For the Start Date and End Date attributes, note that you can create only one pricing profile for each customer for each time period. You cannot add a customer with multiple pricing profiles in the same time period or in time periods that overlap one another.
6. Repeat steps 4 and 5 for Professional Computing Solutions.
7. Repeat steps 4 and 5 for Computer Associates International.
8. Repeat steps 4 and 5 for Computers Direct to U.
9. Add a pricing segment that Pricing can use to match each customer to a segment.

   For details, see Managing Pricing Segments: Procedure.

Managing Pricing Segments: Procedure

You can use a pricing segment to categorize sets of customers, understand their business motivations, and offer a custom pricing solution. You can also use it to track pricing performance and analyze similar customer situations to help you improve revenue and margins.

For this example, assume you must add a Corporate segment, International segment, and a Domestic segment.

This topic includes example values. You might use different values, depending on your business requirements.

Manage pricing segments:

1. Log in to Oracle Fusion Pricing with the Pricing Manager job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Pricing Segments**.
3. On the Manage Pricing Segments page, click **Create Pricing Segment Matrix**.

If the Manage Pricing Segments page already displays a pricing matrix, then you must click **Delete Pricing Segment Matrix**, click **Yes** in the Warning dialog, close and reopen the Manage Pricing Segments page, and then click **Create Pricing Segment Matrix**. Oracle Fusion Pricing can maintain only one pricing matrix for each deployment.

4. In the Create Pricing Segment Matrix dialog, add a check mark for each condition you must include in the matrix, and then click **OK**.

   It is recommended that you add a check mark to each condition that you require. If a row in your matrix does not require a condition, then you can leave it empty, and Pricing ignores this condition only for this row. Adding each condition simplifies future maintenance if you need to expand your matrix at some time in the future.
5. On the Manage Pricing Segments page, click **Actions**, and then click **Add Row**.
6. Add values for the first row of the following matrix.

Revenue Potential	Size	Cost to Serve	Value	Rating	Segment	Precedence
Very High	Large	Medium	Very High	Very High	Corporate	1
High	Medium	High	Medium	High	International	2
Low	Small	Low	Low	Medium	Domestic	

7. Click **Actions**, click **Add Row**, and then add values from the second row of the matrix in step 6.
8. Click **Actions**, click **Add Row**, and then add values from the third row of the matrix in step 6.
9. Create a pricing strategy to make sure your pricing logic meets the pricing objective.

   For details, see Managing Pricing Strategies: Procedure.

Note the following points:

- Pricing compares the pricing profile to each row of the pricing matrix until it finds a match. If more than one row matches, then Pricing uses the row that contains the lowest value in the Precedence. For example, if the first and second row match, and if the first row contains a precedence of 1, and the second row contains a precedence of 2, then Pricing uses the first row. For details, see Profiles, Segments, and Strategies: How They Work Together.
- You are not required to define a segment. However, it is recommended that you define at least one row that Pricing can use for the pricing strategy, by default.
- Pricing might ignore each attribute in the pricing matrix that includes an empty value, depending on whether or not the matrix class allows an empty value. For example, if the matrix class allows an empty value, then the following row assigns the Corporate pricing segment to every pricing profile that includes a Very High rating. It ignores the empty attributes, such as revenue, size, and value.

Revenue Potential	Size	Cost to Serve	Value	Rating	Segment
				Very High	Corporate

Managing Pricing Strategies: Procedure

You can define a pricing strategy that helps you achieve a profitability goal. It specifies the price lists, cost lists, discount lists, currency conversion lists, shipping rules, and return price lists that Oracle Fusion Pricing uses to help meet the pricing objective of the pricing strategy.

For example, you can create a pricing strategy according to competitor pricing, to sell at a loss so that you can enter a market, to price an item differently for each pricing segment, or to price it high so that customers perceive it favorably.

Note the following:

- The pricing strategy references the pricing objective for the customer, such as to create interest about your item. It also references the prices and pricing policies that Pricing applies to help you accomplish this objective.
- You can add a price list, cost list, discount list, or currency conversion list that you have not yet approved to a strategy, and then approve the strategy. However, Pricing only uses approved lists at run time.
- You can specify whether or not a user can override the default price list.

For the example in this topic, assume you must create a pricing strategy that implements the following functionality:

- Optimizes profit.
- References the Operations business unit of Computer Service and Rentals.
- Reference various lists in Pricing to set the prices, costs, discounts, shipping charges, and currency conversions.

This topic includes example values. You might use different values, depending on your business requirements.

Summary of the Work

To manage a pricing strategy, do the following work:

1. Create the pricing strategy.
2. Define and add lists to this pricing strategy.

Create the Pricing Strategy

Create the pricing strategy:

1. Log in to Oracle Fusion Pricing with the Pricing Manager job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Pricing Strategy**.
3. On the Manage Pricing Strategy page, click **Actions**, and then click **Create**.
4. In the Create Pricing Strategy dialog, set the following values, and then click **Save and Edit**.

Attribute	Description
Name	Enter Corporate Pricing Strategy.
Business Unit	Choose a business unit, such as Computer Service and Rentals Operations.
Default Currency	Choose USD. You can choose the currency that Pricing displays at runtime for items that you associate with this pricing strategy.

Attribute	Description
Default GL Conversion Type	Leave empty. You can choose the currency conversion type that Pricing must use if it cannot find the conversion list when it converts currency in the general ledger.
Objective	For this example, choose Profit Maximization. You can set the Objective to help clarify the purpose of the strategy. This attribute does not affect pricing calculations.
Allow Price List Override	Leave empty. Allows the user to specify some other price list at run time. The current release of Oracle Fusion Pricing does not support this feature.
Allow Currency Override	Leave empty. Allows the user to choose a currency that is different from the currency that you specify for Default Currency. The current release of Oracle Fusion Pricing does not support this feature.

Define and Add Lists to This Pricing Strategy

Define and add the lists that this pricing strategy must reference, such as price lists, discount lists, and so on. You must define these lists before you can add them to this pricing strategy.

Define and add lists to this pricing strategy:

1. Define the lists that this pricing strategy must reference.

   For this example, define the following lists:

List Name	For Instructions, see . . .
Price List for Computer Service and Rentals	Managing Price Lists: Procedure
Cost List for Sentinel Standard Desktop	Managing Cost Lists: Procedure
Discount List for Sentinel Standard Desktop	Managing Discount Lists: Procedure
Shipping Charge List for Sentinel Standard Desktop	Managing Shipping Charge Lists: Procedure
Currency Conversion List for Sentinel Standard Desktop	Managing Currency Conversion Lists: Procedure

2. On the Edit Pricing Strategy page, in the Pricing Rules tab, in the Segment Price Lists area, click **Actions**, and then click **Select and Add**.

You can use each area in the Pricing Rules tab, such as Segment Price Lists, to add a price list. For details about these different types of price lists, see Managing Price Lists: Procedure.

3. In the Select and Add dialog, search for Price List for Computer Service and Rentals, and then click **OK**.
4. Navigate to the Edit Price List page, and then click **Close Tab**.
5. On the Edit Pricing Strategy page, click **Approve**.

   Pricing sets the pricing strategy status to In Progress when you create a pricing strategy, by default. You must approve the pricing strategy so that you can use it in your deployment.
6. In the Segment Price Lists area, in the Name column, click **Price List for Computer Service and Rentals**.
7. On the Edit Price List page, click **References**, and then verify that the Name displays Price List for Computer Service and Rentals.

   Pricing displays each pricing strategy that references this price list.
8. Repeat steps 2 through 7 for each of the other lists that you added in step 1.

   For example, to add Cost List for Sentinel Standard Desktop, on the Edit Pricing Strategy page, click **Costs Lists**, add the cost list, navigate to the Edit Cost List page, click **Close Tab**, and so on.

   Note the following points:

   - You can add the same list to a pricing strategy multiple times, and you can assign a different time frame each time you add it, or you can add can add multiple lists and set different time frames for them. For example, you can add a discount list that provides a 15% discount, and set the dates so that it is in effect from January through March the first time you add it, and in effect June through July the second time you add it.
   - If you add more than one list in an area of the Pricing Rules tab or Shipping Rules tab, then Pricing applies these lists according to the lowest number that you set in the Precedence attribute. For example, assume you add two lists in the Segment Price Lists area. If you set the precedence for list x to 1, and the precedence for list y to 2, then Pricing applies list x first, and then list y.
9. Define the rules that assign a pricing segment to the pricing strategy that you created in this topic.

   For details, see Assigning Pricing Strategies: Procedure.

Related Topics

- Managing Price Lists: Procedure

Assigning Pricing Strategies: Procedure

You can use an assignment matrix to define the rules that assign a pricing segment to a pricing strategy.

In this example, assume you must assign all sales orders that are inside sales for all customers who reside in the Corporate segment. You must assign these sales orders to the Corporate strategy.

This topic includes example values. You might use different values, depending on your business requirements.

Assign a pricing strategy:

1. Log in to Oracle Fusion Pricing with the Pricing Manager job rule, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Pricing Strategy Assignments**.
3. On the Manage Pricing Strategy Assignments page, examine the predefined assignments.

If a predefined assignment meets your business requirement, then it is recommended that you do not create a new one, and you can exit this procedure.

4. Immediately below the page title, click **Actions**, click **Add Row**, and then set the following values.

Attribute	Value
Assignment Level	Header
Pricing Context	Sales
Transaction Type	Sales Orders
Start Date	Choose today's date. The combination of Assignment Level, Pricing Context, and Transaction Type must specify a unique value for each time period. You cannot create identical pricing strategy assignments that include dates that overlap one another.

5. Click **Save**.
6. Click **Create Assignment Matrix**.
7. In the Create Assignment Matrix dialog, add a **check mark** to each option, and then click **OK**.
8. In the Header-Sales area, click **Actions**, click **Add Row**, and then set the following values.

Attribute	Value
Channel Method	Inside Sales
Pricing Segment	Corporate Segment
Transaction Type	Sales Order
Pricing Strategy	Corporate Strategy If you create more than one row in the assignment matrix, then the combination of Assignment Level, Pricing Context, and Transaction Type must specify a unique value for each time period, and these dates must not overlap one another.

You can use the matrix class when you set up Pricing to determine the attributes that you can specify in the assignment matrix. For details, see Managing Pricing Matrix Types: Procedure.

9. Click **Save**.

Related Topics

- Managing Pricing Matrix Types: Procedure

3 Managing Price Lists, Cost Lists, Discount Lists, Shipping Charge Lists, and Currency Conversion Lists

Pricing Rules: Explained

You define pricing rules to control how Oracle Fusion Pricing calculates the price for each item.

You can define a pricing rule for the following pricing entities.

Pricing Entity	Example Rule
Price list	Set the base price to $500 USD for a cell phone, and allow the user to manually adjust this price. For details, see Managing Price Lists: Procedure.
Cost list	Add a 5% increase to the invoice price to capture cost of goods sold. For details, see Managing Cost Lists: Procedure.
Discount list	Provide an 8% discount if the customer purchases a recurring service for 12 months, such as a monthly service call on a commercial kitchen appliance. For details, see Managing Discount Lists: Procedure.
Shipping charge list	Price shipping for a Desktop Computer at $50 for Standard Delivery and $100 for Express Delivery. For details, see Managing Shipping Charge Lists: Procedure.
Currency conversion list	Define the base price for a computer monitor at $400 USD (United States Dollar), and use a 1.38 conversion rate to offer it for sale in CAD (Canadian Dollar) at $553.88. For details, see Managing Currency Conversion Lists: Procedure.

Note the following points:

- You use a separate page to define each type of pricing list. For example, you use the Manage Price Lists page to define a price list. For details, see Managing Price Lists: Procedure.
- The Overview page of the Pricing Administration work area displays pricing rules that you recently updated. You can search this page to locate other pricing rules.
- You must click Access Set when you define a list, and then add an access set. The access set identifies the sales orders that Pricing will process. For example, if you choose Vision Operations Business Unit Set for the access set, then Pricing will only process sales orders that reference the Vision Operations business unit. You can set Access Set to Common to process sales orders for all business units.
- You must click Approve on the page that you use to create the list so that you can add it to a pricing strategy and so the pricing algorithm can use it. You can use the Pricing Administrator or Pricing Manager job role when you log into Pricing and edit a pricing rule. However, Pricing displays Approve only if you log in with the Pricing Manager job role, and only if you have not already approved the list.

- You define a list, add it to a pricing strategy, and then verify this addition. The behavior is similar for any type of list that you define. For details, see Managing Pricing Strategies: Procedure.
- You can define a tier pricing rule that adjusts the price according to the number of items that the customer orders. For example, apply a 10% discount on all items when the customer buys two or three computers, and apply a 15% discount on all items when the customer buys four or more computers. For details, see Adjusting Prices: Explained.
- You can add a pricing matrix that allows you to adjust the charges that you define in each list according to a set of conditions and the value of an attribute. For details, see Adjusting Prices: Explained.

Specifying Attributes for Pricing Rules

You can specify the following attributes for most pricing rules.

Attribute	Description
Business Unit	Specify the business unit where Pricing applies this pricing strategy. The business unit helps you organize and report on pricing and charges according to a management hierarchy, and to make sure Pricing processes data securely for the business unit.
Item	Specify the item that you must add to the list, such as the AS54888 Desktop Computer. If you cannot locate the item you must add, then you must add it to the Product Model. For details, see the guide titled Oracle Fusion, Implementing Product Information Management.
Pricing UOM	Specify the unit of measure, such as Each.
Primary Pricing UOM	Add a check mark to use the value that you set in the Pricing UOM attribute as the primary pricing unit of measure. For details, see the Defining Units of Measure section of this topic.
Service Duration Period	If the item that you add in this line is a service, such as a maintenance service agreement for a computer system, then set the service duration period.
Service Duration	If the item that you add in this line is a service, then set the service duration.
Associated Items	If the item that you add in this line is a configured item, then click the icon in Associated Items to view item details.
Line Type	Choose one of the following values: • **Buy.** The customer is buying the item. • **Return.** The customer is returning the item.
Start Date and End Date	Specify the time period when the rule is available for processing. To create a rule that never expires, leave the End Date empty.

Defining Units of Measure

Pricing does not convert a unit of measure in the current release. For example, assume it receives order lines x and y, the item for each order line is AS54888, but the UOM for order line x is Each and the UOM for order line y is Box of 5. In this

situation, it does not convert Box of 5 to a quantity of 5 and a UOM of Each. It also does not calculate the price for Box of 5 as five multiplied by the price for Each. So, you must add a separate line for the item in the Price List Line tab for each UOM that you sell for AS54888. You can then click Create Charge to specify how to calculate price for Box of 5. For an example, see Managing Price Lists: Procedure.

Note the following points:

- Primary Pricing UOM does not affect pricing calculations or relationships in the current release. Pricing includes it to support converting a unit of measure in a future release.
- You can add only one unique combination of item, unit of measure, and line type for the primary pricing UOM

The following example describes the correct definition for two items where your implementation must support different units of measure for the same item.

Item	Description	Pricing UOM	Primary Pricing UOM
AS54888	Desktop Computer	Each	Contains a check mark
AS54888	Desktop Computer	Box of 5	Does not contain a check mark
CM15140	Computer Monitor	Each	Contains a check mark
CM15140	Computer Monitor	Box of 5	Does not contain a check mark

Defining Pricing for Configured Items

You can define pricing for a configured item in a price list or a discount list.

Note the following points:

- If you deploy a predefined implementation, then you must define pricing for the root item of a configured item, each component of a configured item, each option, and each submodel. You cannot define a charge for the option class.
- You can define pricing according to tier or according to attribute only for the root item.
- You can apply pricing to the root or to the rollup charge when you define a discount on the root item.
- To apply pricing to a rollup charge on a discount list, select **Apply to Rollup** on the root item. Oracle Fusion Pricing calculates the rollup charge at run time. For example, assume the price for the root item is $500, and charges for the components are $50, $30, and $20. Assume you apply a $25 discount on the root item and a 10% discount on the entire configuration. Pricing applies these discounts to the rollup charge. It does the following calculation:

Description	Calculation
Root	$500 price minus $25 discount equals $475
Components	$50 plus $30 plus $20 equals $100
Subtotal	$475 plus $100 equals $575
Percentage discount	10% of $575 equals $57.5

Description	Calculation
Final price	$575 minus $57.5 equals $517.50

You can use the following views:

- **Hierarchical.** Displays the configuration hierarchy.
- **Summary.** Displays a flat structure of the configuration.

Duplicating Lists

You can copy list details to a new list, including pricing rules, modify the new list, and then save your modifications. Copying a list can help you quickly create a new list and avoid errors. You click the Duplicate icon to duplicate a list. For example:

1. Navigate to the Overview page.
2. Click **Tasks**.
3. Click **Manage Discount Lists**.
4. Search for the list you must copy.
5. In the Search Results area, click **Duplicate**.

   Pricing displays a dialog that allows you to specify how to copy the list, such as whether or not to copy discount lines from the original discount list.

Note the following points:

- If you modify the currency when you duplicate a list, then you might not be able to copy the charges that the original list references. For example, assume you duplicate a cost list and modify the currency to CAD (Canadian Dollar). You might not be able to copy the charges because Pricing created them for some other currency, such as USD (United States Dollar).
- If you duplicate charges, then you can copy all charges or only the most current set of charges.

Related Topics

- Profiles, Segments, and Strategies: How They Work Together
- Managing Pricing Strategies: Procedure

Managing Price Lists: Procedure

You can define a price list to set the price for each item that you sell.

Note the following points:

- You can associate multiple price lists with multiple pricing strategies.
- You can create multiple price lists, and then use pricing profiles, pricing segments, and pricing strategies to reference these prices lists with one or more customers.
- If you add a charge to an approved price list, then Pricing automatically approves the pricing entities that the charge references. It approves these entities for use in this price list.
- You can define the pricing charges that a price list contains for each item that the list references. You can define the following types of pricing charges.

Type of Charge	Description
One Time Charge	A one-time charge for an item, such as a one-time fee to establish a phone service.
Recurring Charge	A periodic charge, such as the monthly recurring charge for a phone service.

For the example in this topic, assume you must add a price list that sets the base price for the AS54888 Desktop Computer at:

- $2,500 for each computer
- $10,000 for a box of five computers

This topic includes example values. You might use different values, depending on your business requirements.

This topic describes how to create a pricing rule. For details, including descriptions about some of the attributes that you can set, see Pricing Rules: Explained.

Summary of the Work

To manage a price list, do the following work:

1. Create the price list.
2. Add items to the price list.
3. Add the price list to a pricing strategy.
   Note that you only add the price list to a pricing strategy the first time you create the price list. Pricing automatically implements any changes that you make after you add the price list.

Create the Price List

Create the price list:

1. Log in to Oracle Fusion Pricing with the Pricing Manager job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Price Lists**.
3. On the Manage Price List page, click **Actions**, and then click **Create**.
4. In the Create Price List dialog, set the following values.

Attribute	Description
Name	For this example, enter Price List for Computer Service and Rentals.
Pricing Charge Definition	For this example, choose Sale Price. You can specify the pricing charge definition that represents the value that Pricing calculates during a transaction. In most situations, you choose Sale Price. To verify your choice, examine the values that Pricing displays in the Price List Line Default Values area after you choose. Make sure these values describe the items that you will add to this price list. For details, see Managing Pricing Charge Definitions: Procedure.
Calculation Method	For this example, choose Price.

Attribute	Description
	You can choose one of the following values: o **Price.** Use the value that you set in the Base Price attribute in this price list to calculate the price. o **Cost.** Use cost plus pricing to calculate the price. You add an adjustment to the cost that you define in the cost list, and then Pricing uses this adjustment to determine the base price. For details, see Cost Plus Pricing: Explained.

Note that Pricing will use the values you set in the Price List Line Default Values area of the Create Price List dialog for each item that you add to this price list. For example, if you set the Calculation Method attribute to Price in the Create Price List dialog, and then use the Price List Lines area of this price list to add item AS54888 Desktop Computer, then Pricing will set the Calculation Method attribute to Price in the Charge area for the AS54888 Desktop Computer.

5. In the Type attribute, set one of the following values.

Type	Description
Segment Price List	For this example, choose Segment Price List. Specifies the base price of an item. Choose this type to use the base price when Pricing calculates the invoice price. You use Segment Price List in most situations. You use the pricing profile to segment customers, and then assign this profile to a pricing strategy. Pricing applies the pricing adjustments that other price lists in the pricing strategy specify. It applies these adjustments to the base price, and then uses these adjusted prices to calculate the final invoice price.
Ceiling Price List	Specifies the highest price of any item that you add to this price list. Choose this type to make sure the invoice price of an item does not exceed the ceiling price.
Floor Price List	Specifies the lowest price of any item that you add to this price list. Choose this type to make sure the invoice price of an item is not less than the floor price.
GSA Price List	Choose this type for items that you sell to a government agency. GSA (General Services Administration) periodically sets these prices when it makes the GSA price list available. If the customer is not a government agency, then you cannot set the net price to a value that is less than the GSA price. GSA is an agency of the United States government that manages and supports federal agencies.

6. Click **Save and Edit**.

Add Items to the Price List

Add items to the price list:

1. In the Price List Lines tab, click **Actions**, click **Add Row**, and then set the following values.

Attribute	Value
Item	AS54888

Attribute	Value
Pricing UOM	Each

2. Click **Create Charge**.
3. In the Charge area, set the following value.

Attribute	Value
Pricing Charge Definition	Sale Price
Calculation Method	Price
Base Price	2500

4. Repeat steps 1 through 3 using the following values:

Attribute	Value
Item	AS54888
Pricing UOM	Box of 5
Pricing Charge Definition	Sale Price
Calculation Method	Price
Base Price	10000

Note the following points:

- You must add a separate line in the Price List Line tab for each UOM that you sell for this item.
- You can add multiple charges to a price list line for each item to help manage the price charge so that you can achieve your profitability objective. For example, you can create a separate charge for the sale price, the administration fee, and recurring charges, and then manage them at various levels, such as individual items or all items.

5. Click **Save**, and then click **Approve**.

Add the Price List to a Pricing Strategy

For this example, add this price list in the Segment Price Lists area of the pricing strategy named Corporate Pricing Strategy. For details, see Managing Pricing Strategies: Procedure.

Related Topics

- Managing Pricing Charge Definitions: Procedure
- Managing Pricing Strategies: Procedure

- Profiles, Segments, and Strategies: How They Work Together

Managing Cost Lists: Procedure

Oracle Fusion Pricing comes predefined to apply costs from a cost list. You can also create a cost list that references a variety of charges, such as item cost, sales commission, or labor cost.

You can do the following work:

- Use a cost list to implement cost plus pricing.
- Use a cost list to help calculate part of the profit margin for a charge.
- Separate charges to help you manage and optimize the charges and profit margins for an item, helping you improve your pricing strategy. For example, you can create a separate charge for the transport charge, installation charge, recurring service charge for maintenance, and a one-time administration fee for 50 desktop computers. Oracle Fusion Pricing adds each cost as a charge to the cost list.
- Manage charges at different levels, such as individual items or all items.

For the example in this topic, assume you must add a cost list that includes a $35 fee for maintenance service for the AS54888 Desktop Computer that recurs one time for each month.

This topic includes example values. You might use different values, depending on your business requirements.

This topic describes how to create a pricing rule. For details, including descriptions about some of the attributes that you can set, see Pricing Rules: Explained.

Summary of the Work

To manage a cost list, do the following work:

1. Create the cost list.
2. Add an item to the cost list.
3. Add the cost list to a pricing strategy.

Create the Cost List

Create the cost list:

1. Create the pricing charge definition that Pricing must use to calculate the costs for your cost list.

   You must do this work before you define the cost list. For details, see Managing Pricing Charge Definitions: Procedure.
2. Log in to Oracle Fusion Pricing with the Pricing Manager job role, and then, in the Navigator, click **Pricing Administration**.
3. On the Overview page, click **Tasks**, and then click **Manage Cost Lists**.
4. On the Manage Cost List page, click **Actions**, and then click **Create**.
5. In the Create Cost List dialog, enter the following values, and then click **Save and Edit**.

Attribute	Description
Name	For this example, enter Cost List for Computer Service and Rentals

Add an Item to the Cost List

Add an item to the cost list:

1. Click **Actions**, click **Add Row**, and then set the following value.

Attribute	Description
Item	For this example, add AS54888 Desktop Computer.

2. Click **Create Cost Charge**.
3. In the Cost Charges area, set the following values.

Attribute	Description
Cost Element	Choose Cost of Goods Sold. You can use the cost element to monitor cost through the inventory and accounting life cycle. For example, you can monitor the material cost, overhead cost, or tax cost of an item. You can monitor each of these costs as a separate cost element. Pricing comes predefined to use Cost of Goods Sold, but you can customize your implementation to use other cost elements.
Pricing Charge Definition	For this example, choose Recurring, and then set Price Periodicity to Month. You can use this attribute to specify the type of charge. For example, you can choose one of the following values: o **Sale Price.** Apply this cost to an item that the customer is purchasing. o **Service Price.** Apply this cost to a service that the customer is purchasing, such as a one-time charge to install and setup a network of desktop computers. o **Recurring.** Apply this cost to a recurring service that the customer is purchasing, such as monthly maintenance service for a desktop computer.
Cost Calculation Type	For this example, choose Fixed, and then enter 35 in the Cost Amount. You can specify whether or not Pricing uses a fixed amount or a percentage. For fixed, select **Fixed**, and then enter a value in the Cost Amount attribute. For percentage, select **Percent of Price Element**, and then define the following attributes: o **Cost Basis Element.** Select the price element that Pricing uses to calculate the cost charge, such as Base List Price. o **Cost Percentage.** Enter a number that represents the percent to calculate for the cost charge. You can enter a percentage of a price element, such as 10% of the base list price, ceiling price, invoice price, list price, or net price. Pricing calculates the charge value at run time. For example, to calculate the cost as 15% of the base list price, set Cost Basis Element to Base List Price, and sent Cost Percentage to 15.
Cost Plus Pricing	For this example, leave empty. You can add a check mark to define an item price in terms of cost, such as add a $100 cost markup to the list price. For details, see Cost Plus Pricing: Explained.

