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# PeopleSoft Enterprise Pricer 8.9 PeopleBook

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**June 2004**

## PeopleSoft Enterprise Pricer 8.9 PeopleBook

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# Contents

**General Preface**

**About This PeopleBook .....vii**

PeopleSoft Application Prerequisites.....vii

PeopleSoft Application Fundamentals.....vii

Related Documentation.....viii

    Obtaining Documentation Updates.....viii

    Ordering Printed Documentation.....viii

Typographical Conventions and Visual Cues.....ix

    Typographical Conventions.....ix

    Visual Cues.....x

    Country, Region, and Industry Identifiers.....x

    Currency Codes.....xi

Comments and Suggestions.....xi

Common Elements in These PeopleBooks .....xi

**Preface**

**PeopleSoft 8.9 Enterprise Pricer for CRM Preface.....xiii**

PeopleSoft Application Fundamentals.....xiii

PeopleSoft CRM Automation and Configuration Tools.....xiii

**Chapter 1**

**Getting Started with PeopleSoft Enterprise Pricer.....1**

Understanding PeopleSoft Enterprise Pricer.....1

Implementing PeopleSoft Enterprise Pricer.....2

**Chapter 2**

**Implementing PeopleSoft Enterprise Pricer.....3**

Establishing Price-By Key and Price-List Fields.....3

    Understanding PeopleSoft Enterprise Pricer Setup.....3

    Common Element Used in This Section.....4

    Pages Used to Establish Price-by Key and Price-List Fields.....4

    Defining Price-by Keys.....4

    Defining Price List Fields.....6

Configuring PeopleSoft Enterprise Pricer.....	8
Pages Used to Configure PeopleSoft Enterprise Pricer.....	8
Configuring Price-by Key Fields.....	8
Configuring Application Code Options.....	9
Adding Additional Price by Key Fields.....	14

## Chapter 3

<b>Creating Price Lists.....</b>	<b>17</b>
Understanding Price Lists.....	17
Setting Up Price Lists.....	17
Common Elements Used in This Section.....	18
Pages Used to Set Up Price Lists.....	18
Establishing Price Lists.....	18
Entering Related Objects.....	20

## Chapter 4

<b>Creating Price Rules.....</b>	<b>23</b>
Understanding Price Rules.....	23
Setting Up Price Rules.....	23
Pages Used to Set Up Price Rules.....	23
Establishing Price Rule Conditions.....	23
Establishing Price Rule Formulas.....	28

## Chapter 5

<b>Using the Arbitration Plan.....</b>	<b>35</b>
Understanding Arbitration Plans.....	35
Setting Up an Arbitration Plan.....	38
Pages Used to Set Up Arbitration Plans.....	38
Setting Up an Arbitration Plan.....	39

## Chapter 6

<b>Working With the Pricing Simulator.....</b>	<b>43</b>
Understanding the Pricing Simulator.....	43
Running the Pricing Simulator.....	43
Pages Used to Run the Pricing Simulator.....	44
Running the Pricing Simulator.....	44

Updating Line Level Pricing Keys in the Simulation.....47

**Appendix A**  
**ISO Country and Currency Codes.....49**  
ISO Country Codes.....49  
ISO Currency Codes.....58

**Glossary of PeopleSoft Terms.....69**

**Index .....85**



# About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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**Note.** PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

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## PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

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## PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

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## Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

### Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

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**Important!** Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

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#### See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

### Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

#### Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

#### Telephone

Contact MMA Partners at 877 588 2525.

#### Email

Send email to MMA Partners at [peoplesoftpress@mmapartner.com](mailto:peoplesoftpress@mmapartner.com).

#### See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>



## Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

### Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
<b>Bold</b>	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.  We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( ).

Typographical Convention or Visual Cue	Description
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>

## Visual Cues

PeopleBooks contain the following visual cues.

### Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

---

**Note.** Example of a note.

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If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

---

**Important!** Example of an important note.

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### Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

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**Warning!** Example of a warning.

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### Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

## Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

### Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

See *About These PeopleBooks*, “ISO Country and Currency Codes,” ISO Country Codes.

## Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

## Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

## Currency Codes

Monetary amounts are identified by the ISO currency code.

See Appendix A, “ISO Country and Currency Codes,” ISO Currency Codes.

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## Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to [doc@peoplesoft.com](mailto:doc@peoplesoft.com).

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

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## Common Elements in These PeopleBooks

<b>As of Date</b>	The last date for which a report or process includes data.
<b>Business Unit</b>	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
<b>Description</b>	Enter up to 30 characters of text.
<b>Effective Date</b>	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when

you can view and change the information. Pages or panels and batch processes that use the information use the current row.