Attribute	Description
Cost Method	For this example, leave empty. You can choose the accounting method that your company accounting policies require to account for this cost. This attribute does not affect pricing calculations or relationships. You can use it to help document how you are using this cost list.

4. Scroll to the top of the page, click **Save**, and then click **Approve**.

   If you add a pricing rule to a cost list that you already approved, then Pricing automatically approves the pricing entities that the rule references. It approves these entities for use in this cost list.

Add the Cost List to a Pricing Strategy

For this example, add this cost list to the pricing strategy named Corporate Pricing Strategy. For details, see Managing Pricing Strategies: Procedure.

Related Topics

- Managing Pricing Charge Definitions: Procedure
- Managing Pricing Strategies: Procedure

Cost Plus Pricing: Explained

You can use cost plus pricing to help you calculate and analyze the profit margin that your company earns for an item in terms of the pricing charges that the item references. You can use it to optimize pricing so that it meets the pricing objective that you define.

If you use cost plus pricing, then Oracle Fusion Pricing calculates the item price according to attributes that you set on the price list and the cost list. The cost of an item is the sum of the charges that you define for the item on these lists. Pricing includes only the charges that you enable for cost plus pricing as part of the cost when it calculates the price.

Consider the following example that uses cost plus pricing:

Cost Plus Pricing	Cost Amount	Cost Calculation Type	Markup	Selling Price
Contains a check mark	345	Fixed	55	345 plus 55 equals $400
Does not contain a check mark	345	Fixed	55	345

For example, assume you typically sell a cellular phone according to the price that you define in the Base Price attribute of the price list of $445, and that you set the Calculation Method in the price list to Price. You decide to offer this phone to the customer for $400 using cost plus pricing. You must do the following work:

1. In the price list, set the following attributes:

Attribute	Value
Calculation Method	Cost
Calculation Type	Markup Amount
Cost Calculation Amount	55

2. In the cost list, set the following attributes:

Attribute	Value
Cost Calculation Type	Fixed
Cost Amount	345
Cost Plus Pricing	Add a check mark

Pricing will use the following calculation at run time:

- Cost of $345 plus markup of $55 equals a base price of $400

Managing Discount Lists: Procedure

You can create a discount list to define discounts, profit margins, and price overrides for an item.

Note the following points:

- You can define a discount for a variety of reasons, such as seasonal holiday discount, or volume discount according to price or quantity. For example, assume you create a pricing list that sets the base price of a cell phone at $445 with no other adjustments, which sets the list price at $445. You can define a seasonal discount of 10% from December 10 to January 1, resulting in a net price of $400.50.
- You can apply a flat rate discount or a percent discount.
- You can use a pricing matrix to define a discount according to an item attribute and apply it to the list price at run time. For example, you can mark up the price of an extra large, red shirt by $10, and apply a 7.5% discount for a blue, large shirt.

For the example in this topic, assume you must set up a pricing rule that provides a one-time, $100 discount on the sale price of a new desktop computer.

This topic includes example values. You might use different values, depending on your business requirements.

This topic describes how to create a pricing rule. For details, including descriptions about some of the attributes that you can set, see Pricing Rules: Explained.

Summary of the Work

To manage a discount list, do the following work:

1. Create the discount list.
2. Add an item to the discount list.
3. Add the discount list to a pricing strategy.

Create the Discount List

Create the discount list:

1. Log in to Oracle Fusion Pricing with the Pricing Manager job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Discount Lists**.
3. On the Manage Discount List page, click **Actions**, and then click **Create**.
4. In the Create Discount List dialog, set the following values, and then click **Save and Edit**.

Attribute	Description
Name	For this example, enter Discount List for Sentinel Standard Desktop.
Price Type	For this example, choose One Time. You can specify the type of price that Pricing uses with the item that you add to this discount list. For example: o **One Time.** For a one time purchase of a tangible item, such as a desktop computer. o **Service.** For a recurring purchase, such as a service agreement for a desktop computer that bills monthly.
Charge Type	For this example, choose Sales. You can specify the type of charge that Pricing uses for the item. For example: o **Sale.** For a tangible item, such as a desktop computer. o **Service.** For a service, such as a service agreement for a desktop computer.
Charge Subtype	For this example, choose Price. You can provide more details about the charge, such as whether the charge is a price or a fee. For example, a service charge might include an installation fee and a delivery fee.

Add an Item to the Discount List

Add an item to the discount list:

1. In the Discount Lines tab, click **Actions**, click **Add Row**, and then set the following attributes.

Attribute	Value
Name	AS54888
Description	Sentinel Desktop Computer

Attribute	Value
Pricing UOM	Each

2. In the Discount Rules area, click **Actions**, click **Create**, and then notice the following menu items.

Type of Rule	Description
Simple Rule	For this example, click **Simple Rule**. Allows you to create a simple discount rule, such as: o Give a 5% discount on a one-time sale price. o Give a $5 discount on a recurring maintenance charge.
Tier Based Rule	Allows you to create a discount rule according to order amount or order quantity, such as: o Give a 15% discount on each sales order that is valued at $5,000 to $10,000 or order quantity of 10 to 20. o Give a 25% discount on each sales order that is valued at more than $10,000 or order quantity greater than 20. For details, see Tier Pricing: Explained.
Attribute Based Rule	Allows you to create a discount rule according to an attribute of the charge. For example, to apply a 20% discount on the price of a laptop computer, you must specify the price element that Pricing uses to calculate the 20%, such as the list price, base price, or net price.

3. In the Create Discount Rule dialog, enter the following values, and then click **OK**.

Attribute	Value
Name	New Purchase Discount for AS54888 Sentinel Desktop Computer
Adjustment Amount	100

4. Scroll to the top of the page, click **Access Sets**, and then add an access set.
5. Click **Save**, and then click **Approve**.

Add the Discount List to a Pricing Strategy

For this example, add this discount list to the pricing strategy named Corporate Pricing Strategy. For details, see Managing Pricing Strategies: Procedure.

Related Topics

- Managing Pricing Strategies: Procedure

Managing Shipping Charge Lists: Procedure

You can create a shipping charge list that calculates freight, duty, handling, and insurance charges for an item. For example, you can allow your users to choose 2nd day air delivery for a desktop computer at a price of $75 for each computer, or choose ground transportation at a price of $25.

In this example, assume you must create a shipping charge list that does the following:

- Allows your users to price shipping for the AS54888 Desktop Computer at $50 USD for Standard Delivery and $100 USD for Express Delivery.
- Discounts the shipping charge by 10% if the customer orders a quantity of 5 to 10 computers.
- Discounts the shipping charge by 25% if the customer orders a quantity of more than 10 computers.

This topic includes example values. You might use different values, depending on your business requirements.

This topic describes how to create a pricing rule. For details, including descriptions about some of the attributes that you can set, see Pricing Rules: Explained.

Summary of the Work

To manage a shipping charge list, do the following work:

1. Create a shipping charge list.
2. Create a pricing matrix that adds the discounts.
3. Add the shipping charge list to a pricing strategy.

Create a Shipping Charge List

Create a shipping charge list:

1. Log in to Oracle Fusion Pricing with the Pricing Manager job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Shipping Charge Lists**.
3. On the Manage Shipping Charge Lists page, in the Search Results area, click **Actions**, and then click **Create**.
4. In the Create Shipping Charge List dialog, set values for the following attribute and the other required attributes, and then click **Save and Edit**.

Attribute	Value
Name	Shipping Charge List for Sentinel Standard Desktop

5. On the Edit Shipping Charge List page, in the Shipping Charges tab, click **Items**.

   In this example, you add a shipping charge for a single item. Note that Oracle Fusion Pricing does not support the Flat Rates tab in the current release.
6. Click **Actions**, click **Create**, and then click **Create Item Charge**.

   Note that Oracle Fusion Pricing does not support Create Product Category Charge in the current release.
7. In the Create Item Charge dialog, set the following attributes.

Attribute	Value
Shipping Method	Standard Delivery
Pricing Charge Definition	Freight

8. Click **Actions**, click **Add Row**, and then set the following attributes.

Attribute	Value
Name	AS54888
Calculation Method	Price
Base Price	50
Allow Manual Adjustment	Does not contain a check mark. Note that you cannot allow users to manually adjust the price in the current release of Oracle Fusion Pricing.

9. Click **OK**.
10. Repeat steps 6 through 9, except set the following values.

Attribute	Value
Shipping Method	Express Delivery
Base Price	100

Create a Pricing Matrix That Adds the Discounts

Create a pricing matrix that adds the discounts:

1. In the Search Results area, click **Actions**, and then click **Create Adjustment Matrix**.
2. In the Create Price Adjustment Matrix dialog, add a check mark to each option, and then click **OK**.
3. In the Adjustment Matrix area, add the following matrix.

Minimum Extended Quantity	Maximum Extended Quantity	Adjustment Type	Adjustment Amount
5	10	Discount Percent	10
11		Discount Percent	25

To specify a maximum quantity to infinity, leave Maximum Extended Quantity empty in the row that specifies the highest value.

4. Scroll up, click **Access Sets**, and then add an access set.
5. Click **Save**, and then click **Approve**.

Add the Shipping Charge List to a Pricing Strategy

For this example, add this shipping charge list to the pricing strategy named Corporate Pricing Strategy. For details, see Managing Pricing Strategies: Procedure.

Related Topics

- Managing Pricing Strategies: Procedure

Managing Currency Conversion Lists: Procedure

A currency conversion list specifies the conversion rate between two currencies, such as the US Dollar and the Canadian Dollar. You can also adjust the conversion rate to accommodate changes that occur in company policy, currency fluctuations, international monetary policy, and so on.

Use a currency conversion list to do the following work:

- Define the currencies and conversion rules that Oracle Fusion Pricing uses to calculate prices at run time so the application that requires price details, such as Order Management Cloud, can display prices in the currency that the user is familiar with. If you do not specify a currency conversion list, then Pricing uses the default currency conversion list.
- Define price values in a single currency but offer items in multiple currencies.
- Reduce maintenance because you define only a minimal number of lists in Pricing for a pricing strategy when compared to defining a price list for each currency.
- Limit the currencies that your implementation uses to sell items.

You cannot define a currency conversion list or general ledger conversion, but you can add a conversion rate for the general ledger when you define a currency conversion list.

In this example, assume you must adjust the US Dollar down by 0.99 to the Canadian Dollar using a conversion rate of 1.01.

This topic includes example values. You might use different values, depending on your business requirements.

This topic describes how to create a pricing rule. For details, including descriptions about some of the attributes that you can set, see Pricing Rules: Explained.

Summary of the Work

To manage a currency conversion list, do the following work:

1. Create the currency conversion list.
2. Add a conversion rate to the currency conversion list.
3. Add the currency conversion list to a pricing strategy.

Create the Currency Conversion List

Create the currency conversion list:

1. Log in to Oracle Fusion Pricing with the Pricing Manager job role, and then, in the Navigator, click **Pricing Administration**.

2. On the Overview page, click **Tasks**, and then click **Manage Currency Conversion Lists**.
3. On the Manage Currency Conversion Lists page, in the Search Results area, click **Actions**, click **Add Row**, and then enter the following values.

Attribute	Description
Name	For this example, enter Currency Conversion List for Sentinel Standard Desktop.

Add a Conversion Rate to the Currency Conversion List

Add a conversion rate to the currency conversion list:

1. in the Details area, click **Actions**, and then click **Create**.
2. In the Create Conversion Rate dialog, set the following attributes.

Attribute	Description
Base Currency	For this example, choose USD - US Dollar.
To Currency	For this example, choose CAD - Canadian Dollar.
Conversion Type	For this example, choose Fixed. You can specify the source that Pricing must use for the conversion rate. You can choose one of the following values: o **Fixed.** Define a fixed rate that you specify. If you choose Fixed, then define a rate in the Conversion Rate attribute. o **GL Sourced.** Get rates from the GL (general ledger) conversion list or the General Ledger application. GL fixes rates for a time period, such as a yearly, quarterly, or monthly.
Conversion Rate	For this example, enter 1.01.
GL Conversion Type	For this example, leave it empty. If you set Conversion Type to GL Sourced, then you must set the GL Conversion Type. For example, choose Corporate, Quarterly, Monthly, Spot, EMU Fixed, User Defined, and so on. This attribute does not affect pricing calculations or relationships. It allows you to document how you are using this currency conversion list.
Adjustment Type	For this example, choose Markdown Amount. You can specify how to make the adjustment, such as markdown or markup.
Adjustment Amount	For this example, enter 0.2. You can specify the amount or percent to apply for the adjustment.

3. Click **OK**.
4. Scroll to the top of the page, click **Access Sets**, and then add an access set.

5. Click **Save**.

Add the Currency Conversion List to a Pricing Strategy

For this example, add this currency conversion list to the pricing strategy named Corporate Pricing Strategy. For details, see Managing Pricing Strategies: Procedure.

Example Conversions

Consider the following example conversions that convert USD to CAD with a 1.01 conversion rate:

Adjustment Type	Adjustment Amount	Adjustment Calculated on Conversion Rate	Final Conversion Rate
Markdown Amount	0.2	0.2	1.01 minus 0.2 equals 0.99
Markdown Percent	20%	20% of 1.01 equals 0.202	1.01 minus 0.202 equals 0.808
Markup Amount	0.2	0.2	1.01 plus 0.2 equals 1.21
Markup Percent	20%	20% of 1.01 equals 0.202	1.01 plus 0.202 equals 1.212

Related Topics

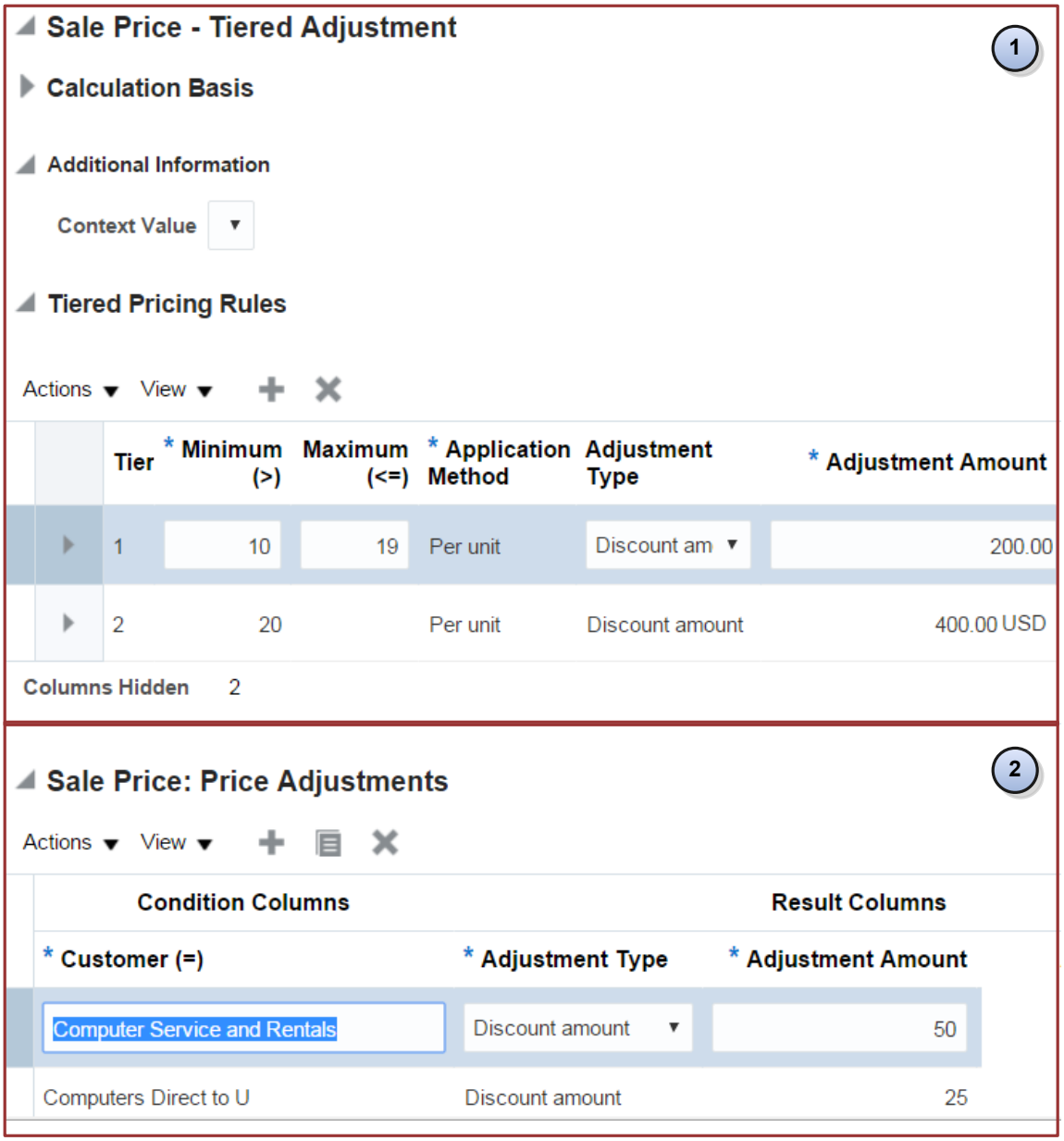
- Managing Pricing Strategies: Procedure
- Profiles, Segments, and Strategies: How They Work Together

Using Tiers and Matrices to Adjust Price

Adjusting Prices: Explained

You can use tier pricing or a pricing matrix to adjust the price that a pricing rule calculates.

For example, assume you define a price list that includes a desktop computer and you set the base price for this item to $2,000. The following diagram illustrates how you can add tier pricing and a pricing matrix to adjust the price for this computer in two different ways.



Explanation of Callouts

This example adds the following adjustments:

1. **Tier pricing.** Allows you to adjust a pricing rule according to quantity or monetary value. For example:
    - If the quantity on the sales order is 10 to 19, then reduce the price for each unit by $200.
    - If the quantity on the sales order is 20 or more, then reduce the price for each unit by $400.
2. **Pricing matrix.** Allows you to adjust a pricing rule according to the value of an attribute. For example:
    - If the customer on the sales order is Computer Service and Rentals, then reduce the total price by $50.
    - If the customer on the sales order is Computers Direct to U, then reduce the total price by $25.

For example, if Computer Service and Rentals orders 10 computers, then this rule performs the following calculation.

Description	Calculation
Base price for each item before tier discount	$2,000.
Tier	The quantity of 10 places the sales order in tier 1.
Tier adjustment	$200 discount for each unit.
Price for each unit after tier adjustment	$2,000 base price minus $200 discount equals $1,800.
Price for all units after tier adjustment	10 unit multiplied by $1,800 equals $18,000.
Adjustment in pricing matrix	$50 discount off total price.
Price after tier adjustment and matrix adjustment	$18,000 minus $50 equals $17,950.

You can add an adjustment to the following lists.

List	Tier Pricing	Pricing Matrix
Price list	yes	yes
Cost list	yes	no
Currency conversion list	no	yes
Shipping charge list	no	yes
Returns price list	no	no

For an example that uses a tier adjustment, see Adding Tiers to Pricing Rules: Procedure.

For an example that uses a pricing matrix, see Managing Shipping Charge Lists: Procedure.

For details about how a matrix class determines the attributes that you can choose in a pricing matrix, see Matrix Classes: Explained.

Related Topics

- Managing Matrix Classes: Explained

Tier Pricing: Explained

You can add tier pricing to a pricing rule to adjust the price according to the number of items that the customer orders.

For example, if the customer buys two desktop computers, then use tier 1 to apply a 10% discount, and if the customer buys four desktop computers, then use tier 2 to apply a 15% discount.

This topic describes some of the attributes that you can set when you define tier pricing. For details about them, see Adding Tiers to Pricing Rules: Procedure.

You can set the Application Method attribute of a tier pricing rule to one of the following values when you specify how Oracle Fusion Pricing applies this rule:

- **Per Unit.** Apply the rule to each unit.
- **As Block.** Apply the rule to a block of units.

Defining Tiers for Each Unit

Apply the tier pricing rule to each unit. For example, if the sales order includes a quantity of four, and if the discount is $1 for each item, then the total discount is $4. You use the following attributes when you define a tier pricing rule for each unit:

Attribute	Description
Minimum	Set the lowest value that defines the tier.
Maximum	Set the highest value that defines the tier.
Set the Apply To attribute to All Tiers	Apply the adjustment that each tier specifies.
Set the Apply To attribute to Highest Tier	If the quantity places the sales order in the highest tier, then apply the adjustment that the highest tier specifies to all items, and ignore all other tiers.

Example of Defining Tiers for Each Unit

For example, assume you must define the following tiers:

- **Tier 1.** If the customer orders a quantity of one to 10 items, then price each item at $50.
- **Tier 2.** If the customer orders a quantity of more than 10 items, then price each item at $45.
- Override the list price with a price that you specify for each tier.

If the sales order includes a quantity of 15 items, then Pricing will assign the following items to tiers depending on whether or not you set the Apply To attribute to All Tiers or Highest Tiers:

Tier	All Tiers	Highest Tier
1	10 items	Not applicable
2	5 items	15 items

Pricing will calculate the following values:

	Minimum	Maximum	Price Override	All Tiers	Highest Tier
Tier 1	1	10	$50	10 items multiplied by $50 equals $500	Not applicable
Tier 2	11		$45	5 items multiplied by $45 equals $225	15 items multiplied by $45 equals $675
Price for All Tiers				$500 plus $225 equals $725	$675

Defining Tiers for Blocks

You use the same attributes to define tiers for blocks of units that you use when you define tiers for each unit, plus a few more. Note the following concepts:

Concept	Description
Block	A quantity of items, such as 100 desktop computers.
Increment	Specifies the size of the block. For example, if you specify the Increment as 100, then the block size is 100.
Partial block	A block that includes only part of the full count of items that the Increment specifies for a block. For example, if the Increment is 100, then any block that includes less than 100 items is a partial block, so a block that includes a quantity of 99 is a partial block.
Satisfied block	A block that includes the full quantity that the Increment specifies for a block. For example, if the Increment is 100, then a block that includes a quantity of 100 is satisfied.

If you set Partial Block Action to:

- **Include Partial Block.** Pricing applies the discount to each partial block and to each satisfied block.
- **Include Satisfied Blocks.** Pricing applies the discount only to each satisfied block.

Examples of Defining Tiers for Blocks

Assume you must define the following functionality:

- **Tier 1.** If the customer orders a quantity of 100 to 1,000 items, then price each item at $10.
- **Tier 2.** If the customer orders a quantity of 1,001 to 2,000 items, then price each item at $5.

- **Tier 3.** If the customer orders a quantity of more than 2,000 items, then price each item at $3.
- Override the list price with a price that you specify for each tier.

If you set the Apply To attribute to Highest Tier Pricing, then Pricing will assign the following quantities to tiers:

Minimum	Maximum	Increment	Item Price
1	1,000	100	$10
1,001	2,000	50	$5
2,001			$3

Example of Using All Tiers or Highest Tier

If the sales order includes a quantity of 2,300 items, then Pricing will assign the following quantities to each tier depending on how you set the Apply To attribute:

Tier	Set Apply To Attribute to All Tiers	Set Apply To Attribute to Highest Tier
1	1,000 items	Not applicable
2	1,000 items	Not applicable
3	300 items	2,300 items

In this example, Pricing will calculate the following values:

	Minimum	Maximum	Increment	Price Override	All Tiers	Highest Tier
Tier 1	1	1,000	100	$10	1,000 items multiplied by $10 each equals $10,000	Not applicable
Tier 2	1,001	2,000	50	$5	1,000 items multiplied by $5 each equals $5,000	Not applicable
Tier 3	2,001			$3	300 items multiplied by $3 each equals $900	2,300 items multiplied by $3 each equals $6,900
Price for All Tiers	Not applicable	Not applicable	Not applicable	Not applicable	$15,900	$6,900

Example of Using Include Partial Block or Include Satisfied Blocks

If the sales order includes a quantity of 850 units, then Pricing will assign all items to tier 1, and will ignore the other tiers. It will calculate the following values depending on whether or not you select Include Partial Block or Include Satisfied Blocks. Assume the list price is $12 each:

	Minimum	Maximum	Increment	Price Override	Include Partial Block	Include Satisfied Blocks
Tier 1	1	1,000	100	$10	850 items multiplied by $10 each equals $8,500	800 items multiplied by $10 each equals $8000
Tier 2	1,001	2,000	50	$5	Not applicable	Not applicable
Tier 3	2,001			$3	Not applicable	Not applicable
Price for All Tiers	Not applicable	Not applicable	Not applicable	Not applicable	$8,500	$8000
List Price for Items Not in Satisfied Bloc	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	50 items multiplied by $12 each equals 600
Total Price for All Items	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	$8600

Related Topics

- Managing Matrix Classes: Explained

Adding Tiers to Pricing Rules: Procedure

You can use tier pricing to adjust a pricing rule.

In this example, you add tier pricing that applies the following logic on each sales order:

- Apply a 10% discount on all items when the customer buys two or three desktop computers.
- Apply a 15% discount on all items when the customer buys four or more desktop computers.

For details about tier pricing and some of the attributes that you set, see Tier Pricing: Explained.

Add tiers to a pricing rule:

1. Create a discount list for the AS54888 Desktop Computer.

   For details, see Managing Discount Lists: Procedure.
2. In the Discount Rules area, click **Actions**, click **Create**, and then click **Tier Based Rule**.
3. In the Create Discount Rule dialog, in the Calculation Basis area, set the following values.

Attribute	Description
Name	Enter Desktop Computer Tiered Discount.

Attribute	Description
Tier Basis Type	For this example, choose Item Quantity. You can choose one of the following values: o **Item Quantity.** Adjust the tier according to the quantity of items that the customer orders. o **Extended Amount.** Adjust the tier according to the total monetary value of the sales order. You must also select a tier basis to specify the price element that Pricing must use to calculate the tier adjustment, such as One Time or Recurring. For details about tier basis and adjustment basis, see Managing Pricing Bases: Explained.
Apply To	For this example, choose Highest Tier. For details, see the Setting the Apply To Attribute section in this topic.
Application Method	For this example, choose Per Unit.
Aggregation Method	For this example, choose On Line. You can choose one of the following values to specify how Pricing calculates the adjustment: o **On Document.** Calculate according to the total quantity or total amount for the entire sales order or document. o **On Line.** Calculate according to the quantity or amount for each order line. Note that Pricing applies the tier rule to each order line regardless of how you set Aggregation Method.
Adjustment Type	For this example, leave Adjustment Type empty because you specify the adjustment type in the Tiered Pricing Rules area. Note the following points: o You can include different adjustment types across tiers. o If you set the Adjustment Type in the header, then Pricing defaults the Adjustment Type in each line to the value that you set in the header. For details, see the Setting the Adjustment Type Attribute section in this topic.
Enforce Adjustment Calculation on Each Tier	For this example, make sure this option does not contain a check mark. If you add a check mark, then Pricing applies the attributes that you specify in the Calculation Basis area, such as Application Method, to each of the rules that you specify in the Tiered Pricing Rules area, and you cannot modify these attributes in the Tiered Pricing Rules area.

4. In the Tiered Pricing Rules area, define the first tier. Click **Actions**, click **Add Row**, and then enter the following values.

Attribute	Value
Minimum	0 Note that Pricing calculates the minimum value as Minimum plus 1. For example, if you set Minimum to 0, then it will use 1 as the minimum value for the tier.
Maximum	3
Application Method	Per Unit
Adjustment Type	Discount Percent
Adjustment Amount	10
Adjustment Basis	List Price If you specify a percent discount, then you must specify the adjustment basis that Pricing uses to calculate the adjustment, such as list price or installation charge. For example, if the list price of a desktop computer is $500, and if you specify List Price as the adjustment basis, and if you specify an adjustment amount of 10%, then the discount is $500 multiplied by .10 equals $50.

5. In the Tiered Pricing Rules area, define the first tier. Click **Actions**, click **Add Row**, and then enter the following values.

Attribute	Value
Minimum	3
Maximum	Leave empty Pricing will use this tier for any sales order that includes a quantity of four or more.
Application Method	Per Unit
Adjustment Type	Discount Percent
Adjustment Amount	15
Adjustment Basis	List Price

6. Click **OK**.
7. On the Edit Discount List page, click **Save**, and then click **Approve**.

Setting the Apply To Attribute

You use the Apply To attribute to specify the tiers that Pricing applies. For example, assume you define the following tiers:

Tier	Quantity	Tier Rule
1	Zero to three	10% discount
2	Four or more	15% discount

Pricing applies these tiers differently depending on you set the Apply To attribute. For example:

Quantity That Customer Orders	Set the Apply To Attribute to All Tiers	Set the Apply To Attribute to Highest Tier
Two	Apply a 10% discount on two items.	Apply a 10% discount on two items.
Four	Apply a 10% discount on three items, and a 15% discount on one item.	Apply a 15% discount on four items.
Six	Apply a 10% discount on three items, and a 15% discount on three items.	Apply a 15% discount on six items.

Setting the Adjustment Type Attribute

You can use the Adjustment Type attribute to specify the following types of tier adjustments. Pricing applies these adjustments to each item, and it applies them to the value of the Adjustment Basis. In this example, Adjustment Basis is List Price, so it applies the adjustment to the list price:

Adjustment Type	Description
Discount Amount	Adjust the price according to the value that you enter. For example, if you enter 15, then decrease the price by $15.
Discount Percent	Adjust the price according to the discount that you specify. For example, if you enter 15, then decrease the price by 15%.
Markup Amount	Adjust the price according to the value that you enter. For example, if you enter 15, then increase the price by 15$.
Markup Percent	Adjust the price according to the markup that you specify. For example, if you enter 15, then increase the price by 15% of the tier basis.
Price Override	Adjust the price according to the value that you enter. For example, if you enter 15, then adjust the price by $15.

Related Topics

- Managing Matrix Classes: Explained

Modifying Prices on Order Lines: Procedure

You can modify how Oracle Fusion Pricing calculates the pricing details that Order Management Cloud displays for an order line.

For example:

- Set the unit price.
- Set the start and end dates when the price applies.
- Use an adjustment matrix. For example, you can apply a discount according to quantity.
- Use a tier adjustment.

For details, see Managing Price Lists: Procedure.

For the example in this topic, assume you must modify a predefined price list that references the AS54888 Desktop Computer so that it uses the following pricing:

- Reduce the base price from $2,500 to $2,000 for each computer.
- If the order line quantity is 10 or more, then discount the sale price by 20%.

This topic includes example values. You might use different values, depending on your business requirements.

Summary of the Work

To modify prices on order lines, do the following work:

1. Examine the current behavior.
2. Modify the price list.
3. Verify your work.

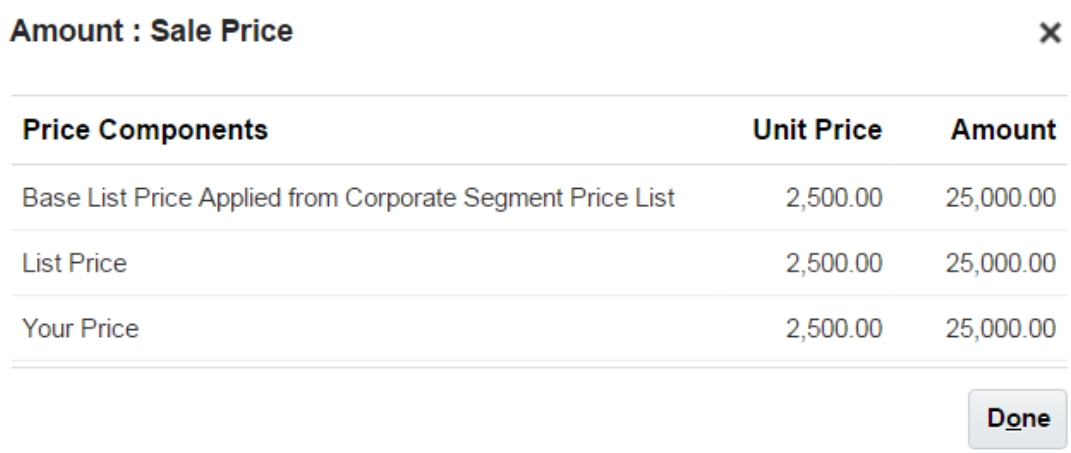
Examine the Current Behavior

Examine the current behavior:

1. Log in to Order Management with administrative privileges.
2. In the Navigator, click **Order Management**.
3. On the Overview page, click **Tasks**, and then click **Create Order**.
4. Complete attributes in the header.
5. In the Order Lines area, add an item. For this example, assume you add the following item:

Attribute	Value
Item	AS54888, Desktop Computer
Quantity	10
UOM	Each
Sale Price	2,500

6. Click **2,500** next to Sale Price, and then examine the following details. You will modify the price list so that it applies a unit price of $2,000, and a discount of 20%.



7. Click **Done**, and then log out of Order Management.

Modify the Price List

Modify the price list:

1. Log in to Oracle Fusion Pricing with the Pricing Manager job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Price Lists**.
3. On the Manage Price List page, enter the following value, and then click **Search**.

Attribute	Value
Name	Corporate Segment Price List

4. In the Search Results, click **Corporate Segment Price List**.
5. On the Edit Price List page, enter the following value, and then click **Search**.

Attribute	Value
Item	AS54888

6. Enter the following value.

Attribute	Value
Base Price	2000

7. Click the **down arrow** next to Create Charge, and then click **Create Price Adjustment Matrix**.
8. In the Create Price Adjustment Matrix dialog, add a check mark to **Ordered Quantity**, and then click **OK**.
9. In the Sale Price: Price Adjustments area, add the following row.

Ordered Quantity	Adjustment Type	Adjustment Amount
10	Discount Percent	20

10. Click **Save and Close**, and then log out of Pricing.

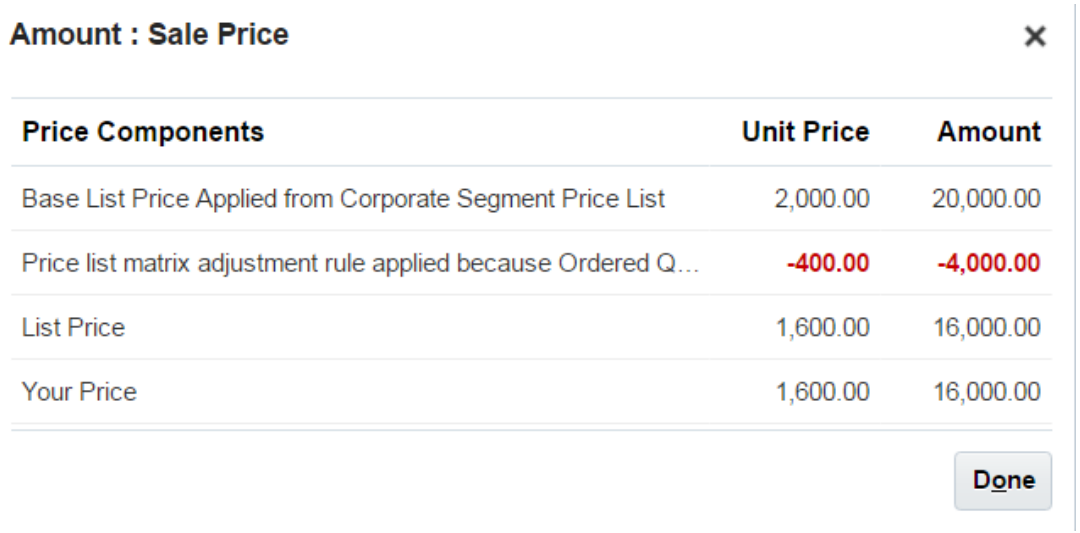
Verify Your Work

Verify your work:

1. Log in to Order Management with administrative privileges.
2. In the Navigator, click **Order Management**.
3. On the Overview page, click **Tasks**, and then click **Create Order**.
4. Complete attributes in the header.
5. In the Order Lines area, add an item. For this example, assume you add the following item:

Attribute	Value
Item	AS54888, Desktop Computer
Quantity	10
UOM	Each
Sale Price	1,600

6. Click **1,600** next to Sale Price, and then verify that the dialog displays the following values.



Related Topics

- Pricing Items: How It Works

Troubleshooting Pricing Rules: Explained

This topic describes some remedies you can try to fix a problem that is not allowing you to use a pricing rule that you create.

If you cannot use a pricing rule, then try the following remedies:

- Make sure you add the list that contains the pricing rule to a pricing strategy.
- Make sure you approve the list. You must click Approve on the page that you use to create the list so that you can add it to a pricing strategy and so the pricing algorithm can use it. Pricing displays Approve only if you log in with the Pricing Manager role, and only if you have not already approved the list.
- Make sure the transaction occurs during the time frame that you specify when you set the start date and end date for the list.

4 Managing Pricing Administration

Managing Pricing Charge Definitions: Procedure

You can create a pricing charge definition that defines the charges Oracle Fusion Pricing combines to determine the total price for an item. For example, an item might include multiple charges, such as a one-time sale charge and an administration charge. You can create a pricing charge definition that adds a handling fee to this item.

You reference a pricing charge definition from a pricing rule that you create in the Pricing Administration work area. For examples, see Managing Price Lists: Procedure and Managing Cost Lists: Procedure.

Manage pricing charge definitions:

1. Log into Order Management with setup privileges, such as ORDER_MGR_OPERATIONS.
2. In the Navigator, click **Setup and Maintenance**.
3. On the Setup and Maintenance page, click **Order Management**, and then click **Setup**.
4. On the Setup page, search for, and then open Manage Pricing Charge Definitions.
5. On the Manage Pricing Charge Definitions page, in the Search area, set Active to **Yes**, and then click **Search**.
6. Examine the pricing charge definitions that come predefined with Pricing, such as for price, shipping, freight, handling, insurance, or returns.

   To reduce maintenance, it is recommended that you use a predefined pricing charge definition instead of creating a new one.
7. If you cannot locate a pricing charge definition that meets your requirements, then click **Actions**, click **Add Row**, and then set the following attributes.

Attribute	Description
Applies To	Apply the pricing charge definition to a price charge, return charge, or a shipping charge. Note that Pricing does not come predefined to process a return charge, such as a restocking fee, but you can use the Manage Returns Price Lists page to configure a returns price list.
Price Type	Specify whether the charge that Pricing associates with an item is One Time or Recurring. Use Recurring for a charge that recurs, such as a subscription.
Charge Type	Specify the type of charge that Pricing associates with an item. For example: o **Sale.** For a tangible item, such as a computer monitor. o **Service.** For a service, such as performing service on a computer monitor. o **Freight.** For freight charges, such as the charges incurred to ship an item.
Charge Subtype	Provide details about the charge, such as whether the charge is a Price or a Fee. For example, a service charge might include an installation charge and a delivery fee.
Price Periodicity UOM Class	Specify the time period when Pricing applies a recurring charge. For example, Weekly or Monthly.
Tax Charge Type	Specify how to use this pricing charge definition for tax purposes, such as Commercial discount, Freight charge, Insurance charge, Miscellaneous charge, or Packing charge.

Attribute	Description
Refundable	Add a check mark to allow Pricing to refund the charges that this pricing charge definition references.
Setup Enabled	Add a check mark to associate the pricing charge definition with pricing entities. Note the following points: o If the Active option contains a check mark, and if the Setup Enabled option does not contain a check mark, then the pricing charge definition can use the pricing entities that it currently references, but you cannot associate other pricing entities with the pricing charge definition. o If you must disable a pricing charge definition but must not delete it because historical data continues to use it, then remove the check mark from Setup Enabled. Pricing will prevent you from assigning a pricing charge definition to a pricing entity in the Pricing Administration work area, but the pricing charge definition will remain active so that it can support records that contain historical data.
Active	Add a check mark to make the pricing charge definition available for use. You must make sure the Setup Enabled option and the Active option each contain a check mark so that Pricing can use the pricing charge definition at run time.
Calculate Margin	Add a check mark to calculate the profit margin for the pricing charge definition.

Related Topics

- Managing Price Lists: Procedure
- Managing Cost Lists: Procedure
- Oracle Fusion Pricing: Overview

Managing Price Elements: Procedure

A price element is a pricing entity that a pricing algorithm uses to capture the different types of prices, costs, adjustments, taxes, or profit margins that it requires to create a price breakdown or pricing analytic.

You can use a price element to capture different price points in a price calculation. Base list price, tier adjustment, list price, discount adjustment, net price, and cost of goods sold are each an example of a price point.

Pricing calculates the value for each price element when it runs the pricing algorithm. For example, list price is an example of a price element. It might calculate the value of the list price for the AS54888 Desktop Computer at $2,500. For details, see Pricing Architecture: How It Works.

Manage price elements:

1. Log into Order Management with setup privileges, such as ORDER_MGR_OPERATIONS.
2. In the Navigator, click **Setup and Maintenance**.
3. On the Setup and Maintenance page, click **Order Management**, and then click **Setup**.
4. On the Setup page, search for, and then open Manage Price Elements.
5. On the Manage Price Elements page, in the Search area, set Active to **Yes**, and then click **Search**.
6. Examine the price elements that come predefined with Pricing.

To reduce maintenance, it is recommended that you use a predefined price element instead of creating a new one.

7. If you cannot locate a price element that meets your requirements, then click **Actions**, click **Add Row**, and then set the following attributes.

Attribute	Description
Element Code	Enter a unique code that identifies the price element. This code makes sure you do not create a duplicate price element that might result in a conflict error.
Element Name	Enter a name. Pricing displays this name in the price breakdown and in the Pricing Administration work area. You can modify the name of a predefined price element.
Type	Choose a type, such as Price or Cost.
Active	Add a check mark. Pricing only uses pricing elements that are active. If a pricing entity: o **Does not reference the price element.** You can remove the check mark to remove the price element from calculations, but to keep it for possible later use. o **References the price element.** You cannot remove the check mark.

Related Topics

- Pricing Algorithms: Explained
- Managing Price Lists: Procedure
- Managing Cost Lists: Procedure

Managing Pricing Bases: Procedure

You can specify the pricing basis that Oracle Fusion Pricing uses to calculate an adjustment. It references a price element, such as List Price or Invoice Price, to calculate the discount that it applies on an item. The price element is one of the components on the pricing charge.

You can manage the following types of pricing bases:

Type of Pricing Basis	Description
Adjustment Basis	Adjust the price according to a percent. Note the following points: • For example, you can create an adjustment basis that applies a 20% discount on the list price of a network of desktop computers. For another example, apply a 10% discount on the installation charge for a network of desktop computers. • You can define the adjustment on the list price, base price, or net price, resulting in different invoice values for the network of computers.

Type of Pricing Basis	Description
Tier Basis	Adjust the price according to an amount. Note the following points: • A tier basis aggregates price for a single pricing charge or a set of pricing charges. For example, if a one-time sale charge is greater than $2,000, then apply a 10% discount on the base price. For another example, determine the one-time sale charges for the QP LIST PRICE charge component. • The tier basis contains the details of the pricing charges and the charge components that Pricing uses to calculate the adjustment. It references the price type, charge type, charge subtype, and price periodicity. This information is important when multiple charges exist for an item. • You can include or exclude charges. For example, assume a third-party contractor installs the item you sell, so you do not want to offer a discount on the installation. You can create a pricing basis that includes only the one-time sale charge and a monthly recurring service charge, but that excludes the one-time installation charge. • You can specify whether or not the tier basis applies to each order line or to the entire sales order. • To calculate the tier basis at run time, Pricing aggregates the charges that match the criteria you define.

For the example in this topic, assume you must add a tier basis for the sale, installation, and monthly service for a network of desktop computers. Assume you must apply this tier basis on the following charges:

- A one time charge on the list price of the sale
- A one time charge on the list price of the installation fee
- A recurring charge on the list price of the monthly service fee

Assume you sell to a distributor who ships the item and handles the freight and shipping charges, so you must exclude freight charges from your pricing basis.

This topic includes example values. You might use different values, depending on your business requirements.

Manage a pricing basis:

1. Log into Order Management with setup privileges, such as ORDER_MGR_OPERATIONS.
2. In the Navigator, click **Setup and Maintenance**.
3. On the Setup and Maintenance page, click **Order Management**, and then click **Setup**.
4. On the Setup page, search for, and then open Manage Pricing Bases.
5. On the Manage Pricing Bases page, in the Search area, set Active to **Yes**, and then click **Search**.
6. Examine the pricing bases that come predefined with Pricing.

   To reduce maintenance, it is recommended that you use a predefined pricing basis instead of creating a new one.
7. If you cannot locate a pricing basis that meets your requirements, then click **Actions**, and then click **Create**.
8. On the Create Pricing Basis page, set the following attributes.

Attribute	Value
Usage	Tier Basis
Price Element	List Price
Price Type	One Time
Charge Type	Sale

Attribute	Value
Charge Subtype	Price
Active	Contains a check mark

9. Click **Add Charge Criteria**.
10. In the Criteria for Included Charges area, notice that the Create Pricing Basis page already added a row that includes the criteria that you specified in step 6.
11. Add the criteria for the installation fee. In the Criteria for Included Charges area, click **Actions**, click **Add Row**, and then set the following values.

Attribute	Value
Price Type	One Time
Charge Type	Sale
Charge Subtype	Fee

12. Add the criteria for the monthly service fee. In the Criteria for Included Charges area, click **Actions**, click **Add Row**, and then set the following values.

Attribute	Value
Price Type	Recurring
Charge Type	Service
Charge Subtype	Fee
Price Periodicity	Month Note the Pricing gets the values that it displays for Price Periodicity from the UOM class that you define in the pricing charge definition. If you do not define this UOM class, then Pricing gets these values from the Default Pricing Periodicity UOM class. For details, see Managing Pricing Charge Definitions: Procedure.

13. Add the criteria for the excluded charges. In the Criteria for Excluded Charges area, click **Actions**, click **Add Row**, and then set the following values.

Attribute	Value
Price Type	One Time
Charge Type	Freight
Charge Subtype	All

Attribute	Value

14. Click **Save**.
15. Reference your pricing basis from a pricing rule that you create in the Pricing Administration work area.

    For details, see Adding Tiers to Pricing Rules: Procedure.

Related Topics

- Adding Tiers to Pricing Rules: Procedure
- Oracle Fusion Pricing: Overview
- Pricing Rules: Explained

Managing Pricing Parameters: Procedure

A pricing parameter allows you to manage behavior that applies across the Pricing Administration work area.

Each pricing parameter comes predefined with Oracle Fusion Pricing. You cannot create or delete a pricing parameter, but you can modify a parameter value.

Manage pricing parameters:

1. Log into Order Management with setup privileges, such as ORDER_MGR_OPERATIONS.
2. In the Navigator, click **Setup and Maintenance**.
3. On the Setup and Maintenance page, click **Order Management**, and then click **Setup**.
4. On the Setup page, search for, and then open Manage Pricing Parameters.
5. On the Manage Pricing Parameters page, modify the following parameters, as necessary.

Pricing Parameter	Description
Default Price Periodicity UOM Class	Set the default value that Pricing displays in the Pricing Administration work area for the price periodicity attribute. Pricing uses this value for each recurring charge or usage charge for this attribute. For example, you can set the default value to Weekly, Monthly, or Per Quarter. If you set it to Weekly, then Pricing displays Weekly as the default value for price periodicity when you create a pricing entity, such as a price list, in the Pricing Administration work area. For details about how you set price periodicity, see Managing Pricing Charge Definitions: Procedure.
Item Validation Organization	Specify the item validation organization that Pricing uses for each business unit when it validates an item. Note the following points: o Pricing filters the items that it displays according to the item validation organization that you specify. For example, if you specify Vision Operations as the business unit, and V1 as the Organization, then Pricing only displays items that are part of the V1 organization when you create a pricing entity in the Pricing Administration work area. o Product Information Manager associates each inventory organization with a business unit, and it determines the values that you can choose for the organization. For details about how to set up Product Information Manager, see the guide titled Oracle SCM Cloud, Implementing Common Features for Oracle SCM Cloud.

Pricing Parameter	Description
	○ If you do not define an item validation organization, then you cannot view items in the Pricing Administration work area.
Product Catalogs	Choose the product catalog that Pricing uses to calculate the price, adjustments, and costs for each item according to a product catalog. Note that Pricing does not support product catalogs in the current release.

6. Click **Save**.

Related Topics

- Oracle Fusion Pricing: Overview
- Pricing Rules: Explained
- Managing Price Lists: Procedure

Managing Rounding Rules: Procedure

You can use a rounding rule to replace a value with some other value that is shorter, simpler, or more explicit.

You can apply a rounding rule to a price to make sure that you apply rounding consistency across pricing algorithms. You can create a complex rounding rule. For example, you can create the following rounding rules to meet the needs of a local cultural preference, or that your company policy requires:

- Round each price to 0.97 or 0.99 for companies that reside in the United States, and round each price to 88 for companies that reside in China.
- Round each price that includes a value:
  - Between 1 and 100 to a precision of 4
  - Between 100.001 and 10000 to a precision of 2
  - Greater than 10000.01 to a precision of 0

Summary of the Work

To manage a rounding rule, do the following work:

1. Create a rounding rule.
2. Assign the rounding rule to a currency.

This topic includes example values. You might use different values, depending on your business requirements.

Create a Rounding Rule

Create a rounding rule:

1. Log into Order Management with setup privileges, such as ORDER_MGR_OPERATIONS.
2. In the Navigator, click **Setup and Maintenance**.
3. On the Setup and Maintenance page, click **Order Management**, and then click **Setup**.
4. On the Setup page, search for, and then open Manage Rounding Rules.

5. On the Manage Rounding Rules page, in the Name attribute, enter **%**, and then click **Search**.
   The Manage Rounding Rules page displays the predefined rounding rules.
6. Examine the predefined rounding rules.
   To reduce maintenance, it is recommended that you use a predefined rounding rule instead of creating a new one.
7. If you cannot locate a rounding rule that meets your requirements, then click **Actions**, click **Add Row**, and then set the following values.

Attribute	Description
Name	Enter text that Pricing can use to reference this rounding rule. It is recommended that you use the following style: o Enter alphanumeric text. o Use headline capitalization. o Use an underscore to separate each word.
Type	For details, see Rounding Rule Types: Explained.
Round To	For details, see Rounding Rule Types: Explained.
Direction	Set to one of the following values: o **Up.** Round values up. o **Down.** Round values down. o **Standard.** Round values according to a standard. Standard makes sure Pricing performs mathematical, half up rounding, such as rounding $1.75 up to $2.
Incremental Value	For details, see Rounding Rule Types: Explained.
Setup Enabled	Do one of the following: o **Add a check mark.** Make this rounding rule available at run time. o **Remove the check mark.** Make this rounding rule available at run time, but prevent a user from assigning a currency to it on the Manage Rounding Rule Assignments page. This feature is useful when you must discontinue usage of a rounding rule but cannot delete it because historical data still uses it.
Active	Add a check mark to make this rounding rule available at run time.

8. Click **Save and Close**.

Assign the Rounding Rule to a Currency

As an option, you can assign the rounding rule to a currency. If your business uses multiple currencies, then you can specify the currency that the rounding rule affects. This feature allows you to create multiple rounding rules, and then assign a different currency to each of them.

Assign the rounding rule to a currency:

1. On the Setup page, search for, and then open Manage Rounding Rule Assignments.

2. On the Manage Rounding Rule Assignments page, click **Actions**, click **Add Row**, and then set the following values.

Attribute	Description
Currency	Choose the currency that you must assign to this rounding rule.
Rounding Rule	Choose the rounding rule that you created earlier in this topic. At run time, Pricing will apply this rounding rule only to an item that uses the currency that you set in the Currency attribute.

3. Verify your work.

Related Topics

- Oracle Fusion Pricing: Overview
- Pricing Algorithms: Explained

Rounding Rule Types: Explained

You can create different types of rounding rules.

You can create the following types of rounding rules:

- Round to precision
- Round to nearest
- Round to the nearest multiple
- Round to range

Round to Precision

Consider the following examples that use **round to precision**, where Round To specifies to round according to a decimal place value:

Price	Round To	Direction	Rounded Value
$15.75	0	Up	$16.00
$15.75	0	Down	$15.00
$15.75	0	Standard	$16.00
$187.5	-1	Standard	Rounds the ten place value to 187.5
$187.5	0	Standard	Rounds the one place value to 187

Price	Round To	Direction	Rounded Value
$187.5	1	Standard	Rounds the ten place value to 190
$187.5	2	Standard	Rounds the hundred place value to 200

Round to Nearest

Consider the following examples that use **round to nearest**, where Round To specifies the value to use when rounding:

Price	Round To	Direction	Incremental Value	Rounded Value
$0.22	.05	Up	0.10	$0.25
$0.22	.05	Down	0.10	$0.15
$0.22	.05	Standard	0.10	$0.25

Note that Pricing adds the Increment Value according to the value that you set for Round To. You can also manually modify the Increment Value. You can specify an increment of a whole, a tenth, a hundredth, or a whole multiple of a decimal, such as 0.5 or 0.25.

Round to the Nearest Multiple

Consider the following examples that use **round to the nearest multiple** to round to the nearest multiple of the Round To value. For example, if you set Round To to 5, then the multiples of Round To are 5, 10, 15, 20, and so on. Note that the Standard direction rounds down to the nearest value.

Price	Round To	Direction	Rounded Value
$15.75	5	Up	$20.00
$15.75	5	Down	$15.00
$15.75	5	Standard	$15.00

Round to Range

Consider the following examples that use **round to range** to round to a range of values that you specify.

Price	Round Value	Rounding Rule Type	Rounded Value	Direction	Increment Value
$0	100	Round to nearest	0.99	Standard	1

Price	Round Value	Rounding Rule Type	Rounded Value	Direction	Increment Value
$100	10,000	Round to nearest	9	Standard	10
$10,000	10,500	Round to value	10,500	Standard	

You can identify multiple ranges and define a separate rounding rule for each of these ranges. You can use the following round rule types:

- **Round to precision.** Round to a precision.
- **Round to nearest.** Round to the nearest value.
- **Round to the nearest multiple.** Round to the nearest multiple of the value.
- **Round to value.** Round to a fixed value.

You can set only one rounding rule for each range of values.

Performing Various Administrative Work

Importing Price Lists: Procedure

You can use the Price List Import Template to import price lists into Oracle Fusion Pricing. This template contains a structure that the Oracle database requires. It includes a tab for each database table, and it displays these tabs in a specific sequence. It includes columns on each tab that represent the table columns that Oracle requires, and it specifies the data type that Oracle requires for each database column.

Summary of the Work

To import price lists, do the following work:

1. Prepare your price list.
2. Create the import file.
3. Upload your price list.
4. Import your price list.

Note that you can use this procedure to create a price list that includes child objects. You can also use the Pricing Administration work area to create a price list, but you must manually add each child object.

Prepare Your Price List

You must convert your price list into into a CSV (comma separate values) file that uses the same structure that the Price List Import Template uses. Using this template helps to make sure that your converted price list uses the same structure that the Oracle database requires. This topic describes one recommended way to convert your price list. The details of your conversion might require a different way. If you cannot use the Price List Import Template for some reason, then it is recommended that you consult Oracle resources about how to use an open interface when importing data.

Convert your price list into a CSV file:

1. Download the Price List Import Template from the Import Price List topic in the File-Based Data Import for Oracle Supply Chain Management Cloud guide on Oracle Help Center at http://docs-uat.us.oracle.com/cloud/latest/scmcs_gs/OEFSC/Import_Price_List_433315_fbdi_15.htm#433315.

2. Use a spreadsheet editor that can read a CSV file, such as Excel, to open the Price List Import Template, and then familiarize yourself with the structure that it uses.
3. Use a data manipulation tool to structure your price list so that it mirrors the structure that the Price List Import Template contains, and then save this data to a CSV file.

   You can use SQL (Structured Query Language), ODI (Oracle Data Integrator), or some other tool to convert your price list into a CSV file.

Guidelines for Converting Your Price List Into a CSV File

You must create a CSV file that includes data for interface tables and columns when you do the conversion. Do the following work to make sure the structure that this CSV file contains mirrors the structure that the Price List Import Template contains:

- Include the same table names and column names in your CSV file that the templates uses.
- Sequence the tables in your CSV file in the same sequential order that the templates uses. The tab sequence that the template uses determines this sequential order.
- Include the same columns in each table in your CSV file that the templates uses, and arrange these columns in the same sequential order inside each table.
- Use the same data type for each column.
- Include data for all required columns. The Price List Import Template uses an asterisk (*) to indicate required columns. For example, the Calculation Method column on the PRICE_LIST_CHARGES_INT tab is required. Note that some columns might be required depending on conditions that apply to your usage.

  The Price List Import Template uses double asterisks (**) to indicate a set of required columns. You must include a value for at least one column in each set. For example, the template uses double asterisks with UOM Code and UOM Name to indicate that they constitute one set. You must include a value for at least one of these columns.

To view an example of this CSV structure, do the following work:

1. Open the Price List Import Template in Microsoft Excel.
2. Click the **PRICE_LISTS_INT** tab.
3. Choose **File**, **Save As**, and then click **Excel Workbook**.
4. Save the file as a .csv file, and then use a text editor to examine the output.

Create the Import File

Create the import file:

1. Prepare the Price List Import Template.
   - Use a spreadsheet editor that can read a CSV file, such as Excel, to open the Price List Import Template.
   - Delete the example data from the Price List Import Template. This template comes with example data that helps you determine the type of data that you must include. For example, row five of the PRICE_LISTS_INT tab includes example data. Make sure you delete all example data from all tables in the spreadsheet, even from tables that you do not require.
2. Copy and paste your price list into each of the tables in the Price List Import Template:
   - Use a spreadsheet editor to open the CSV file that contains your price list.
   - Copy your line data to the clipboard.
   - In the Price List Import Template, click the **PRICE_LISTS_INT** tab.
   - Click cell **A5**, and then paste your data.
   - Examine the results to make sure you correctly pasted the data. For example, make sure the Name column contains VARCHAR data, and that the Source Price List ID column contains NUMBER data.

- Continue copying data for each table until you finish copying all your price list into the Price List Import Template.
- Do not modify the tab sequence in the template or the column sequence on each worksheet. Modifying the template in this way will cause errors.
- Do not delete any tabs.

It is recommended that you save your work after each copy.

3. Create the import file:
   - Click the **Create CSV** tab, and then click **Generate CSV File**.

     If the Generate CSV File button is not active, then click **Developer** in the menu bar, and then click **Macros**. In the Macro dialog, choose **GenCSV**, and then click **Run**.
   - Wait for the macro in Excel to finish running.

     When the macro finishes running, Excel displays a dialog that allows you to save a .zip file.
   - In the save dialog, choose a location to save your .zip file, and then click **Save**.

     The macro creates a .zip file that includes a separate file for each table that the template contains.

Upload Your Price List

Upload your price list:

1. Log into Pricing Administration. You must use the Import Price List privilege or the Improved Approved Price List privilege when you log in.
2. In the Navigator, under Tools, click **Scheduled Processes**.
3. On the Scheduled Process page, click **Schedule New Process**.
4. In the Schedule New Process dialog, set the following field, and then click **OK**.

Field	Value
Name	Load Interface File for Import

5. In the Process Details dialog, set the following parameters.

Parameter	Description
Import Process	Choose Import Price List.
Data File	Do the following work: a. Click the **down arrow** in the Data File field. b. Scroll down, and then click **Upload a New File**. c. In the Upload File dialog, click **Choose File.** d. In your Windows Explorer window, locate and choose the .zip file that you created when you used the Price List Import Template, and then click **Open**. e. In the Upload file dialog, click **OK.** f. In the Process Details dialog, make sure the Data File field displays the name of the .zip before you continue.

6. Click **Submit**.
7. In the Confirmation dialog, note the value of the Process ID, click **OK**, and then click **Close**.

8. Click **Actions**, and then click **Refresh**.
9. Use the Process ID that you noted earlier to locate your scheduled process, and then make sure the Status field for this process displays Succeeded.

   The Succeeded status indicates that the scheduled process successfully uploaded all of your price list. If the upload fails on any row, then the status displays Error. If the Search Results list does not display your process, then click **Refresh** until it does.
10. Correct errors, if necessary:

    - If the scheduled process ends in an error, then click the **Error** status in the Search Results list for your scheduled process, and then examine the log and output files to get details about the data that caused the error.
    - Use Excel to open the Price List Import Template that contains your price list, and then correct the price list that is causing the error.
    - In the Price List Import Template, click **Generate CSV File**, and then run the scheduled process again.

    Repeat this step until the scheduled process successfully uploads all of your price list.

Import Your Price List

Import your price list:

1. Run the Import Price List scheduled process. In the Process Details dialog, set one of the following parameters.

Parameter	Description
Price List Name	Enter the name of the price list.
Import Request ID	Enter the identification number that you noted in step 8 of the Upload Your Price List section of this topic.
Commit Point	Accept the default value of 100, or enter an integer that sets the maximum number of records to import at one time. For example, if Commit Point is 100, then the import will import 100 records at a time.
Number of Child Processes	Enter an integer that sets the maximum number of child processes to run during the import. If the number of records to import is: - **Less than one hundred.** The import runs two child processes, by default. - **More than one hundred.** The import runs four child processes, by default.

2. Make sure the Status for the Import Price List scheduled process that you submitted is Succeeded.

   The Succeeded status indicates that the scheduled process successfully imported all of your price list. If the import fails on any row, then the status displays Error.
3. Verify your import:

   - Log in to Oracle Fusion Pricing with the Pricing Manager job role, and then, in the Navigator, click **Pricing Administration**.
   - On the Overview page, click **Tasks**, and then click **Manage Price Lists**.
   - Search for the price list that you imported.

- Verify that the Manage Price Lists page displays the price lists that you imported.

Interface Tables That the Price List Import Template Uses

The Price List Import Template includes a tab for each of the following interface tables.

Table Name	Information That This Table Must Contain
QP_ PRICE_ LISTS_INT	Price list header data.
QP_ PRICE_ LIST_SETS_INT	Access set data.
QP_ PRICE_ LIST_ ITEMS_INT	Item line data.
QP_ PRICE_ LIST_ CHARGES_INT	Pricing charges defined for the item.
QP_ TIER_ HEADERS_INT	Tier header defined for the charge.
QP_ TIER_ LINES_INT	Tier lines defined for the tier header.
QP_ PL_ COMP_ ITEMS_INT	Component item line data.
QP_ MATRIX_ DIMENSIONS_ INT	Attribute matrix defined for the charge.
QP_ MATRIX_ RULES_INT	Attribute matrix rules defined for the matrix.

Troubleshooting Price List Import

Perform the following steps until you resolve the problem:

1. Click the job for the scheduled process that you ran earlier in this topic, open the attachments in the details section, and then examine the following log files.

Log File	Description
.txt files created for the Import Price List Header job, the Access Set, or the Import Price List Items job.	Describes the error.
.log files created for the Import a Price List job or the Import Price List job.	Describes the status of the child jobs.

2. Make sure the status of the Load Interface file for the import job is Succeeded and is not in a Warning or Error state.
3. Make sure you correctly set the parameters when you run the Import Price List job.
4. Examine the server logs and the Enterprise Manager logs.

   If the scheduled process does not create the .txt file for the job, then a problem might exist with the database or some unknown exception might have occurred. It is recommended that you examine the server logs or the Enterprise Manager logs for the job that does not create a .txt file.

5. Examine the interface tables.

Examine the Enterprise Manager Logs

Do the following work:

1. Log into Enterprise Manager.
2. In the Oracle Fusion Supply Chain Management tree, expand **Farm_SCMDomain**, and then expand **Scheduling Services**.
3. Right-click **ESSAPP**, click **Job Request**, and then click **Search Job Request**.
4. In the Request Search area, enter the following details, and then click **Search**.

Field	Description
Request ID	Enter the job Id.

5. In the Request Details area, examine the results, click **Action**, click **Request Log**, and then examine the error log that displays.
6. Correct the problem that the error log describes.

Examine the Interface Tables

Do the following work:

1. Get administrative access so that you can query the Oracle database.
2. Query the interface tables, and then examine the following status.

Status	Description
NEW	Not processed.
ERROR	Processed but includes a data error.
VALIDATED	Processed but not imported because one or more children contain an error.
IMPORTED	Successfully imported.

For details about these tables, see the Interface Tables That the Price List Import Template Uses section in this topic.

3. Examine the IMPORT_STATUS_CODE column of the QP_PRICE_LISTS_INT table. This column describes the overall status of the price list. It includes the following values.

Status	Description
COMPLETED	The scheduled process imported the price list and each child entity.
PARTIAL	The scheduled process imported only part of the price list.

Pricing uses the following hierarchy. You can use the status of each item in this hierarchy to help isolate where the error occurs:

```
Price List Header
```

```
Item
Component Item
Charge
Charge
Tier
Tier Header
Tier Line
Matrix
Matrix Dimension
Matrix Rules
```

For example, Item is a child of the Price List Header, Component Item is a child of Item, and Charge is a child of Component Item.

Pricing processes each child entity only if the parent is valid. If the parent:

- **Does not fail validation.** If a child errors, then the status of the parent is VALIDATED and the child status is ERROR, VALIDATED, or NEW.
- **Fails validation.** The parent status is ERROR and the status for each child is NEW.

For example, if a charge error occurs, then the hierarchy will contain the following values:

```
Price List Header, IMPORTED
 Item, VALIDATED
 Component item
 Charge
 Charge
 Tier, NEW
 Tier Header
 Tier Line
 Matrix, NEW
 Matrix Dimension
 Matrix Rules
```

For another example, if a tier header error occurs, then the hierarchy will contain the following values:

```
Price List Header, IMPORTED
 Item, VALIDATED
 Component item
 Charge
 Charge, VALIDATED
 Tier
 Tier Header
 Tier Line, NEW
 Matrix, VALIDATED
 Matrix Dimension
 Matrix Rules
```

Related Topics

- Managing Price Lists: Procedure

Managing Multiple Currencies: Procedure

You can administer pricing to allow the user to choose from more than one currency in a single sales order.

For the example in this topic, you configure Pricing to allow your users to order the AS5488 desktop computer from Computer Service and Rentals in the USD currency or Yen currency.

Summary of the Work

To manage multiple currencies, do the following work:

1. Examine the predefined behavior.
2. Create pricing strategies.
3. Assign pricing strategies to pricing segment.
4. Test your work.

This topic includes example values. You might use different values, depending on your business requirements.

Examine the Predefined Behavior

Examine the predefined behavior:

1. Log into Order Management.
2. Create a new sales order using the following values.

Attribute	value
Customer	Computer Service and Rentals
Item	AS54888

3. On the order header, click **Actions**, and then click **Edit Currency Details**.
4. On the Edit Currency Details dialog, click the down arrow for Order Currency, and notice that it includes only US Dollar.
5. Click **OK**, and then log out of Order Management.

Create Pricing Strategies

In this section, you create two different pricing strategies. One strategy will default to USD, and the other one will default to Yen.

Create pricing strategies:

1. Log in to Oracle Fusion Pricing with the Pricing Manager job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Pricing Strategy**.
3. Create a new pricing strategy, using the following values.

Attribute	Value
Name	Pricing Strategy for USD
Business Unit	Computer Service and Rentals
Default Currency	USD - US Dollar
Objective	Allow user to choose USD
Allow Currency Override	Contains a check mark.

4. Create another pricing strategy, using the following values.

Attribute	Value
Name	Pricing Strategy for Yen
Business Unit	Computer Service and Rentals
Default Currency	JPY- Yen
Objective	Allow user to choose Yen
Allow Currency Override	Contains a check mark.

Assign Pricing Strategies to Pricing Segment

In this section, you assign your new pricing strategies to a pricing segment.

Assign pricing strategies to pricing segment:

1. On the Overview page, click **Tasks**, and then click **Manage Pricing Strategy Assignments**.
2. Immediately below the page title, click **Actions**, click **Add Row**, and then set the following values.

Attribute	Value
Assignment Level	Header
Pricing Context	Sales
Transaction Type	Sales Orders
Start Date	Choose today's date.

3. Click **Save**.
4. Click **Create Assignment Matrix**.
5. In the Create Assignment Matrix dialog, add a **check mark** to each option, and then click **OK**.
6. In the Header-Sales-Sales order area, click **Actions**, click **Add Row**, and then set the following values.

Attribute	Value
Channel Method	Inside Sales
Pricing Segment	Corporate Segment
Transaction Type	Sales Order
Pricing Strategy	Pricing Strategy for USD

7. Click **Actions**, click **Add Row**, and then set the following values.

Attribute	Value
Channel Method	Inside Sales
Pricing Segment	Corporate Segment
Transaction Type	Sales Order
Pricing Strategy	Pricing Strategy for Yen

8. Click **Save and Close**.

Test Your Work

Test your work:

1. Log into Order Management.
2. Create a new sales order using the following values.

Attribute	value
Customer	Computer Service and Rentals
Item	AS54888

3. On the order header, click **Actions**, and then click **Edit Currency Details**.
4. On the Edit Currency Details dialog, click the down arrow for Order Currency, and verify that it allows you to choose US Dollar or Yen.

Related Topics

- Managing Pricing Strategies: Procedure
- Assigning Pricing Strategies: Procedure
- Profiles, Segments, and Strategies: How They Work Together

5 Managing User Interfaces

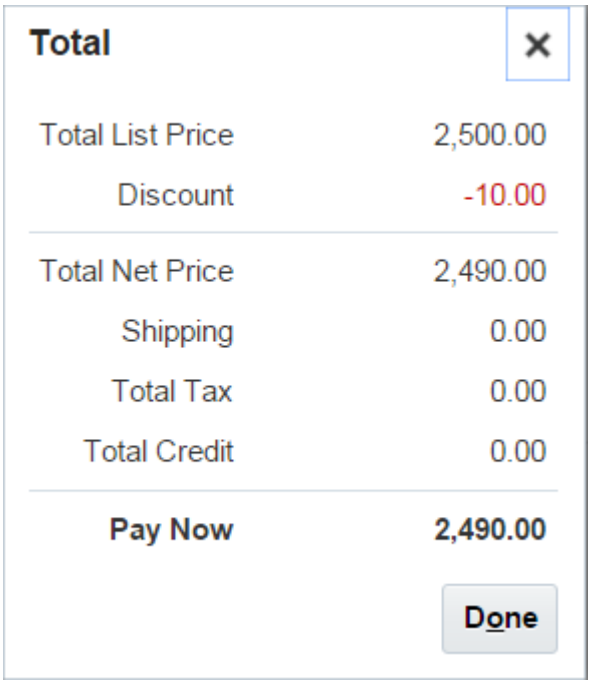
Managing Pricing Totals: Procedure

A pricing total is the sum of multiple charges. You can use it to combine and display the values of several charges as a single value.

Note the following points:

- Oracle Fusion Pricing uses a pricing algorithm named Calculate Sales Order Totals to calculate the totals that Order Management Cloud displays in the Total dialog when the order entry specialist creates a sales order.
- The Manage Pricing Totals page specifies the pricing totals to include in this dialog.
- Each of these pricing totals references a pricing algorithm that specifies the logic that the pricing algorithm uses to calculate each pricing total. For example, the predefined Total List Price pricing total references a pricing algorithm that adds up the extended amounts of each one-time price charge for every Buy line for the charge components where the price element equals LIST_PRICE. For details, see Pricing Architecture: How It Works.

For the example in this topic, assume Order Management displays the following values in the Total dialog:



Assume you must modify this Totals dialog in the following ways:

- Calculate total credit before you calculate total tax.
- Move the Total Tax line to immediately below Total Credit.
- Change the text Pay Now to Your Total Price.

You modify the pricing algorithm to change the calculation sequence and the sequence of lines in the dialog, and you use the Manage Pricing Totals page to modify the text.

This topic includes example values. You might use different values, depending on your business requirements.

Summary of the Work

To manage pricing totals, do the following work:

1. Examine the current behavior.
2. Modify the pricing algorithm.
3. Modify the pricing totals setup.
4. Test your work.

Examine the Current Behavior

Examine the current behavior:

1. Log in to Order Management with administrative privileges.
2. In the Navigator, click **Order Management**.
3. On the Overview page, click **Tasks**, and then click **Create Order**.
4. Complete attributes in the header.
5. In the Order Lines area, add an item. For this example, assume you add the following item:

Item	Your Price
AS54888, Desktop Computer	2,490

6. Click **2,490** next to Sale Price, and then examine the price details.
7. Click **2,490** next to Add, examine the price details in the Amount Sale Price dialog, and then click **Add**. For details about how to modify this dialog, see Managing Pricing Results Presentations: Procedure.
8. Click **2,490** next to Total at the top of the page, and then examine the price details in the Total dialog.

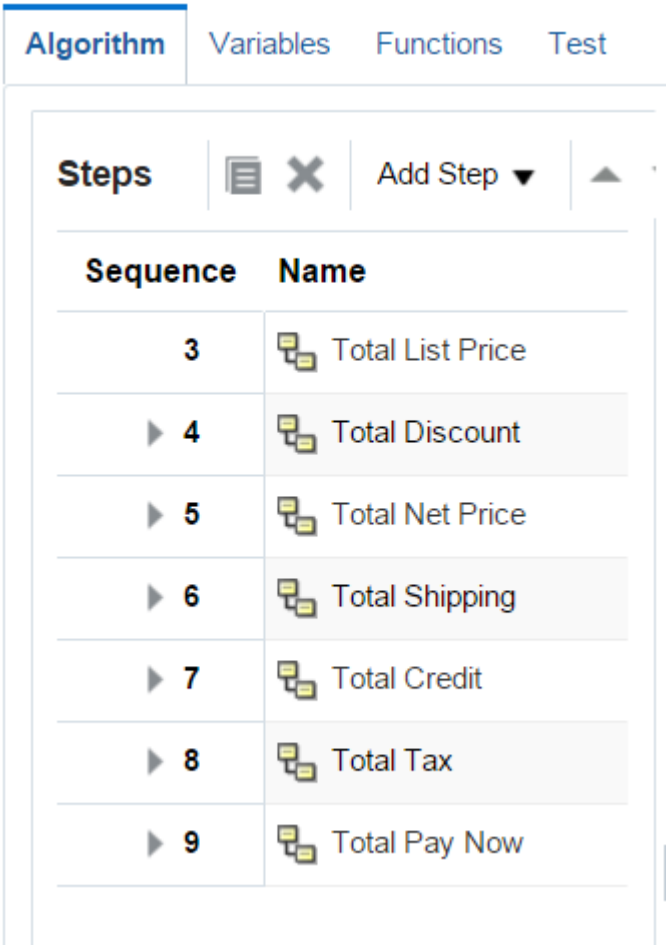
   For this example, assume Order Management displays the Total dialog included earlier in this topic.

Modify the Pricing Algorithm

Modify the pricing algorithm:

1. In the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Algorithms**.
3. On the Manage Algorithms page, click the Calculate Sales Order Totals **row**, click **Actions**, and then click **Create Version**.
4. Click **Calculate Sales Order Totals** in the row that includes In Progress in the Status column.

5. On the Edit Algorithm page, click the Total Credit **row**, click **Move Up**, and then verify that your modification resembles the following sequence:



6. Click **Save and Close**.
7. On the Manage Algorithms page, click the Calculate Sales Order Totals **row** that includes In Progress in the Status column, click **Actions**, and then click **Publish**.

Modify the Pricing Totals Setup

Modify the pricing totals setup:

1. Log into Order Management with setup privileges, such as ORDER_MGR_OPERATIONS.
2. In the Navigator, click **Setup and Maintenance**.
3. On the Setup and Maintenance page, click **Order Management**, and then click **Setup**.
4. On the Setup page, search for, and then open Manage Pricing Totals.
5. On the Manage Pricing Totals page, in the Search area, set Transaction Enabled to **Yes**, and then click **Search**.
6. Notice that the values in the Name column match the values that you observed in the Total dialog.
7. In the Name column, change the following value, and then click **Save and Close**

Old Value	New Value
Pay Now	Your Total Price

Test Your Work

Test your work:

1. In the Navigator, click **Order Management**.
2. On the Overview page, click **Tasks**, click **Create Order**, add the same item you added earlier, click **Add**, click **2,490** next to Total at the top of the page, and then verify that the Total dialog displays Total Credit immediately above Total Tax, and that it displays the Your Total Price text.

Related Topics

- Oracle Fusion Pricing: Overview
- Pricing Architecture: How It Works
- Pricing Algorithms: Explained
- Managing Price Elements: Procedure

Managing Pricing Results Presentations: Procedure

You use a pricing results presentation to specify how to display each price element in a price breakdown.

Oracle Fusion Pricing provides the information that Order Management Cloud displays in different price breakdowns, such as the breakdown in the Amount dialog for an order line, or the Total dialog of a sales order. A pricing results presentation determines the price element to display for each breakdown.

Summary of the Work

To manage a pricing results presentation, do the following work:

1. Examine the current behavior.
2. Manage a pricing results presentation.

For this example, assume you must display the rounding adjustment in the price breakdown that Order Management displays in the Amount Sale Price dialog.

This topic includes example values. You might use different values, depending on your business requirements.

Examine the Current Behavior

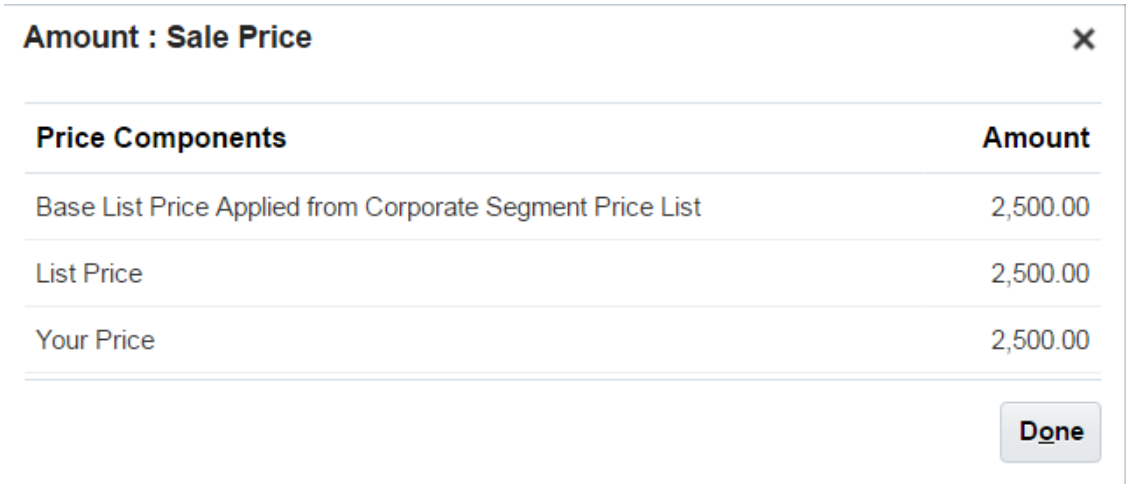
Examine the current behavior:

1. Log into Order Management with setup privileges, such as ORDER_MGR_OPERATIONS.
2. In the Navigator, click **Order Management**.
3. On the Overview page, click **Tasks**, and then click **Create Order**.
4. Complete attributes in the header.
5. In the Order Lines area, add an item. For this example, assume you add the following item:

Item	Your Price
AS54888, Desktop Computer	2,500

6. Click **2,500** next to Sale Price, and then examine the price details.
7. Click **2,500** next to Add, examine the price details in the Amount Sale Price dialog, and then click **Add**.

   Order Management displays the following dialog. Assume you must add a line that displays the rounding adjustment to this dialog.



8. Click **2,500** next to Total at the top of the page, and then examine the price details in the Total dialog.

   For details about how to modify this dialog, see Managing Pricing Totals: Procedure.

Manage a Pricing Results Presentation

Manage a pricing results presentation:

1. In the Navigator, click **Setup and Maintenance**.
2. On the Setup and Maintenance page, click **Order Management**, and then click **Setup**.
3. On the Setup page, search for, and then open Manage Pricing Results Presentations.
4. On the Manage Pricing Results Presentations page, in the Name attribute, enter **%**, and then click **Search**.

   The Manage Pricing Results Presentations page displays the predefined pricing results presentations.
5. Examine the pricing results presentations.

   To reduce maintenance, it is recommended that you use a predefined pricing results presentation instead of creating a new one.
6. Click the **row** that includes the pricing results presentation that Order Management uses for the Amount Sale Price dialog.
7. In the Selected Price Elements area, click **Actions**, and then click **Select and Add**.
8. In the Select and Add dialog, in the Name attribute, enter %, and then click **Search**.
9. Click the **row** that includes Rounding Adjustment in the Element Name column, and then click **OK**.
10. Click **Save**.

11. Test your work.

Related Topics

- Oracle Fusion Pricing: Overview
- Managing Price Elements: Procedure

Managing Pricing Messages: Procedure

You can use a pricing message that describes a price element.

For example, you can use a pricing message in the following ways:

- Describe a price element, such as Total List Price, Discount, Shipping, Total Tax, and so on, that Order Management Cloud displays in the Total dialog on the Create Order page.
- Describe the reason for a sale price violation. For example, Pricing displays the QP_FLOOR_PRICE_VIOLATION message when a cost element is less than the floor price.
- Describe how Oracle Fusion Pricing identifies the pricing segment or pricing strategy that it uses for a sales order.
- Describe other details, such as the name of an adjustment and the reason why Pricing applied it.

Summary of the Work

To manage a pricing message, do the following work:

1. Examine pricing message behavior.
2. Identify predefined tokens.
3. Create a pricing message.

In this example, you create a pricing message that Pricing displays for the Sentinel Desktop item in the Corporate price list. Pricing then uses the pricing rule to determine the token value, and then displays the message at run time.

This topic includes example values. You might use different values, depending on your business requirements.

Examine Pricing Message Behavior

Examine the message behavior that comes predefined with Pricing.

Identify Predefined Tokens

In most situations, you can probably use a predefined token. You must identify the token name so that you can reference it in you message. If you cannot find a predefined token that meets your requirements, then see Managing Pricing Message Tokens: Procedure.

Identify predefined tokens:

1. Log into Order Management with setup privileges, such as ORDER_MGR_OPERATIONS.
2. In the Navigator, click **Setup and Maintenance**.
3. On the Setup and Maintenance page, click **Order Management**, and then click **Setup**.
4. On the Setup page, search for, and then open Manage Pricing Message Token Attribute Definitions.
5. On the Manage Pricing Message Token Attribute Definitions page, choose the pricing entity where Pricing must display the message, and then click **Search**. For this example, set the following value:

Attribute	Value
Pricing Entity	Price List Items

6. In the Search Results area, click **Price List Message**.
7. On the Edit Pricing Message Token Attribute Definition page, click **Refresh Token Attributes**.
8. Scan the search results for the tokens that look like might meet your requirements, and then note the values in the Token Name column.

   For this example, you must display the name of the price list and the name of the item, so note the following token names:

   - PRICE_LIST_NAME
   - ITEM_NAME
9. Click **Cancel**, click **Done**, and then click **Done** again.
10. Click **Save and Close**.

Create a Pricing Message

Create a pricing message:

1. On the Setup page, search for, and then open Manage Pricing Messages.
2. On the Manage Pricing Messages page, choose the pricing entity where Pricing must display the message, and then click **Search**. For this example, set the following value:

Attribute	Value
Pricing Entity	Price List Items

3. Examine the predefined pricing messages.

   To reduce maintenance, it is recommended that you use a predefined pricing message instead of creating a new one.
4. If you cannot locate a pricing message that meets your requirements, then click **Actions**, click **Add Row**, and then set the following values.

Attribute	Description
Name	Enter text that Pricing can use to reference this pricing message. For this example, enter It is recommended that you use the following style: - Enter only alphabetic text. - Use all capital letters. - Use an underscore to separate each word.
Description	Enter text that describes the purpose of this pricing message. This description is intended only to help you administer and manage pricing messages. Pricing does not display it elsewhere.

Attribute	Description
Message Text	Enter the text that Pricing will display. Enclose each token name that you use with curly brackets. For this example, enter Item {ITEM_NAME} in price list {PRICE_ LIST_ NAME}is discontinued.
Pricing Entity	Choose the pricing entity where Pricing must display the message.

5. Click **Save**.
6. Modify the pricing rule so that it can determine the token value.

Related Topics

- Oracle Fusion Pricing: Overview

Managing Pricing Message Tokens: Procedure

You can define a token that specifies the attributes that Oracle Fusion Pricing uses to determine the token value for a pricing entity. You can then use this token in a pricing message. Oracle Fusion Pricing uses the token to get and display the token value at run time.

For example, assume you select the CurrencyCode attribute and the Price List pricing entity, and you use this attribute as a token in a pricing message. At run time, Pricing returns the value of the CurrencyCode attribute in the pricing message, and then displays it in the price breakdown.

In this example, you create a token that Pricing uses when it displays a message for the Sentinel Desktop item in the Corporate price list. You define Corporate and Sentinel Desktop each as a token value.

Manage pricing message tokens:

1. Log into Order Management with setup privileges, such as ORDER_MGR_OPERATIONS.
2. In the Navigator, click **Setup and Maintenance**.
3. On the Setup and Maintenance page, click **Order Management**, and then click **Setup**.
4. On the Setup page, search for, and then open Manage Pricing Message Token Attribute Definitions.
5. On the Manage Pricing Message Token Attribute Definitions page, in the Active attribute, click **Yes**, and then click **Search**.

   The Manage Pricing Messages page displays the predefined tokens.
6. Click **Detach**, and then examine the pricing message tokens.

   To reduce maintenance, it is recommended that you use a predefined pricing message token instead of creating a new one.
7. If you cannot locate a pricing message token that meets your requirements, then click **Actions**, click **Create**, and then set the following values.

Attribute	Description
Name	Enter text that Pricing can use to reference this pricing message token. It is recommended that you use the following style: o Enter only alphabetic text. o Use headline capitalization.

Attribute	Description
	For this example, enter **`Custom Price List Message`**.
Description	Enter text that describes the purpose of this pricing message. This description is intended only to help you administer and manage pricing messages. Pricing does not display it elsewhere. For this example, enter This definition contains custom tokens for prices.
Pricing Entity	For this example, choose Price List Items.
Active	Add a check mark.
Package Name	Enter oracle. apps. scm. pricing. setup. pricingMessages. publicModel. applicationModule. You must use this value for all tokens.
Application Module	Enter PricingMessageTokenAttrDefnAM. You must use this value for all tokens
Application Module Configuration	Enter PricingMessageTokenAttrDefnAMShared. You must use this value for all tokens.
View Object	Enter the name of the view object where Pricing must display this message. Use the following format: **`<entityName>MessageVO`** where: o **entityName**. Identifies the name of pricing entity that you set in the Pricing Entity attribute of this token. For this example, Pricing must display this message on a price list, so enter **`PriceListChargeMessageVO`**. You can use the following values, depending on how you set the Pricing Entity attribute: o CostListChargeMessageVO o ItemChargeGuidelineMessageVO o ManualChargeAdjustmentMessageVO
View Criteria	For this example, choose PriceListChargeMessageVC.

8. Click **Save and Edit**.
9. On the Edit Pricing Message Token Attribute Definition page, in the Pricing Message Token Attributes area, click **Refresh Token Attributes**.

Related Topics

- Oracle Fusion Pricing: Overview

Managing Pricing Lookups: Procedure

Oracle Fusion Pricing comes predefined with the lookups that it displays in the Pricing Administration work area and in some of the Pricing pages of the Setup and Maintenance work area. You cannot delete a predefined lookup, but you can customize some attributes of some lookups.

Summary of the Work

To manage pricing lookups, do the following work:

1. Examine the current behavior.
2. Modify a pricing lookup.
3. Test your work.

For this example, assume you must add a new value that allows you to specify a loss leader pricing strategy. You add this value to the Pricing Strategy Objectives lookup.

This topic includes example values. You might use different values, depending on your business requirements.

> **Caution:** It is recommended that you only modify a lookup when the modification is critical to meeting your business requirements. Most predefined lookups make sense in their predefined context. In most situations, it should not be necessary to modify them. If you must modify a predefined lookup, then you must make sure that you do not modify a lookup that affects Pricing logic. The example in this topic does not modify Pricing logic. It affects only your requirement to document how you use a pricing strategy. Some lookups are required. For example, the Customer Size attribute of a pricing profile is required. You can modify some of these lookups. If you are not certain whether or not modifying a lookup will affect Pricing logic, then you must consult with Oracle before you make the modification.

Examine the Current Behavior

Examine the current behavior:

1. Log in to Order Management with administrative privileges.
2. In the Navigator, click **Pricing Administration**.
3. On the Overview page, click **Tasks**, and then click **Manage Pricing Strategies**.
4. On the Manage Pricing Strategies page, click **Actions**, and then click **Create**.
5. On the Create Pricing Strategies dialog, click the **Objectives** attribute, and notice that it displays the following values:
    - Competitive pricing
    - Profit maximization
    - Revenue maximization
6. Click **Cancel**.

Modify a Pricing Lookup

Modify a pricing lookup:

1. Log into Order Management with setup privileges, such as ORDER_MGR_OPERATIONS.

2. In the Navigator, click **Setup and Maintenance**.
3. On the Setup and Maintenance page, click **Order Management**, and then click **Setup**.
4. On the Setup page, search for, and then open Manage Pricing Lookups.
5. On the Manage Standard Lookups APPLICATION QP page, in the Search area, set one or more attributes to filter the search results, and then click **Search**.

   For this example, set the following value.

Attribute	Value
Module	Pricing Administration

6. In the Search Results area, scan the Meaning column for a lookup that describes the attribute that you must modify.

   For this example, you modify the Pricing Strategy Objectives lookup.
7. Click the **row** that includes Pricing Strategy Objectives in the Meaning column.
8. In the ORA_QP_STRATEGY_OBJECTIVES area, click **Actions**, click **New**, and then set the following values.

Attribute	Value
Lookup Code	LOSS_LEADER
Display Sequence	4
Meaning	Loss leader
Description	Business objective to stimulate sales for other, more profitable items

9. Modify the values in the Display Sequence column so that it uses the following sequence:

Lookup Code	Display Sequence
LOSS_LEADER	1
ORA_ COMPETITIVE_ PRICING	2
ORA_ MAXIMIZE_ PROFIT	3
ORA_ MAXIMIZE_ REVENUE	4

10. Click **Save and Close**, and then click **Done**.

Test Your Work

Test your work:

1. In the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Pricing Strategies**.
3. On the Manage Pricing Strategies page, click **Actions**, and then click **Create**.

4. On the Create Pricing Strategies dialog, click the **Objectives** attribute, and verify that it displays the following values:
    - Loss leader
    - Competitive pricing
    - Profit maximization
    - Revenue maximization
5. Click **Cancel**.

Related Topics

- Oracle Fusion Pricing: Overview
- Managing Pricing Strategies: Procedure
- Lookups: Explained

Managing Pricing Descriptive Flexfields: Procedure

Oracle Fusion Pricing includes predefined descriptive flexfields that you can use to store custom information.

Summary of the Work

To manage pricing descriptive flexfields, do the following work:

1. Examine the current behavior.
2. Modify a descriptive flexfield.
3. Test your work.

For this example, assume you must add a custom field that allows you to describe details about the pricing strategy objective.

This topic includes example values. You might use different values, depending on your business requirements.

For details about flexfields, see Descriptive Flexfields: Explained.

Examine the Current Behavior

Examine the current behavior:

1. Log in to Order Management with administrative privileges.
2. In the Navigator, click **Pricing Administration**.
3. On the Overview page, click **Tasks**, and then click **Manage Pricing Strategies**.
4. On the Manage Pricing Strategies page, click **Actions**, and then click **Create**.
5. On the Create Pricing Strategies dialog, click the **Objectives** attribute, and notice the values that it displays.
6. Expand and contract the Additional Information area.
   Notice that this area is empty. You will add a text box that you can use to describe the pricing strategy objective.
7. Click **Cancel**.

Modify a Flexfield

Modify a flexfield:

1. Log into Order Management with setup privileges, such as ORDER_MGR_OPERATIONS.

2. In the Navigator, click **Setup and Maintenance**.
3. On the Setup and Maintenance page, click **Order Management**, and then click **Setup**.
4. On the Setup page, search for, and then open Manage Pricing Descriptive Flexfields.
5. On the Manage Pricing Descriptive Flexfields page, in the Search area, set one or more attributes to filter the search results, and then click **Search**.

   For this example, set the following value.

Attribute	Value
Module	Pricing Administration

6. In the Search Results area, scan the Name column for a flexfield that describes the pricing entity that you must modify.

   For this example, you modify the flexfield named Pricing Strategy Header DFF.
7. Click the **row** that includes Pricing Strategy Header DFF in the Name column, click **Actions**, and then click **Edit**.
8. On the Edit Descriptive Flexfield dialog, click **Actions**, and then click **Create**.
9. On the Create Segment dialog, set the following values.

Attribute	Value
Name	LOSS_LEADER
Data Type	Character
Value Set	150 Characters Optional
Prompt	Description of the business objective
Display Type	Text Box
Display Size	150
Display Height	4
Enabled	Contains a check mark
Range Type, Required	Does not contain a check mark
Instruction Help Text	Enter details that describe how you intend to meet the objective for this strategy

10. Click **Save and Close**, and then click **Save and Close** again.
11. On the Manage Pricing Descriptive Flexfields page, click the **row** that includes Pricing Strategy Header DFF in the Name column, and then click **Deploy Flexfield**.
12. On the dialog that displays, wait until the indicator reaches 100%, and then click **OK**.
13. On the Manage Pricing Descriptive Flexfields page, click **Done**.

Test Your Work

Test your work:

1. In the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Pricing Strategies**.
3. On the Manage Pricing Strategies page, click **Actions**, and then click **Create**.
4. Expand and contract the Additional Information area.

   Verify that this area includes the flexfield that you added, and that you can enter text.
5. Click **Cancel**.

Related Topics

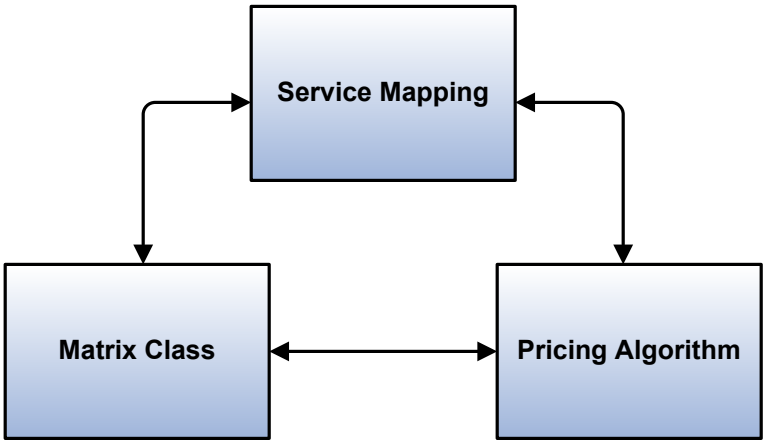
- Oracle Fusion Pricing: Overview
- Managing Pricing Strategies: Procedure
- Flexfields: Overview
- Descriptive Flexfields: Explained

6 Managing Pricing Algorithms, Service Mappings, and Matrix Classes

Pricing Architecture: How It Works

The pricing algorithm references a service mapping to price an item that it receives from an application, such as Order Management Cloud.

The following diagram illustrates how a service mapping, pricing algorithm, and a matrix class work together to price an item.

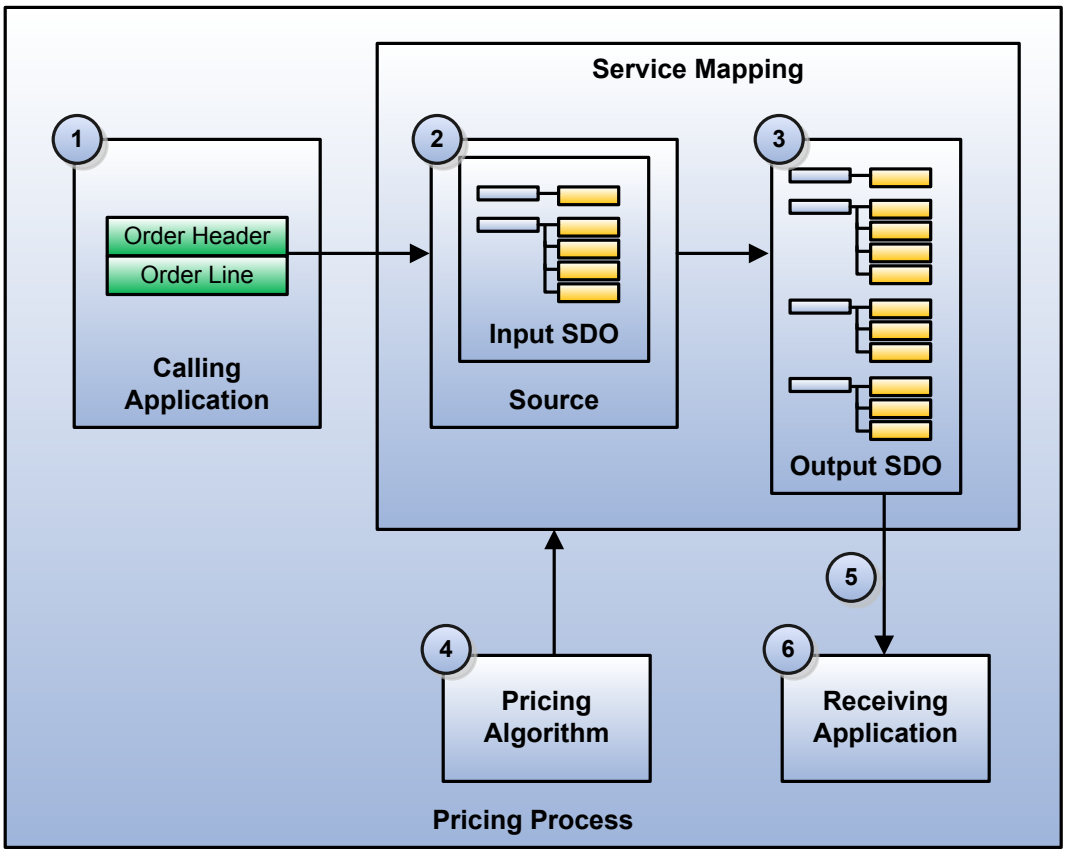


You can do the following:

- Use the pricing entities that you define in a service mapping to provide a source for the pricing algorithm.
- Use the pricing algorithm to transform the attribute values that it receives from the service mapping to output values.
- Choose attributes in the condition and results columns of a matrix class from the entity attributes that you define in the service mapping.

How Data Flows Through the Pricing Architecture

The following diagram illustrates how data flows through the pricing architecture. In this scenario, assume that Order Management is the calling application and the receiving application, and that it requires Pricing to price a sales order. Note that Pricing might use different services, sources, and algorithms for other scenarios.

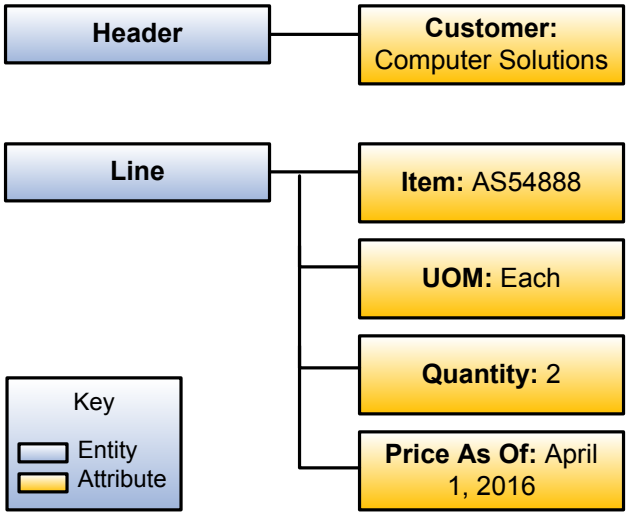


Explanation of Callouts

The pricing architecture includes the following steps:

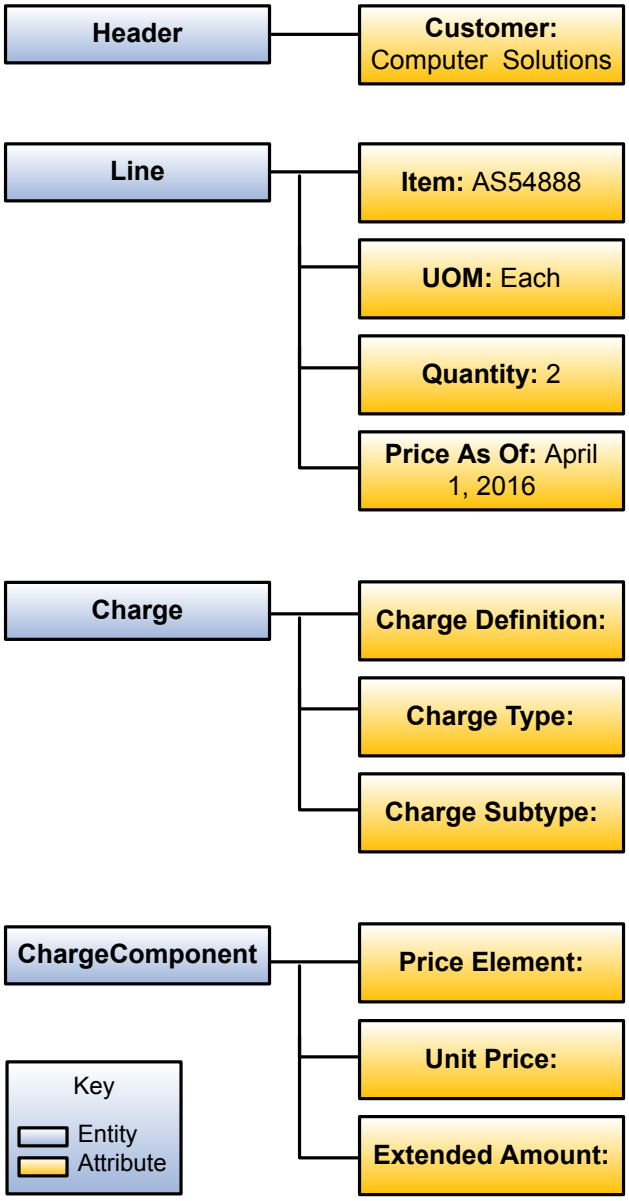
1. Order Management uses the predefined CalculateSalesOrderTotals service to send data for one sales order to Pricing.
2. The CalculateSalesOrderTotals service references the predefined Sales service mapping. This service mapping includes the OrderTotal source, and it uses this source to convert the data that Order Management sends into the following input service data object (SDO). The OrderTotal source specifies the entities and attributes that this

SDO contains and that the service will use as input to the pricing architecture. For example, The OrderTotal source specifies to use the Header entity and the Customer attribute.



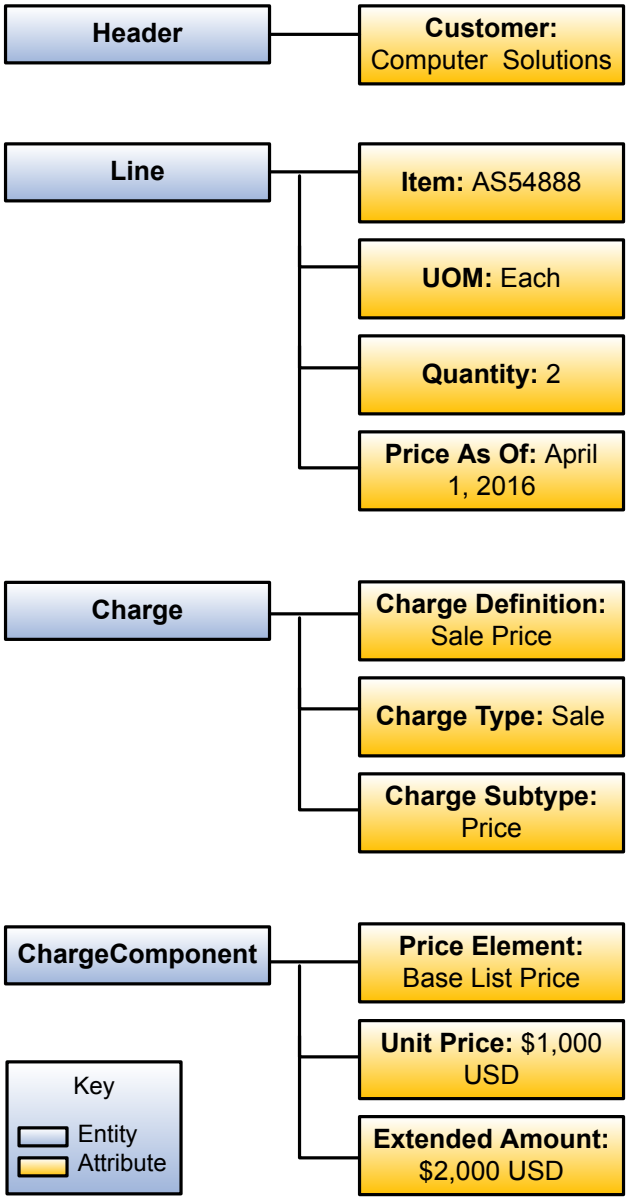
3. The Sales service mapping specifies sources, entities, and mappings between entities and attributes so that Pricing can create the structure for the output SDO that it will send to Order Management. It adds the Charge entity and the

ChargeComponent entity to the following output SDO, but does not add values for the attributes that these entities contain.



4. Pricing uses a pricing process assignment to identify the pricing algorithm to run, and then applies this pricing algorithm to the service mapping. In this example, Pricing applies each step of the predefined Price Sales Transaction pricing algorithm to the Sales service mapping. Each algorithm step uses data from the output SDO and conditionally updates it in memory at run time. In this example, the pricing algorithm adds values to the attributes

in the Charge entity and the ChargeComponent entity of the following output SDO. For example, it adds a value of $1,000 to the Unit Price attribute.



To calculate the values that it adds, the Price Sales Transaction pricing algorithm performs the following work:

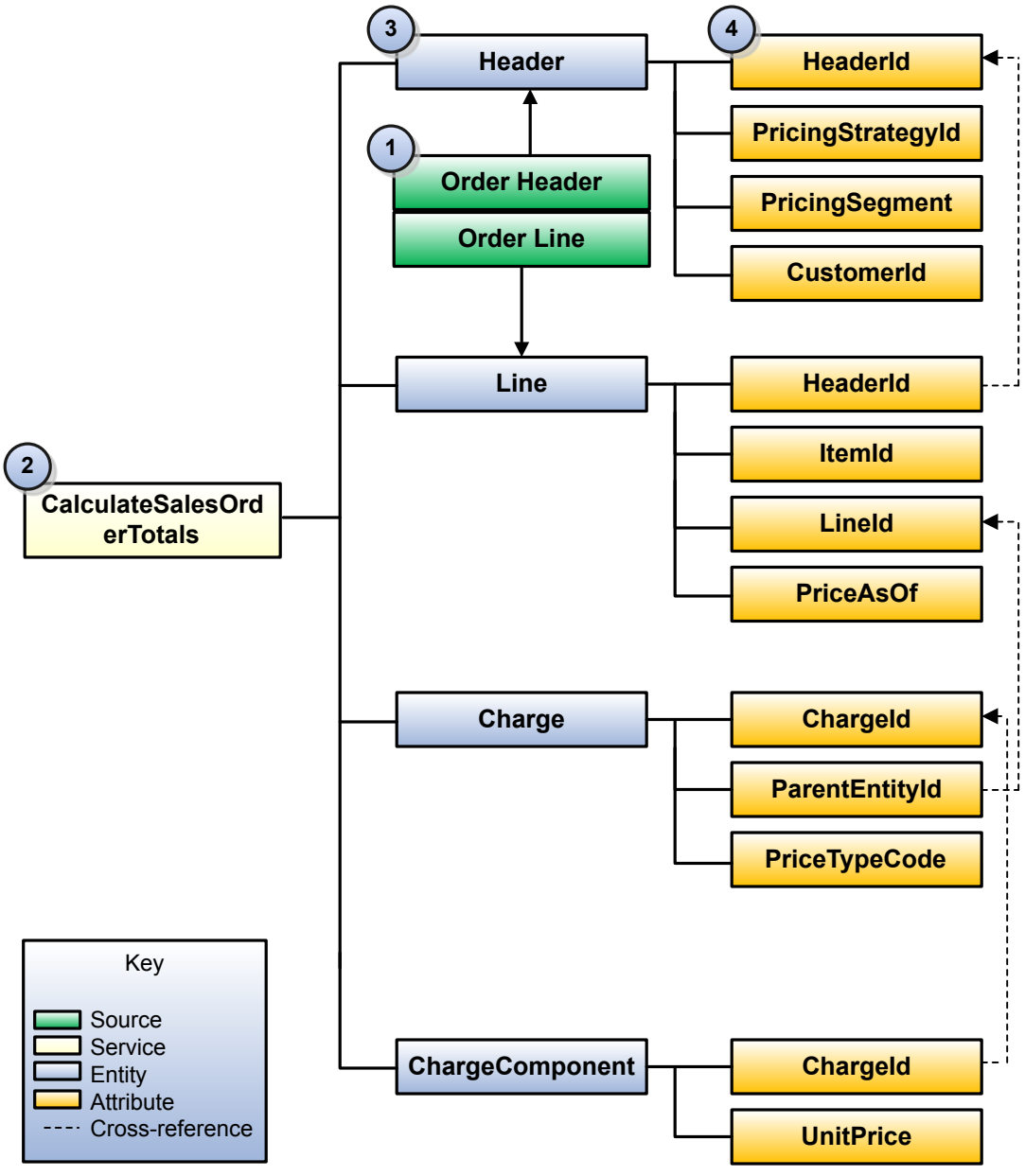
- Determine Pricing Segment
- Determine Pricing Strategy
- Get Price List
- Apply Discounts
- Calculate Shipping Charges

- Calculate Tax
- Calculate Totals

5. Pricing sends the output SDO to Order Management.
6. Order Management receives the output SDO and uses it to update the entities that Order Management uses in a sales order, such as Extended Amount.

How a Service Mapping Maps Inputs to Outputs

A service mapping contains entities, sources, and services. Pricing uses it to map the input SDO to the output SDO. The following diagram illustrates some of the main parts of the Sales service mapping, which is a typical service mapping that comes predefined with Pricing. Pricing uses it to price a sales order.



Explanation of Callouts

You can define the following parts of a service mapping:

1. **Source.** Provides a structure so that Pricing can model data in the input SDO. For example, the predefined Sales service mapping includes the OrderTotal source, and this source includes details about the Order Header and Order Line.
2. **Service.** Requests the service mapping and receives the output SDO. For example, the CalculateSalesOrderTotals service references the entities and attributes that a pricing algorithm can use to calculate the total price of a sales order.
3. **Entity.** References the entities that the service mapping requires to structure the output SDO. In this example, the output SDO includes four entities. Each entity references one or more attributes. For example, the Header entity references the following attributes:
    - **PricingStrategyId.** Allows the service mapping to map the input SDO to the pricing strategy on the output SDO.
    - **PricingSegmentCode and CustomerId.** Allows the service mapping to map the input SDO to the pricing segment on the output SDO.
4. **Attribute.** References the attributes that the service mapping requires to structure the output SDO. Each service mapping fulfills a finite purpose. For example, the Sales service mapping prices a sales order, so it references attributes that a typical sales order includes, such as ItemId so that it can identify the item in the sales order, and UnitPrice so that it can multiply unit price by quantity, and do other calculations. Other service mappings might reference an entirely different set of attributes.

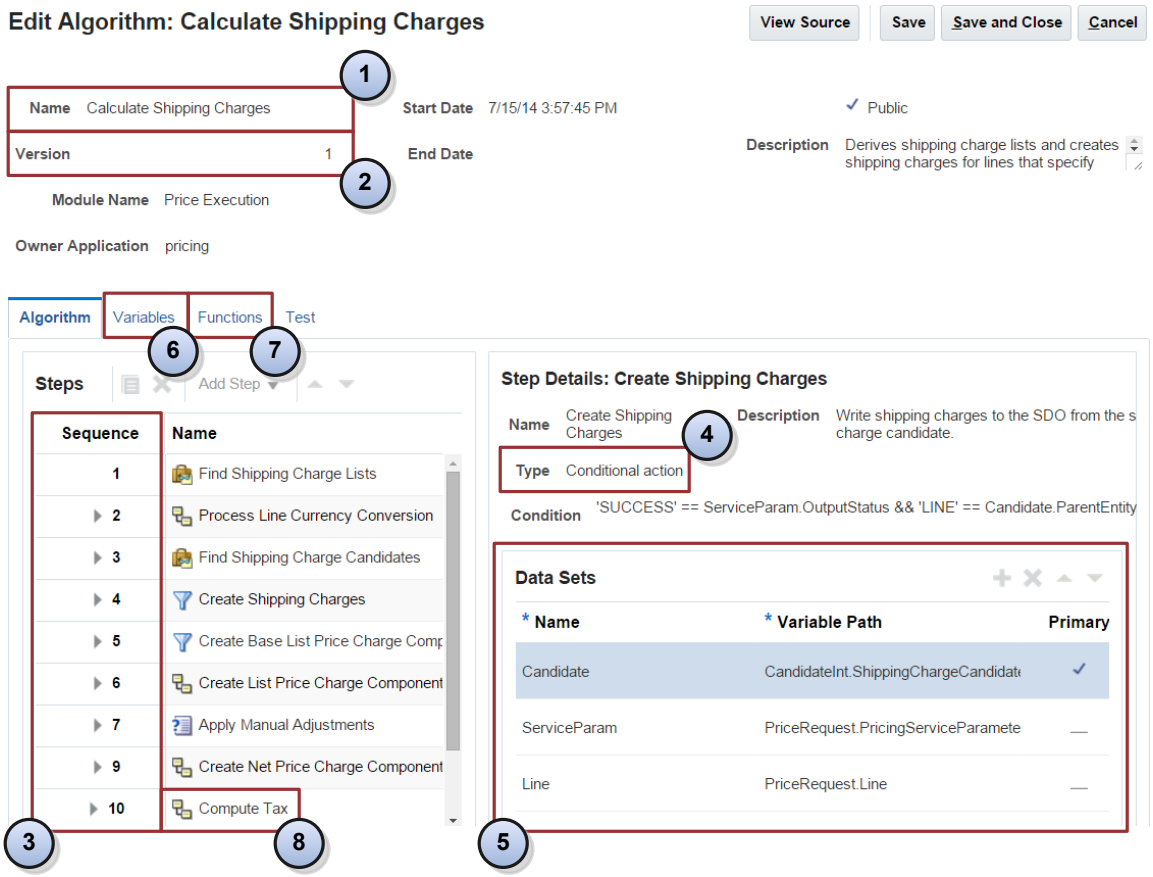
Related Topics

- Profiles, Segments, and Strategies: How They Work Together

Pricing Algorithms: Explained

A pricing algorithm is a process that uses conditional logic, variables, and functions to manipulate data in the output service data object (SDO) that Oracle Fusion Pricing uses, such as adding a value to each attribute in this SDO. You can use it to customize the logic that Pricing uses when it prices an item.

You use Groovy script and Expression Builder to code a pricing algorithm. The following diagram illustrates the parts of a typical pricing algorithm.



Explanation of Callouts

A pricing algorithm includes the following parts:

1. **Name.** Each pricing algorithm achieves a finite goal, such as determining the shipping charge list to use when calculating the shipping charge, and creating the shipping charges for each order line that requires a shipping charge calculation.
2. **Version.** Pricing increments the version of the pricing algorithm each time you publish it. You can use the Manage Algorithm page to access each version so that you can control your declarative programming logic. Pricing uses the latest version in the runtime environment.
3. **Sequence.** A series of steps that the pricing algorithm processes in a sequence. You can move each step up or down to modify the sequence. For example, assume a tax authority requires that you calculate tax only on the item that you are selling, and not on the shipping charge. You can move Step 10, Compute Tax, to immediately above Step 4, Create Shipping Charges.
4. **Type.** Specify the type of logic that the step uses, such as Conditional Action, Nested Action, Group, or Subalgorithm. For details, see Algorithm Steps: Explained.

   For example, Step 4, Create Shipping Charges, is a conditional step that writes the shipping charges to the output SDO only if the order line is a candidate for a shipping charge. It uses the following condition:

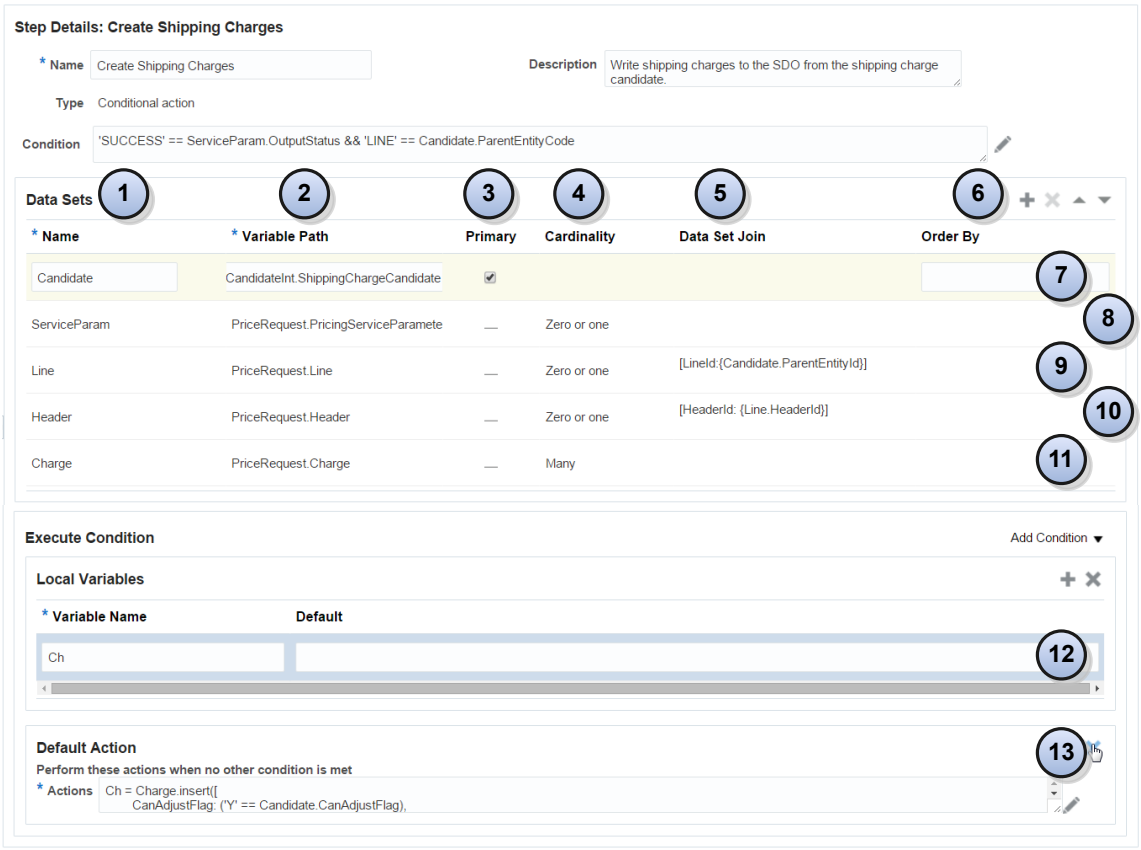
Condition	Description
'SUCCESS' == ServiceParam.OutputStatus & 'LINE' == Candidate.ParentEntityCode	Run this step only if the order line is a candidate for a shipping charge. This condition uses the following format: o **SUCCESS**.t o **ServiceParam**. Identifies a data set in this pricing algorithm step. o **OutputStatus**. o **&&**. o **LINE**. o **Candidate**. Identifies a data set in this pricing algorithm step. o **ParentEntityCode**.

5. **Data Set.** Each row in the Data Sets area constrains the set of records that this step processes.
6. **Variable.** Defines the variables that this pricing algorithm uses. For example, if you set the NeedsCurrencyConversion variable to Yes in the Calculate Shipping Charges pricing algorithm, then each algorithm step that involves currency will perform a conversion.
7. **Function.** A routine that receives data from the pricing algorithm, processes it, and returns one or more values to the pricing algorithm.
8. **Subalgorithm.** A pricing algorithm that this pricing algorithm references. In this example, step 10 of the Calculate Shipping Charges pricing algorithm references the Compute Tax pricing algorithm. At runtime, Pricing runs the subalgorithm, and then returns to the subsequent step. In this example, it returns to step 11.

Pricing Algorithm Data Sets

The Data Sets area of a pricing algorithm constrains the set of records that this step processes.

The following diagram illustrates the parts of a typical pricing algorithm data set.



Explanation of Callouts

A data set includes the following parts:

1. **Name.** Enter text that describes the data set. It is recommended that you use camel case and make the initial letter uppercase.
2. **Variable Path.** Define an expression that provides the source for the data set. You can use one of the following formats:

   To define an expression that references a variable, use the following format:

   - **`AlgorithmVariableName.Attribute`**

   where:

   - **`AlgorithmVariableName`** identifies the name of an algorithm variable.
   - **`Attribute`** identifies an attribute of the service data object.

   In this example, the fourth data set uses the following expression. It specifies to use the PriceRequest variable of this algorithm and the Header attribute of the service data object:

   - **`PriceRequest.Header`**

To define an expression that references a function, use the following format:

- `algorithmFunctionName(argument1.argument2.argument3 . . .)`

For example, the following expression specifies to use the strategyId argument and currencyCode argument of the checkAllowedCurrency function:

- `checkAllowedCurrency(strategyId.currencyCode)`

3. **Primary.** Add a check mark to set this data set as the primary data set. Note that each row in a data set can be one of the following:
   - **Primary.** Identifies the set of records that this step processes. You can define only one primary set for each algorithm step.
   - **Reference.** Identifies an entity that the primary set references through a join condition. Each Reference row in a data set does not define another data set. Instead, it filters the records in the Primary set of records.
4. **Cardinality.** Use one of the following values to specify the cardinality between the primary data set and the reference data set:
   - **One.** Specifies one primary data set to one reference set. Establishes an inner join.
   - **Zero or One.** Specifies zero or one primary data set to one reference set. Establishes an outer join.
   - **Many.** Specifies zero or many primary data sets to one reference set.
5. **Data Set Join.** Define the constraint that this step uses to filter the reference set. If the expression is a literal string, then it is recommended that you define a constraint. For example:
   - `[ActiveFlag: 'Y', HeaderId: {Line.HeaderId}]`

   You can also use a constraint expression, which is a Groovy expression that evaluates to a Boolean value. You can use attributes from the current reference row without a qualifier. If you use a constrain expression, then Pricing filters the reference set and you cannot create an optimized index search, which can degrade performance. If you reference a function in the Variable Path, then you cannot use a constraint expression.
6. **Order By.** Specify to sort the records of the data set in ascending order or descending order, according to one or more columns. You can use the following format:
   - `AttributeName modifier, AttributeName2 modifier`, and so on

   where:
   - modifier is `(DESC|ASC) (NULLS FIRST|NULLS LAST)`

   For example:
   - `NetPrice DESC NULLS LAST, Header.Discount ASC NULLS FIRST NetPrice NetPrice NULLS FIRST`

   If you do not define a modifier, then Pricing uses Ascending.
7. **Candidate.** Pricing comes predefined to use Candidate as the primary for most data sets. The Candidate data set identifies records that are candidates for processing in this step. For example, if an Order Management Cloud user adds shipping charges to order line x, then this step will consider whether or not to apply shipping charges to order line x, depending on other factors that the algorithm considers, such as pricing strategy, pricing segment, and so on. This data set includes the following attributes.

Attribute	Description
Variable Path	Candidate uses the CandidateInt.ShippingChargeCandidate variable path, where: o **CandidateInt.** A variable of this pricing algorithm. It stores a value that determines whether or not the item is a candidate for a shipping charge. o **ShippingChargeCandidate.** An attribute of the service data object. It specifies whether or not the item is a candidate for shipping charges.
Primary	Candidate typically identifies the unfiltered set of records that this step processes, so Primary contains a check mark.

8. **ServiceParam.** Pricing comes predefined to use ServiceParam to identify the service and the parameters of this service that this step uses.

Attribute	Description
Variable Path	ServiceParam typically uses the PriceRequest.PricingServiceParameter variable path, where: o **PriceRequest.** A variable of this pricing algorithm. This variable references the Sales service. o **PricingServiceParameter.** A parameter of the Sales service.
Primary	ServiceParam is typically the primary, and it references other rows in the data set to help filter the primary record set, such as ServiceParam, so Primary does not contain a check mark in rows that are not the primary.
Cardinality	Zero or One specifies that there is zero or one ServiceParam to each Candidate.

9. **Line.** Pricing comes predefined to use Line to identify the attributes on the order lines that this step examines to filter records in the primary record set.

Attribute	Description
Variable Path	Line typically uses the PriceRequest.Line variable path, where: o **PriceRequest.** A variable of this pricing algorithm. This variable references the Sales service. o **Line.** An attribute of the service data object. It identifies an order line.
Cardinality	Zero or One specifies that there is zero or one Line to each Candidate. In this example, each Candidate can reference only a single order line, so the cardinality is one to one. This cardinality also applies to the header because an order line can reference only one header.
Data Set Join	Line typically uses the `[LineId:{Candidate.ParentEntityId}]` join, where: o **LineId.** Identifies the order line. o **Candidate.** References the Candidate data set of this step. o **ParentEntityId.**

10. **Header.** Pricing comes predefined to use Header to identify the attributes on the order header that this step examines to filter records in the primary record set.

Attribute	Description
Variable Path	Header typically uses the PriceRequest.Header variable path, where: o **PriceRequest.** A variable of this pricing algorithm. This variable references the Sales service o **Header.** An attribute of the service data object. It identifies an order header.
Data Set Join	Header typically uses the `[HeaderId: {Line.HeaderId}]` join, where: o **HeaderId.** An attribute that identifies the header. o **Line.** References the Line data set of this step o **HeaderId.**

11. **Charge.** Pricing comes predefined to use Charge to identify the charges that an order line references.

Attribute	Description
Variable Path	Charge typically uses the PriceRequest.Charge variable path, where: o **PriceRequest.** A variable of this pricing algorithm. This variable references the Sales service. o **Charge.** An attribute of the service data object. It identifies one or more shipping charges.
Cardinality	Charge specifies that there are many Candidates to one Charge.

12. **Local Variable.**
13. **Default Action.**

Pricing Algorithm Variables

A pricing algorithm variable stores a value that can change depending on conditions or information that passes through each algorithm step. You can use it to receive data from the object that calls the pricing algorithm, or to send data to this object. You can define the following attributes of a pricing algorithm variable:

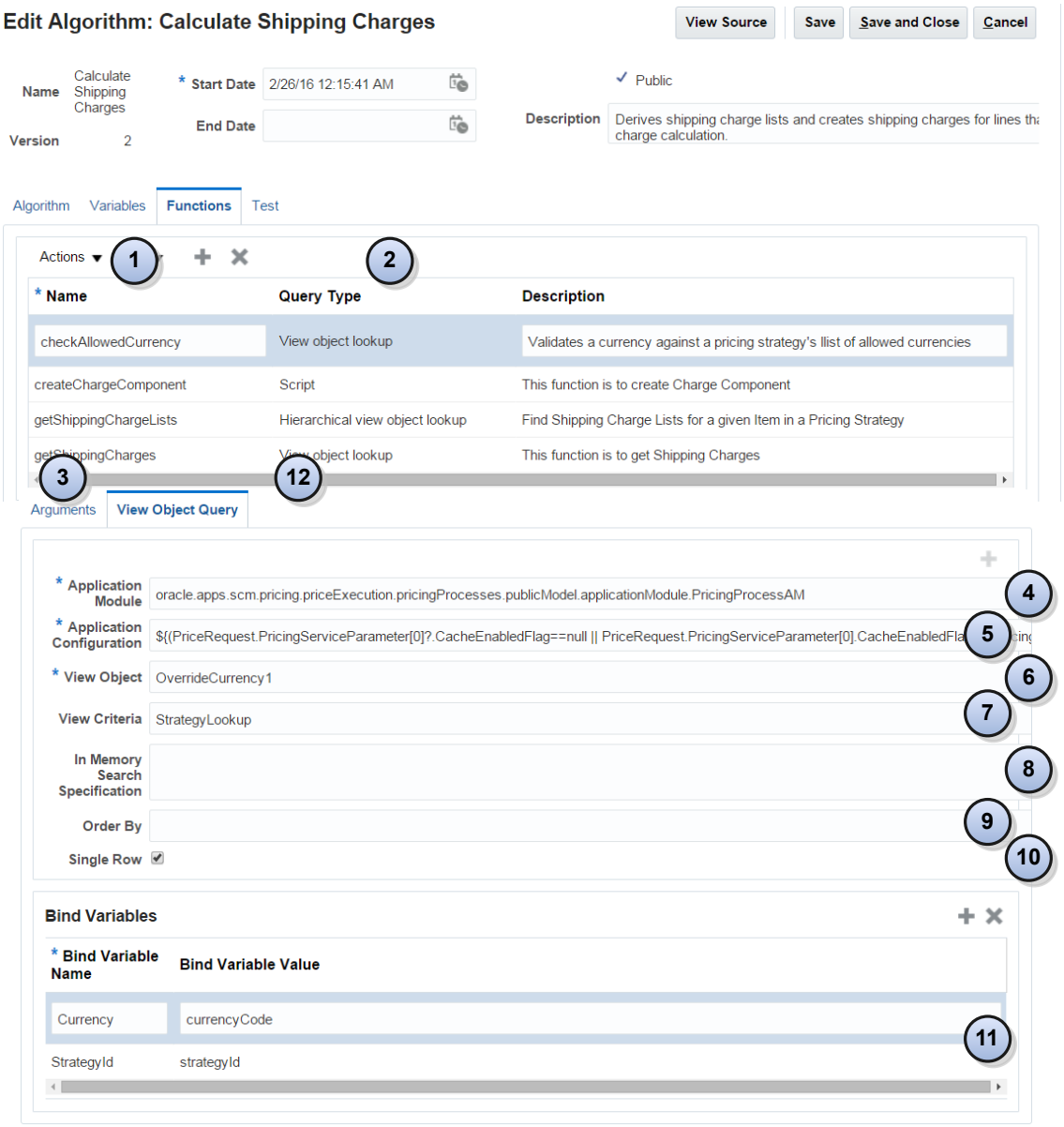
Attributes	Description
Name	Enter alphanumeric text that describes the variable. Do not includes spaces.
Data Type	Set the data type, such as String. If you set Data Type to Data Object, then you must set a value in the Internal Service Schema attribute.
Required	Add a check mark to make this variable required in an algorithm step.

Attributes	Description
Input/Output	Specify to use this variable for the following uses: • **`Input`**. The object that calls this pricing algorithm can send the value of this variable to the pricing algorithm. • **`Output`**. The pricing algorithm can send the value of this variable to the object that calls this pricing algorithm.
Internal Service Schema	If you set the Data Type variable to Data Object, then set Internal Service Schema to the service that provides information to this variable, or that can use the output that this variable provides. For example, the CalculateSalesOrderTotals service calculates the total price of a sales order. If you must use this variable to calculate this total price, then set Internal Service Schema to CalculateSalesOrderTotals.
Default Expression	Enter a Groovy expression that specifies the default value for this variable. If the input payload results in setting the value of this variable to a value that is not empty, then Pricing ignores this expression.

Pricing Algorithm Functions

A pricing algorithm function is a routine that receives data from the pricing algorithm, processes it, and then returns one or more values to the pricing algorithm.

The following diagram illustrates the parts of a typical pricing algorithm function. It displays the properties of a View Object Lookup query type. You can specify different properties for the other query types.



Explanation of Callouts

A pricing algorithm function includes the following parts:

1. **Name.** Enter alphanumeric text. It is recommended that you use camel case and make the first letter lower case. Do not include spaces. For example, enter myPricingFunction.
2. **Query Type.** Choose one of the following values.

Query Type	Description
Script	Call a script that determines the value.
View Object Lookup	Get values from an object that displays in a view in the Pricing Administration work area.
Hierarchical View Object Lookup.	Get values from an object that displays in a hierarchical view in the Pricing Administration work area.

3. **Arguments.** Click the Arguments link, and then add the arguments that you use to communicate data to and from the function. Note the following points:
   - It is recommended that you use camel case and make the first letter upper case. Do not includes spaces. For example, MyPricingFunctionArgument.
   - Pricing uses the arguments that you add in the same sequence that you add them. For example, if you add argument x, and then y, and then z, then Pricing uses argument x first, and then y, and then z. You can click Move Up or Move Down to modify this sequence.
4. **Application Module.**. This example uses the following code.

Example	Description
oracle. apps. scm. pricing. priceExecution. pricingProcesses. publicModel. applicationModule. PricingProcessAM	Identify the application module.

5. **Application Configuration.** This example uses the following code.

Example	Description
${(PriceRequest. PricingServiceParameter[0]. CacheEnabledFlag=null || PriceRequest. PricingServiceParameter[0]. CacheEnabledFlag) ? 'PricingProcessAMShared' : 'PricingProcessAMLocal'}	Specify the application configuration.

6. **View Object.**. This example references the following view object.

Example	Description
SearchShippingCharge1	Specify the view object.

7. **View Criteria.**
8. **In Memory Search Specification.**

Example	Description
isInDateRange(StartDate, EndDate, pricingDate)	Specify how to search records that are currently in memory, where: o **isInDateRange**. The name of the search specification. o **StartDate**. The search specification will only return records that start on or after this date. o **EndDate**. The search specification will only return records that start on or before this date. o **pricingDate**. The search specification will only return records that occur on this date.

9. **Order By.** Specify how to sort the records of the data set in ascending order or descending order, according to one or more columns. For details, see the Pricing Algorithm Data Sets section of this topic.
10. **Single Row.**
11. **Bind Variables.**
12. **Hierarchical Query.** If you add a hierarchical view object lookup, then you can click the Hierarchical Query tab, and then set the following properties.

Properties	Description
Connect By	Specify how to connect.
Query Result Alias	Specify the alias.

Related Topics

- Oracle Fusion Pricing: Overview

Pricing Algorithm Steps: Explained

You can specify the type of logic that a pricing algorithm step uses, such as Conditional Action, Nested Action, Group, or Subalgorithm.

This topic describes the following step types that you use in most situations:

- Conditional Action Step
- Nested Action Step
- Group Step

Conditional Action Step

A conditional action step performs an action on all rows in the primary data set if this set meets the condition that you specify. It uses the following structure:

```
If (condition 1) { . . . }
else if (condition 2) { . . . }
else if (condition 3) { . . . }
```

```
. . .
else { default }
```

In this example, you examine a step that calculates a rollup charge for a configured item. It evaluates each row of the primary data set, iterates through the charge for the root item of the configured item, and the charge for each child item, and creates a rollup charge for each charge definition, as necessary. It does the following work:

- Get the charges from the PriceRequest payload.
- If `Charge.RollupFlag = true`, which indicates that the payload contains at least one rolled up charge, then create a RollupCharge node in the payload.
- Populate the RollupCharge node with rolled-up charges for each child item of the configured item.
- Set the OutputStatus to SUCCESS on the ServiceParam node to indicate that this step successfully created the rollup charges.

Examine a step that includes a conditional action:

1. Log in to Oracle Fusion Pricing with the Pricing Administrator job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Algorithms**.
3. On the Manage Algorithms page, click **Calculate Rollup Charges for Prepriced Orders**, click **Actions**, and then click **Create Version**.
4. In the Name column, click the new version of Calculate Rollup Charges for Prepriced Orders that you just created.
5. On the Edit Algorithm page, click the **Create Rollup Charge** step.
6. In the Step Details area, in the Condition window, examine the following code.

Condition	Description
!Charge. RollupFlag && 'LINE' == Charge. ParentEntityCode && ('ROOT' == Line. ItemType || 'COMPONENT' == Line. ItemType)	Set the exit criteria for this step. In this example, this condition sets the OutputStatus to SUCCESS on the ServiceParam node to indicate that this step successfully created the rollup charges.

7. In the Step Details area, notice the following parts of the Execute Condition area.

Part	Description
Local Variable	Declare variables that apply only to the code that you write in the Conditional Actions and Default Action areas.
Conditional Actions	Define the conditional logic that Pricing applies for this step.
Default Action	If the conditional action does not evaluate to true, then define the logic to use for this default action step.

8. In the Local Variables area, notice the following variables.

Variable Name	Description
Rollup	Identifies each charge when Pricing iterates through the code in the Action window in the Conditional Actions area.
RollupChargeCounter	Counts the iterations.

Variable Name	Description

9. In the Conditional Actions area, notice the following condition.

True Condition	Description
RollupCharge. size() = 0	Specifies the condition.

10. In the Conditional Actions area, examine the code in the Actions window. Notice that this code gets the charges for each child item of the configured item, and then populates the RollupCharge node with the rolled-up charge for this child. Pricing iterates through this code for each child item until it prices each child.
11. Click **Add Condition**, and then click **True Condition**.

    Notice that Pricing added a new condition in the Conditional Actions area. If you add multiple conditions, then Pricing evaluates each condition in the sequence that the Conditional Actions area displays them. You can click Move Up or Move Down to modify this sequence.
12. In the Conditional Actions area, click **Delete**.
13. On the Manage Algorithms page, delete the In Progress version of the Calculate Rollup Charges for Prepriced Orders pricing algorithm.

Nested Action Step

A nested action step performs a different action on each row of the data set. For example, assume you must implement the following logic:

- If more than one order line on a sales order references the same item, then apply a discount for this item. In this example, you can write a pricing algorithm step that applies action x to the first row of the data set, and action y to the other rows of the data set.

In this example, you examine a step that finds a charge on the shipping charge list for each item on each order line, and then writes the candidates to the output SDO.

Examine a step that includes a nested action:

1. Log in to Oracle Fusion Pricing with the Pricing Administrator job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Algorithms**.
3. On the Manage Algorithms page, click **Calculate Shipping Charges**, click **Actions**, and then click **Create Version**.
4. In the Name column, click the new version of Calculate Shipping Charges that you just created.
5. On the Edit Algorithm page, click the **Find Shipping Charge Candidates** step.
6. In the Step Details area, in the Condition window, examine the following code.

Condition	Description
'SUCCESS' == ServiceParam. OutputStatus & 'ERROR' != Line. MessageTypeCode && 'ORDER' == Line. LineCategoryCode & ('STANDARD' == Line.ItemType || 'ROOT' == Line. ItemType) & Line. AppliedShippingChargeListId != null && finer(AlgmName + ': finding charge	Set the exit criteria for this step. In this example, this condition sets the OutputStatus to SUCCESS on the ServiceParam node to indicate that this step successfully found a charge on the shipping charge list for each item on each order line, and then wrote the candidates to the output SDO.

Condition	Description
candidates for line ' + Line.LineId + ' (' + Line. InventoryItemId + ')') == null	

7. In the Nested Action area, notice that you can choose the data set that this step will query each time it processes a row in the primary data set. In this example, notice that this step comes predefined to use the Charge data set because it includes the data that this step requires to find a charge on the shipping charge list for each item, such as the PricingStrategyId to use for the order line, the SellingBusinessUnitId for the order header, and so on.
8. In the Actions area, click Add Action, and then notice that you can specify a different action for each row that the query returns. For example, choose First Row Actions to add an action that this step performs only on the first row that the query returns.
9. In the First Row Actions area, in the Actions window, examine the code, and notice that it finds a charge on the shipping charge list for each item that the first row references.

   To simplify viewing, copy this code to the clipboard, and then paste it into a word processing application.
10. In the No Row Actions area, in the Actions window, examine the code, and notice that it handles a situation where the step could not locate a shipping charge list for the item.
11. On the Manage Algorithms page, delete the In Progress version of the Calculate Shipping Charges pricing algorithm.

Group Step

A group step groups the rows in the primary data set according to the value of an attribute, and then processes a different action for each group. For example, the predefined Aggregate Roll Up Charge Components pricing algorithm rolls up charges so that your customer can view one value for a configured item. This step creates an aggregate charge component that sums the individual charge components for a rollup charge.

In this example, you examine a step that finds a charge on the shipping charge list for each item on each order line, and then writes the candidates to the output SDO.

Examine a step that includes a nested action:

1. Log in to Oracle Fusion Pricing with the Pricing Administrator job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Algorithms**.
3. On the Manage Algorithms page, click **Aggregate Roll Up Charge Components**, click **Actions**, and then click **Create Version**.
4. In the Name column, click the new version of Aggregate Roll Up Charge Components that you just created.
5. On the Edit Algorithm page, click the **Create Aggregate Charge Component by Element Code** step.

   This step examines charge components that are not aggregated and adds them together according to the price element code for each rollup charge. It then creates the corresponding aggregate charge component and sets the RollupFlag for this component to true.
6. In the Step Details area, in the Condition window, examine the following code.

Condition	Description
'SUCCESS' == ServiceParam. OutputStatus & !(Comp. IsPassedIn ?: false) && Rollup != null & & !(Rollup. IsPassedIn ?: false) && 'LINE' == Rollup. ParentEntityCode & (PriceElement == null || Comp. PriceElementCode == PriceElement) & & !Comp. RollupFlag && Comp.	Sets the exit criteria for this step. In this example, this condition sets the OutputStatus to SUCCESS on the ServiceParam node to indicate that this step successfully added charge components according to the price element code for each rollup charge, and then created the corresponding aggregate charge component.

Condition	Description
AggregateChargeComponentId = null && Comp. SourceTypeCode!'MANUALADJUSTMENT	

7. In the Group by Attributes area, notice the following predefined attributes. This step uses the following attributes to arrange rows in the primary data set into groups.

Attribute	Description
Rollup. ChargeId	Groups rows in the primary data set according to the ChargeId attribute in the Rollup data set.
Comp. PriceElementCode	Groups rows in the primary data set according to the PriceElementCode attribute of the Comp data set.

Each attribute that you add in the Group by Attributes area adds the potential for a separate group of rows in the primary data set. Pricing arranges them sequentially according to the attributes you add. If you add more than one attribute, then Pricing places the group according to the sequence that the Group by Attributes area displays them. It places the first group first, and the second group immediately after the first group. It places rows that do not fall in any group immediately after the last group. For example, assume the following:

- The ChargeId attribute in rows two, five, and seven of the Rollup data set each equal 123.
- The PriceElementCode attribute in rows three, eight, and nine of the **Comp** data set each equal 456.

In this situation, this step arranges rows in the following sequence in the **Comp** primary data set:

- Row two of the Rollup data set
- Row five of the Rollup data set
- Row seven of the Rollup data set
- Row three of the **Comp** data set
- Row eight of the **Comp** data set
- Row nine of the **Comp** data set
- All other rows that do not fall in the first group or the second group

8. In the Actions area, click **Add Action**, and then notice that you can specify the following different actions for the rows in each group.

Actions	Description
Group First Row Actions	Groups actions for the first row.
Group Each Row Actions	Groups actions for each row.
Group Last Row Actions	Groups actions for the last row.

9. On the Manage Algorithms page, delete the In Progress version of the Aggregate Roll Up Charge Components pricing algorithm.

Related Topics

- Oracle Fusion Pricing: Overview

Managing Pricing Matrix Types: Procedure

Oracle Fusion Pricing uses the Manage Matrix Types page to map a matrix class to a matrix type to make sure each pricing entity in the Pricing Administration work area references the correct matrix class.

You can use the Manage Matrix Types page to assign one matrix class to a matrix type. For example, Pricing maps the predefined Price List Charge Adjustment matrix class to the predefined Price List Charge Adjustment matrix type. This mapping makes sure that the condition columns and result columns of the matrix class named Price List Charge Adjustment display correctly in the Price List page in the Pricing Administration work area, and to make sure that you use these columns when you create a pricing rule that adjusts price according to an attribute.

This topic includes example values. You might use different values, depending on your business requirements.

Manage a pricing matrix type:

1. In the Navigator, click **Setup and Maintenance**.
2. On the Setup and Maintenance page, click **Order Management**, and then click **Setup**.
3. On the Setup page, search for, and then open Manage Pricing Matrix Types.
4. On the Manage Pricing Matrix Types page, examine the pricing matrix types that come predefined with Pricing.
   To reduce maintenance, it is recommended that you use a predefined pricing matrix type instead of creating a new one.
   Examine the mapping of each matrix type to matrix class so you know which matrix class where Pricing will add the attribute. You must also know the details of the attribute, its domain, and mappings within the matrix class. After implementing the matrix class, you can define the matrix rules that will use the new attribute.
5. If you cannot locate a pricing matrix type that meets your requirements, then click **Actions**, click **Add Row**, and then set the following values.

Attribute	Value
Matrix Type Code	Enter text that Pricing can use to reference this pricing matrix type. Pricing assigns each pricing entity that it associates with a pricing matrix to this matrix type code. A QP_ (QP underscore) prefix identifies the predefined pricing matrix types.
Name	Enter text that describes this pricing matrix type. Pricing displays the text that you enter in the Pricing Administration work area. It is recommended that you use headline capitalization, such as My Custom Pricing Matrix Type.
Dynamic Matrix Class	Choose the Dynamic Matrix Class that identifies the conditions, results, and domain values.
Allow Multiple Matrixes	Add a check mark to allow multiple matrixes for the pricing entity.
Active	Add a check mark to make this matrix available during run time.

6. Click **Save**.

Related Topics

- Oracle Fusion Pricing: Overview
- Pricing Rules: Explained

Managing Pricing Process Assignments: Procedure

A pricing process assignment maps a pricing operation to a pricing algorithm.

The predefined Price Request service mapping uses the pricing process assignment to identify and run the pricing algorithm at run time. Oracle Fusion Pricing runs the pricing algorithm when it requires the operation that you specify. The pricing algorithm calculates the prices, adjustments, totals, or profit margins that the pricing operation requires. For example, you can specify to call the Price Sales Transactions pricing algorithm for the Price Request service.

Pricing comes predefined to primarily use the Price Sales Transactions pricing operation and the Calculate Sales Order Totals pricing operation. It also uses the Get Sales Pricing Strategy pricing operation. Pricing does not currently use the Validate Sales Price pricing operation. The predefined Price Request service mapping includes these pricing operations.

For details about how Pricing uses a pricing process assignment, see Pricing Architecture: How it Works.

This topic includes example values. You might use different values, depending on your business requirements.

Manage a pricing process assignment:

1. In the Navigator, click **Setup and Maintenance**.
2. On the Setup and Maintenance page, click **Order Management**, and then click **Setup**.
3. On the Setup page, search for, and then open Manage Pricing Process Assignments.
4. On the Manage Pricing Process Assignments page, examine the pricing process assignments that come predefined with Pricing.

   To reduce maintenance, it is recommended that you use a predefined pricing process assignment instead of creating a new one.
5. If you cannot locate a pricing process assignment that meets your requirements, then click **Actions**, click **Add Row**, and then set the following values.

Attribute	Value
Pricing Operation	Choose the pricing operation.
Process Name	Choose the pricing algorithm that Pricing must run to meet the needs of the pricing operation.

6. If necessary, click **Update SDO** to update the service data object (SDO) so that it can use the pricing operation.

   For example, assume you add a field named Customer Rating in the quote header SDO and must use it to determine the pricing strategy. In this situation, you must select the row that includes the Get Sales Pricing Strategy pricing operation, and then click Update SDO.
7. Click **Save**.

Related Topics

- Oracle Fusion Pricing: Overview

Managing Pricing Algorithms: Procedure

A pricing algorithm is a process that uses conditional logic and calls functions to manipulate data in the output service data object (SDO), such as adding a value to each attribute in this SDO. You can modify a predefined pricing algorithm, or create a custom algorithm.

Predefined pricing algorithms provide a wide variety of pricing functionality. You might find it useful to modify some of these algorithms to implement custom behavior. Some algorithms contain a significant amount of logic. It is recommended that you examine them to determine which ones you can modify to implement the logic that your business requires.

For details about how a pricing algorithm works, see Pricing Architecture: How it Works.

For the example in this topic, assume you must remove tax calculations that a predefined pricing algorithm performs so that the price of each sales order that your users create in Order Management Cloud does not include tax.

This topic includes example values. You might use different values, depending on your business requirements.

Summary of the Work

To modify a pricing algorithm, do the following work:

1. Examine the current behavior.
2. Create a new version of the algorithm.
3. Modify the pricing algorithm.
4. Verify your work.

Examine the Current Behavior

Examine the current behavior:

1. Log in to Order Management with a job role that allows you to create a new sales order, such as ORDER_MGR_OPERATIONS, and then, in the Navigator, click **Order Management**.
2. Click **Tasks**, and then click **Create Order**.
3. On the Create Order page, add a customer, and then add an item.

   For example, add a sales order that includes the following values, and then click **Add**.

Attribute	Value
Customer	Computer Service and Rentals
Select Item	AS54888

4. In the Amount column, click the **link**, and then notice that the Amount dialog includes an amount for tax.

   For example.

Price Component	Amount
List Price	2,500

Price Component	Amount
Discount	100
Tax	200
Net Price Plus Tax	2,600

Create a New Version of the Algorithm

Create a new version of the algorithm:

1. Log in to Oracle Fusion Pricing with the Pricing Administrator job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Algorithms**.
3. On the Manage Algorithms page, locate the algorithm that you must modify.

   Predefined pricing algorithms provide a wide variety of pricing functionality. To locate the pricing algorithm that you must modify, peruse the links in the Name column, click one that looks promising, and then examine the steps. It might be necessary to examine multiple pricing algorithms.

   For this example, you must disable tax calculation for a sales transaction, so, select the **row** that displays Price Sales Transactions in the Name column. Note that, for most situations, you can modify the Price Sales Transactions pricing algorithm to implement custom logic that you might require for pricing.
4. Click **Actions**, and then click **Create Version**.

   Notice that Pricing creates a new version and sets the Status to In Progress.

Modify the Pricing Algorithm

Modify the pricing algorithm:

1. In the Name column of the version you just created, click **Price Sales Transactions**.
2. On the Edit Algorithm page, examine the step names to verify that this pricing algorithm can implement the behavior you require.

   This algorithm includes step names that calculate tax, such as Compute Sales Tax, so it is likely that you can modify it to achieve the custom behavior that this example requires.
3. Click the **row** that contains Compute Sales Tax in the Name column, click the **Delete icon**, and then click **Save**.
4. On the Manage Algorithms page, click the **row** that contains the highest version of Price Sales Transaction, click **Actions**, and then click **Publish**.

Verify Your Work

Verify your work:

1. Log in to Order Management, create a sales order, add a customer to this sales order, and then add an item.
2. In the Amount column, click the **link**, and then make sure that the Amount dialog does not include an amount for tax.

   For example.

Price Component	Amount
List Price	2,500
Discount	100
Net Price Plus Tax	2,400

Related Topics

- Oracle Fusion Pricing: Overview

Modifying Pricing Algorithm Variables: Procedure

You can modify the variables in a pricing algorithm that comes predefined with Oracle Fusion Pricing, or in one of your custom algorithms.

Predefined pricing algorithms provide a wide variety of pricing functionality. You might find it useful to modify some of these algorithms to implement custom behavior.

For the example in this topic, assume you must allow your users to set the value for the Calculation GSA price, for segment price list charges, and to validate that segment prices that are greater than or equal to GSA prices.

This topic includes example values. You might use different values, depending on your business requirements.

Summary of the Work

To manage a price list, do the following work:

1. Examine the current behavior.
2. Create a new version of the algorithm.
3. Examine the pricing strategy and pricing strategy assignment.
4. Verify your work.

Examine the Current Behavior

Examine the current behavior:

1. Log in to Order Management with a job role such as ORDER_MGR_OPERATIONS, that allows you to create a new sales order, and then, in the Navigator, click **Order Management**.
2. Click **Tasks**, and then click **Create Order**.
3. On the Create Order page, add a customer, and then add an item.

   For example, add a sales order that includes the following values, and then click **Add**.

Attribute	Value
Customer	Computer Service and Rentals

Attribute	Value
Select Item	AS54888

4. In the Amount column, click the link, and then notice that the Amount dialog does not include pricing for GSA.

   For example.

Price Component	Amount
List Price	2,500
Discount	100
Tax	200
Net Price Plus Tax	2,600

5. Log out of Order Management.

Create a New Version of the Algorithm

Create a new version of the algorithm:

1. Log in to Oracle Fusion Pricing with the Pricing Administrator job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Algorithms**.
3. On the Manage Algorithms page, locate the algorithm that you must modify.

   Predefined pricing algorithms provide a wide variety of pricing functionality. To locate the pricing algorithm that you must modify, examine the links in the Name column, click one that looks promising, and then examine the steps. It might be necessary to examine multiple pricing algorithms.

   For this example, you must allow your users to modify a price for a sales transaction, so, select the row that includes Price Sales Transactions in the Name column.
4. Click **Actions**, and then click **Create Version**.

   Notice that Pricing creates a new version and sets the Status to In Progress.
5. In the Name column of the version you just created, click **Price Sales Transactions**.
6. On the Edit Algorithm page, examine the step names to verify that this pricing algorithm can implement the behavior your require.

   This algorithm includes step names that set the value for the GSA price, such as Calculate GSA Price, so it is likely that you can modify it to achieve the custom behavior that this example requires.
7. Click **Variables**.
8. In the row that contains CalculateGSAPrice in the Name column, set the following value, and then click **Save and Close**

Attribute	Value
Default Expression	true

Attribute	Value

9. On the Manage Algorithms page, choose the row that contains the highest version of Price Sales Transaction, click **Actions**, and then click **Publish**.

Examine the Pricing Strategy and Pricing Strategy Assignment

Examine the pricing strategy and pricing strategy assignment:

1. Click **Tasks**, and then click **Manage Pricing Strategy Assignment**.
2. Select the Strategy Assignment header row, and review the line for the Pricing Segment value: GSA Corporate Segment. Note how, for the Pricing Segment value Corporate Segment, the Pricing Strategy value GSA Corporate Strategy is assigned. Note how, from the pricing setups (for Customer Pricing Profile, Pricing Segment and Pricing Strategy Assignment), you can conclude that customer Computer Service and Rentals has: Pricing Segment of GSA Corporate Segment and Pricing Strategy of GSA Corporate Strategy.
3. Examine the price list and verify that it contains the following values.

Attribute	Value
Item	AS5488
Pricing Charge Definition	Sale Price
Charge Type	One Time
Charge Sub Type	Price
Calculation Method	Price
Base Price	200

Verify Your Work

Verify your work:

1. Log in to Order Management, create a sales order, add a customer to this sales order, and then add an item.
2. In the Amount column, click the link, and then make sure that the Amount dialog does not include an amount for tax.

   For example.

Price Component	Amount
List Price	2,500
Discount	100
Net Price Plus Tax	2,400

Related Topics

- Oracle Fusion Pricing: Overview
- Managing Price Lists: Procedure

Managing Service Mappings: Procedure

A service mapping specifies a group of pricing entities and attributes that a service can retrieve and update. You can use it to model entities and attributes in a declarative environment without having to write software code. The service mapping allows an application, such as Order Management Cloud, to price an item without having to get the pricing schema that Oracle Fusion Pricing requires.

For details about how a service mapping works, see Pricing Architecture: How it Works.

For the example in this topic, assume you must add a custom attribute to a predefined service mapping so that Pricing can map custom freight information for an order line.

This topic includes example values. You might use different values, depending on your business requirements.

Summary of the Work

To manage a service mapping, do the following work:

1. Add the attribute that will contain the custom data.
2. Add the attribute to the service.
3. Add the attribute to the source.

Add the Attribute That Will Contain the Custom Data

Add the attribute that the service mapping can use to contain the custom data:

1. Log in to Oracle Fusion Pricing with the Pricing Administrator job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Service Mappings**.
3. On the Manage Service Mappings page, click **Sales**.

   Pricing comes predefined with the Sales service mapping that prices sales orders and order lines.
4. On the Edit Service Mappings page, click **Entities**

   You use the Entities tab to define the entity that receives the output of the service mapping.
5. Click the **row** that includes Line in the Entity column.

   The freight on board attribute resides on an order line, so you add it to the Line entity.
6. In the Line Details area, click **Actions**, click **Add Row**, set the following values, and then click **Save**.

Attribute	Value
Attribute	FreightOnBoardCode_ Custom
Type	String

Attribute	Value
Allow Null	Contains a check mark

Add the Attribute to the Service

You must add the custom attribute to the service that will process the request so that this service can reference the custom attribute when it maps the input service data object (SDO) to the output SDO. For details, see Pricing Architecture: How It Works.

Add the custom attribute to the service:

1. Click **Services**, and then click the **row** that includes PriceRequestLine in the Service column.
   Each of the services that comes predefined with Pricing performs a finite service. For example, PriceRequestLine processes a request to price an order line, CalculateSalesOrderTotals processes a request to calculate the total price for a sales order, and so on.
2. In the PriceRequestLine Details area, in the Entities tab, click the **row** that includes Line in the Entity column.
3. In the Line Entities area, click **Actions**, click **Add Row**, set the following values, and then click **Save**.

Attribute	Value
Attribute	FreightOnBoardCode_ Custom You might need to scroll to the bottom of the list to locate this attribute.
Read	Contains a check mark
Write	Does not contain a check mark

Add the Attribute to the Source

You must add the custom attribute to the source. The service mapping uses this source to structure the input SDO. In this example, the calling application, such as Order Management Cloud, will send a custom code for freight on board, so you must administer the source so that it can accommodate this code.

Add the attribute to the source:

1. Click **Sources**, and then click the **row** that includes OrderLine in the Source column.
   Each source that comes predefined with Pricing provides a unique model that the service mapping can use to structure the input SDO. For example, consider the following sources:
   - **OrderLine.** References entities that an order line typically includes, such as the Line entity. These entities reference attributes that an order line typically includes, such as quantity, the date that the customer requested the order line, and so on.
   - **OrderHeader.** References entities that an order header typically includes, such as the Header entity. These entities reference attributes that an order header typically includes, such as the customer identification, the selling business unit, the pricing strategy, and so on.
2. In the OrderLine Details area, in the Entities tab, click the **row** that includes Line in the Entity column.

3. In the Line Details area, in the Attribute Mappings tab, click **Actions**, click **Add Row**, set the following values, and then click **Save**.

Attribute	Value
Attribute	FreightOnBoardCode_ Custom
View Object Attribute	FreightTermCode

Related Topics

- Oracle Fusion Pricing: Overview

Managing Matrix Classes: Explained

A matrix class allows you to use a declarative environment to define the conditions and results that you specify when you add a pricing matrix to a pricing entity.

You can add a pricing matrix to the following pricing entities:

- Pricing strategy assignment
- Pricing segment
- Price list
- Cost list
- Currency conversion list
- Shipping charge list
- Returns price list

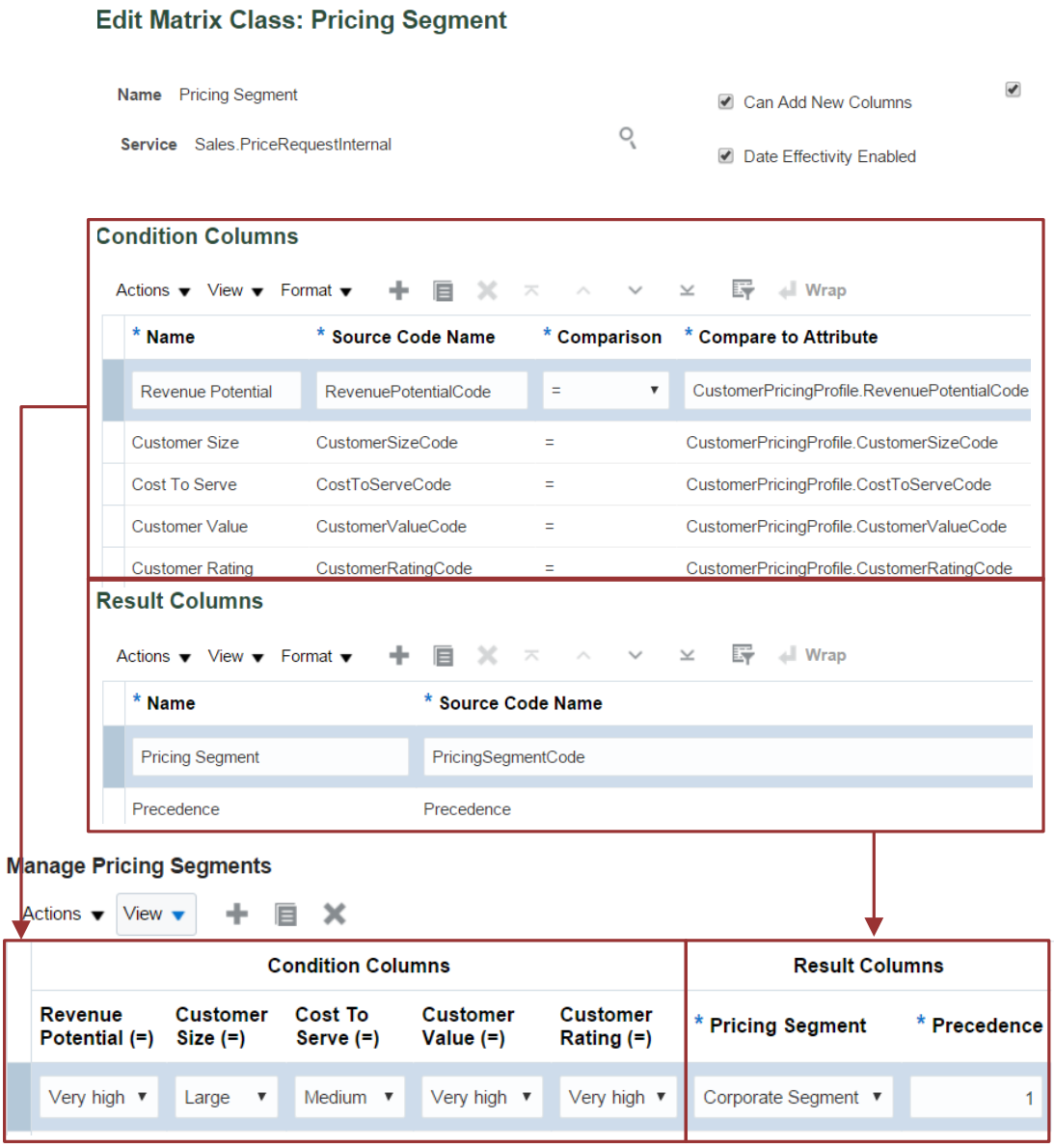
Oracle Fusion Pricing comes predefined with matrix classes that specify the conditions and results that these pricing entities display when you add a pricing matrix.

Examine a predefined matrix class:

1. Log in to Oracle Fusion Pricing with the Pricing Administrator job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Matrix Classes**.
3. On the Manage Matrix Classes page, click **Pricing Segment**.
4. On the Edit Matrix Class page, notice the following values.

Condition Columns	Result Columns
Revenue Potential	Pricing Segment
Customer Size	Precedence
Cost To Serve	
Customer Value	
Customer Rating	

5. Click **Tasks**, and then click **Manage Pricing Segments**.
6. Notice that the predefined Pricing Segment matrix class that you examined in step 4 determines the following condition columns and result columns that you can specify for a pricing segment.



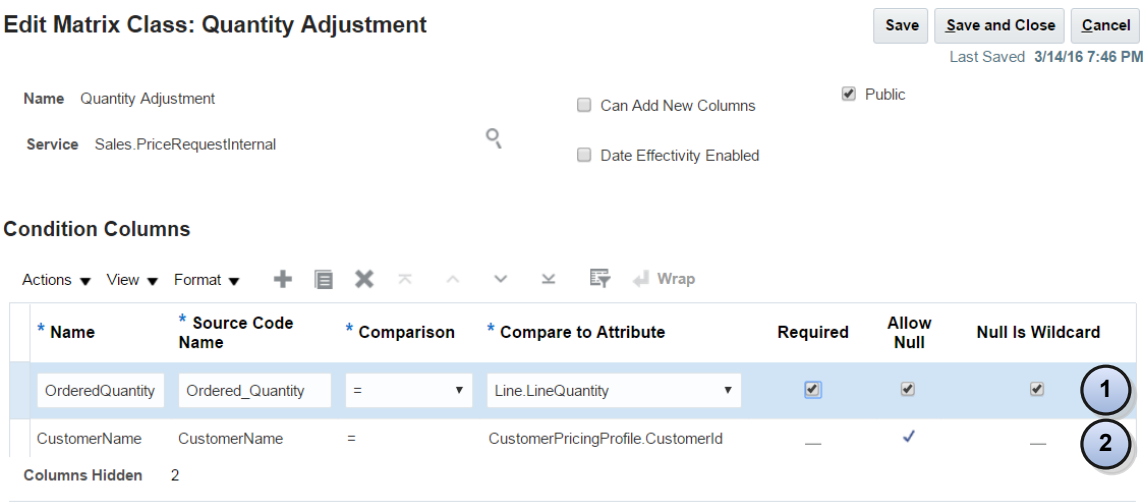
7. On the Edit Matrix Class page, in the Revenue Potential row, notice the following attributes. These attributes determine the values that you can choose for the Revenue Potential column in the pricing matrix on the Manage Pricing Segments page.

Attribute	Value
Compare to Attribute	CustomerPricingProfile. RevenuePotentialCode

Attribute	Value
	In this example, the pricing matrix gets the values from the RevenuePotentialCode attribute of the pricing profile named CustomerPricingProfile.
Domain	Lookup:ORA_ QP_ REV_ POTENTIAL_ VALUES The pricing matrix gets values from the ORA_ QP_ REV_ POTENTIAL_ VALUES lookup.

Condition Column Attributes

Consider the following example:



These conditions implement the following logic:

1. If the user does not enter any quantity for a sales order, or if the user enters any quantity.
2. If the user does not choose a value for the customer on the sales order.

Related Topics

- Oracle Fusion Pricing: Overview
- Managing Pricing Segments: Procedure
- Pricing Rules: Explained

Managing Matrix Classes: Procedure

You can use a matrix class to apply conditional logic on a pricing entity according to the value of an attribute that you specify.

In this example, you modify a predefined pricing matrix so that you can add the following adjustments to a pricing rule according to the value of the Customer Region attribute:

Customer Region	Adjustment
North	10% discount
South	0% discount
East	5% discount
West	15% discount

In this example, the Customer Region is the condition, and the Adjustment Type of **% discount** and Adjustment Amount are the results. For example, if the Customer Region contains North, then reduce the price by 10%.

This topic includes example values. You might use different values, depending on your business requirements.

To manage a matrix class, do the following work:

1. Define the condition column.
2. Test your work.

Define the Condition Column

Define the condition column:

1. Log in to Oracle Fusion Pricing with the Pricing Manager job role, and then, in the Navigator, click **Pricing Administration**.
2. On the Overview page, click **Tasks**, and then click **Manage Matrix Classes**.
3. On the Manage Matrix Classes page, click **Price List Charge Adjustments**.
   You can modify the predefined Price List Charge Adjustments matrix class to modify the pricing matrix that you add to a price list. Oracle Fusion Pricing comes predefined with a number of matrix classes. To help reduce maintenance, it is recommended that you examine them, and then modify one of them to meet your business requirement rather than create a new matrix class.
4. On the Edit Matrix Classes page, notice the following values.

Attribute	Description
Service	Specifies a service that a service mapping references. For details, see Managing Service Mappings: Procedure.
Public	Allows applications other than Oracle Fusion Pricing to use this matrix class.
Date Effectivity Enabled	Allows the pricing rule that uses this matrix class to preserve a history of changes that Pricing makes to some attributes. This allows you to examine older versions of a pricing entity which might be helpful in some troubleshooting situations.
Can Add New Columns	Allows you to add new columns to a pricing rule.

5. Scan the Condition Columns area and the Result Columns area.
   Note that these areas determine the conditions and the results that the adjustment matrix displays when you add a pricing matrix. For an example of this matrix, see Adjusting Prices: Explained.

6. In the Condition Columns area, click **Actions**, click **Add Row**, and then set the following values.

Attribute	Value
Name	Geography ID
Source Code Name	GeographyID
Comparison	=
Compare to Attribute	For this example, choose Line. FulfillmentGeographyId. You can choose the attribute that Pricing examines to determine whether or not the condition is true. For example, assume a sales order in Order Management Cloud contains an attribute that stores a value for FulfillmentGeographyId. At runtime, if Geography ID equals the value that the FulfillmentGeographyId attribute of the order line contains, then Pricing applies the result that the adjustment matrix specifies.
Required	Leave empty. If you add a check mark, then you must provide a value for the attribute that you choose in Compare to Attribute when you create the pricing rule.
Allow Null	Leave empty If you add a check mark, then Pricing does not require the user to provide a value for this attribute at run time. It allows an empty value or the string Null in the database.
Null is Wildcard	Leave empty. If you add a check mark, then Pricing allows the user to provide any value for this attribute at run time. If you add a check mark, to Allow Null and to Null is Wildcard, the Pricing will allow any null value, or any value.

7. In the row you just added, in the Domain column, click **Edit Domain**.
8. In the Edit Column Domain Values dialog, set the following values.

Attribute	Value
Domain Type	Custom For details, see the Setting the Domain of a Result Column section of this topic.
Data Type	Text
Default Value	For this example, enter West. You can specify the value that Pricing displays in the Condition column in the Pricing Administration work area, by default.
Default Is Fixed Value	For this example, leave empty.

Attribute	Value
	If you add a check mark, then Pricing will not allow the administrator to modify the default value.

9. Click **Add Row** four times, and then add the following values.

Domain Value	Display Value
100	North
200	South
300	East
400	West

10. Set the following value, click **OK**, and then click **Save**.

Attribute	Value
Default Value	100 This attribute sets the value that Pricing displays in the Geography condition column so that it defaults to North.

Test Your Work

Test your work:

1. Create a price list, and add item AS54888 to this list.

   To create this price list, do the work described in Managing Price Lists: Procedure up through the Add an Item to the Price List section, but do not click Approve.
2. On the Edit Price List page, in the AS54888 - Buy - Each Charge area, click the **down arrow** next to Create Charge, and then click **Create Price Adjustment Matrix**.
3. In the Create Price Adjustment Matrix dialog, add a check mark to **Geography ID**, and then click **OK**.
4. In the Sale Price: Price Adjustments area, add the following rows.

Geography ID	Adjustment Type	Adjustment Amount
North	Discount Amount	10
East	Discount Amount	5
West	Discount Amount	15

5. Click **Save**, and then click **Approve**.

Setting the Domain of a Result Column

Pricing uses the value that you set in the Domain column to get the value for each result column. You can choose the following domain types:

Domain Type	Description
Lookup	Get the value from a lookup. For example, to get values for approval status, choose CSD_ APPROVAL_ STATUS.
View Object Query	Get the value from an object that Pricing displays in the Pricing Administration work area.
Custom	Get the value from the configuration that you specify in the Edit Column Domain Values dialog.

If you use View Object Query, then set the following attributes:

Attribute	Description
Domain Type	Choose View Object Query.
Application Module	Choose the part of Pricing that displays the object that contains the value. For example, if the value: • Resides in a pricing matrix, then choose MatrixDomainAM. • Is part of the pricing process, such as a matrix class or pricing algorithm, then choose PricingProcess.
Configuration	If Application Module does not display the value your require, then enter it in the Configuration field.
View Object	Choose the view object that displays the value. For example, to get the value from an object that is part of the pricing strategy, choose PricingStrategyPVO. PricingStrategyPVO displays objects that are part of the following pages: • Manage Customer Pricing Profiles • Manage Pricing Segments • Manage Pricing Strategies • Manage Pricing Strategy Assignments • Manage Currency Conversion Lists
Key Attribute	Choose the attribute that the displays the value that this result column must use. For example, choose OrgId to get the value from the Business Unit attribute of the pricing strategy.
Display Attribute	Specify the display attribute.
View Criteria	Specify the view criteria.
Data Type	Specify the data type.
View Object Bind Variables	Add a join condition that filters the results.

Attribute	Description

You can use View Object Bind Variables to add a join condition. For example, assume you reference a view that displays the following rows:

Row	Attribute X	Attribute Y
1	V1	R1
2	V2	R2
3	V3	R3

You can define a condition: if attribute y equals R1 and R2, then display only rows 1 and 2 in the Pricing Administration work area, such as on a price list.

Related Topics

- Pricing Rules: Explained
- Managing Price Lists: Procedure

Glossary

access set

A group of sales orders that Pricing will process. For example, if you choose Vision Operations Business Unit Set for the access set, then Pricing will only process sales orders that reference the Vision Operations business unit.

accounting method

A set of journal entry rules which determine how a subledger journal entry is created for each event class or event type.

adjustment basis

A calculation that uses the value of a pricing entity, such as list price or installation charge, to calculate an adjustment according to percent. For example, multiply the list price of $500 by an adjustment amount of 10%. For another example, multiply the installation charge of $50 by an adjustment amount of 10%.

assignment matrix

A matrix that allows you to specify the conditions that Oracle Fusion Pricing uses to assign a pricing strategy to a pricing segment.

attribute

The property of a sales order, order line, fulfillment line, or orchestration process. Customer and Ship-To Address are each an example of an attribute of a sales order. Quantity is an example of an attribute of an order line. Actual Start Date is an example of an attribute of an orchestration process. Jeopardy Score is an example of an attribute of a fulfillment line.

business unit

A unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy.

configured item

An item that includes one or more options. A desktop computer where you choose the hard drive, monitor, and mouse is an example of a configured item.

cost element

A cost that you can associate with an item so that you can monitor the cost through the inventory and accounting life cycle. For example, you can monitor the material cost, overhead cost, and tax cost of an item. You can monitor each of these costs as a separate cost element.

cost list

A list of cost charges that you associate with an item.

cost plus pricing

A pricing technique that adds together the costs that you associate with an item, such as material cost, labor cost, and overhead cost, and then adds the sum of these costs to the markup percentage that you specify. It allows you to specify a profit margin so that Pricing can determine the price of the item that it must use to meet the margin.

cost-to-serve

The profitability of a customer account according to the business activities and overhead costs that your company incurs to service this customer.

customer rating

The perceived value of a customer to your business regarding their history, future outlook, relationship with your company, and so on.

customer size

A broad categorization of the size of the customer organization, such as total sales, total profits, total assets, or market value. For example, Small, Medium, or Large.

customer value

The value of a customer to your company, as determined by your company requirements.

declarative environment

A software programming environment that allows you to describe the desired results without having to write software code that includes commands, steps, and statements.

descriptive flexfield

A field that you can use to store custom information.

dynamic matrix class

A predefined set of condition columns and result columns that Oracle Fusion Pricing uses when defining a pricing matrix.

general ledger currency conversion

Converting one currency to another currency in the general ledger, such as converting the Chinese Yuan Renminbi to the United States Dollar. If you define the **from** currency and the **to** currency, then this conversion gets the currency conversion rate from the conversion list that the general ledger references. You can use this conversion only if you install Oracle Financials General Ledger.

import file

A flat file that you use as an interface between your source system and Order Management. You copy source orders into this file, and then use a scheduled process to import orders from the import file into Order Management.

item

A product that resides in the Product master database. Order Management displays items in the Item column when you add an order line to a sales order. For example, items for a company that sells hardware might include nuts, bolts, and screws. Items for a company that sells computers might include hard drives, computer monitors, and desktop computers. Items for a wireless service provider might include service plans, international calling services, and instant messaging services. Items for an insurance company might include an item that applies for a period of time, such as fire insurance coverage.

item validation organization

The inventory organization that order management uses to identify the items that it displays and validates for a business unit. In order management, the inventory organization typically identifies a warehouse.

lookup

A value that an Oracle application displays in a list of values. This list typically that allows the user to choose a single value, such as in a drop-down list. The application uses various logic to search for the lookup values that it displays.

matrix class

A declarative framework that you can use to define the conditions and results that you specify when you add a pricing matrix to a pricing entity.

matrix type code

A unique code that identifies a pricing matrix type.

order import template

A template that you can use to structure your source data so that you can import it into Order Management.

predefined

An object, integration, or configuration that comes already defined with an Oracle application and is ready to use with little or no modification.

price breakdown

The separation of a total price into separate price elements. For example, Pay Now is a total price, and total list price, discount, total net price, shipping, total tax, and total credit are each a separate price element.

price element

A pricing entity that Oracle Fusion Pricing uses to calculate price. List price, net price, and profit margin are each an example of a pricing entity.

price list

A collection of prices for items that you target for a set of customers, and for a period of time. It allows you to capture the base list price and other adjustments for each item.

price periodicity

A charge that occurs for an item according to a period of time that recurs on a regular basis, such as day, month, or year.

pricing algorithm

A procedure that uses conditional logic, variables, and functions to manipulate data in a service data object (SDO). For example, adding a value to the Quantity attribute in this SDO.

pricing charge

The value that Oracle Fusion Pricing calculates for an item or service. An item or service can include one or more pricing charges. For example, an item might include a one-time sale charge, an administration charge, and a handling fee.

pricing charge definition

A definition of the charges that Pricing combines to determine the total price for an item. For example, an item might include multiple charges, such as a one-time sale charge, an administration charge, and a handling fee. The pricing charge definition defines these charges.

pricing entity

An object that stores information that Oracle Fusion Pricing uses to price an item. A pricing strategy, pricing segment, customer pricing profile, price list, cost list, and discount list are each an example of a pricing entity.

pricing matrix

A matrix that allows you to specify the conditions that Oracle Fusion Pricing uses to assign a pricing profile to a pricing strategy according to the pricing segment. You can use a pricing matrix to define and apply business rules that help you achieve profitability.

pricing message

A text message that describes each price element that Order Management Cloud displays in the Total dialog, such as Total List Price, Discount, Shipping, Total Tax, and so on. A pricing message can also describe the reason for a sale price violation, how Oracle Fusion Pricing determines a pricing segment, or how it determines a pricing strategy.

pricing objective

The goal of your pricing policies for a customer, such as to create interest about your items, to increase sales volume, or to maintain a market position that you have already established.

pricing precedence

The sequential order that Pricing uses when it compares price lists, discount lists, cost lists, or currency conversion lists. For example, Pricing compares the pricing profile to each row of a pricing segment matrix until it finds a match. If more than one row matches, then Pricing uses the row that contains the lowest value in the Precedence. For example, if the first and second row match, and if the first row contains a precedence of 1, and if the second row contains a precedence of 2, then Pricing uses the first row.

pricing process assignment

A mapping that specifies the pricing algorithm to run that meets the needs of a pricing operation.

pricing profile

A description that categorizes customers according to common characteristics, such as revenue potential, customer value, size, rating, or cost to serve.

pricing results presentation

A template that specifies how to display each price element in a price breakdown.

pricing rule

A statement that controls how Pricing applies a price adjustment on an item. For example, how to apply a discount on the list price of an item.

pricing segment

A group of customers who exhibit similar buying behavior and who react to a pricing strategy in a similar way.

pricing strategy

A set of pricing rules that you can define to achieve a profitability goal for selling and pricing an item.

pricing strategy assignment

An array that associates a pricing segment and condition with a pricing strategy.

profit margin

The price of an item minus the cost that your company incurs to make and sell the item.

revenue potential

The potential revenue that a customer might create for your company. For example, Very High, High, Medium, or Low.

rounding rule

A logical rule that Oracle Fusion Pricing uses to replace a numerical value with some other value that is shorter, simpler, or more explicit.

sales order

A contractual document between a sales organization and their customer to deliver items. It might reference a customer purchase order.

scheduled process

A program that you run to process data and, in some cases, generate output as a report.

segment price list

A price list that includes the base prices for each item that a pricing segment references.

service data object

A data structure that does not conform to a single programming language. It facilitates communication between applications. It allows a service to call another service without having to conform to the requirements of a single language. A service data object typically includes elements arranged in a tree structure that includes a root and branches, and it allows the calling service to access the data that these elements reference.

service mapping

A pricing entity that specifies a group of entities and attributes that a service can retrieve and update. You can use it to model entities and attributes in a declarative environment without having to write software code. The service mapping allows an application, such as Order Management Cloud, to price an item without having to get the pricing schema that Pricing requires.

tier basis

A calculation that uses the value of a pricing entity, such as list price or installation charge, to calculate an adjustment according to amount. For example, if a one-time sale charge is greater than $2,000, then apply a 10% discount on the base price.

tier pricing

A technique that uses tiers to adjust price depending on the quantity of items that the customer orders or the monetary value of the sales order. For example, if the customer buys two desktop computers, then use tier 1 to apply a 10% discount, and if the customer buys four desktop computers, then use tier 2 to apply a 15% discount.

token

A placeholder for variable content, such as text or numbers. An application replaces the token with a value at run time. Consider the following example, where COST_ELEMENT_NAME is the token: The {COST_ELEMENT_NAME} is less than the floor price. The application uses internal logic to translate this sentence at run time: The list price is less than the floor price.

usage charge

A charge according to usage, such as a charge for each phone call.