**Once, Always, and Don't Run**

Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

**Report Manager**

Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

**Process Monitor**

Click to access the Process List page, where you can view the status of submitted process requests.

**Run**

Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

**Request ID**

An ID that represents a set of selection criteria for a report or process.

**User ID**

An ID that represents the person who generates a transaction.

**SetID**

An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.

**Short Description**

Enter up to 15 characters of text.

# PeopleSoft 8.9 Enterprise Pricer for CRM Preface

This preface discusses:

- PeopleSoft CRM application fundamentals.
- PeopleSoft CRM automation and configuration tools.

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**Note.** All information found in this PeopleBook is applicable to PeopleSoft CRM for High Technology.

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## PeopleSoft Application Fundamentals

The *PeopleSoft 8.9 Enterprise Pricer for CRM PeopleBook* provides implementation and processing information for your PeopleSoft Enterprise Pricer for CRM application. However, additional essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft 8.9 CRM Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

*PeopleSoft 8.9 CRM Application Fundamentals PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the CRM product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire PeopleSoft CRM system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

### See Also

*PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*

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## PeopleSoft CRM Automation and Configuration Tools

The *PeopleSoft 8.9 CRM Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application PeopleBook.

There are three parts to the *PeopleSoft 8.9 CRM Automation and Configuration Tools PeopleBook*:

- Correspondence management.

This part discusses manual notifications and correspondence requests.

- Automation tools.

This part discusses PeopleSoft CRM workflow, component event processing, business projects, and scripts.

- Configuration tools.

This part discusses configurable search pages, configurable toolbars, attributes, and industry-specific field labels and field values.

## **See Also**

*PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*

# CHAPTER 1

## Getting Started with PeopleSoft Enterprise Pricer

This chapter provides an overview and discusses the steps to implement PeopleSoft Enterprise Pricer.

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### Understanding PeopleSoft Enterprise Pricer

PeopleSoft Enterprise Pricer enables real-time dynamic pricing for quotes and orders based on your company pricing policies. You can define rules that determine what discounts, surcharges, or giveaways apply under specific order conditions such as products ordered, customer, customer region, and so on. The functionality is designed for pricing and marketing managers and includes the capability for development, testing, deployment, and maintenance of price lists, rules, and arbitration plans.

PeopleSoft Enterprise Pricer consists of pricing elements that you use to create your pricing structure:

- Price lists.

These enable you to select products and conditions where the price list should be overridden. During a transaction, the system either determines the product price based on your predefined search hierarchy for the transaction or the product's lowest price on any associated active price lists. This price is used as the basis for any further discounts and surcharges.

- Price rules.

These define the conditions that must be met in order for the adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

- Arbitration plans.

These define how the price rules are to be applied to the base price when the transaction is priced.

- Pricing simulator.

This enables you to test your pricing scenarios to determine whether the pricing adjustments create the desired results.

When you set up your pricing scenario, set up the pricing elements in this order:

1. Price lists.
2. Price rules.
3. Arbitration plans.

Once all three elements have been set up, you can test the pricing elements using the pricing simulator.

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**Note.** Enterprise Pricer does not implement business unit or setID security.

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## Integrating With PeopleSoft Enterprise Pricer

PeopleSoft Enterprise Pricer integrates with these PeopleSoft applications:

- PeopleSoft CRM Order Capture.
- PeopleSoft CRM Order Capture Self Service.
- PeopleSoft CRM Mobile Order Capture.
- PeopleSoft CRM Marketing offers.

See *PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook*.

See *PeopleSoft Enterprise CRM 8.9 Mobile Applications PeopleBook*.

See *PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook*.

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## Implementing PeopleSoft Enterprise Pricer

PeopleSoft Enterprise Pricer does not require table-loading implementation steps. In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface of this PeopleBook, with information about where to find the most current version of each.

See “PeopleSoft 8.9 Enterprise Pricer for CRM Preface,” page xiii.



## CHAPTER 2

# Implementing PeopleSoft Enterprise Pricer

The section provides an overview of PeopleSoft Enterprise Pricer and discusses how to:

- Establish price-by key and price-list fields.
- Configure PeopleSoft Enterprise Pricer.
- Add additional price-by fields.

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## Establishing Price-By Key and Price-List Fields

The section provides an overview of PeopleSoft Enterprise Pricer setup and discusses how to:

- Define Price-by Keys.
- Define price list fields.

## Understanding PeopleSoft Enterprise Pricer Setup

When setting up PeopleSoft Enterprise Pricer, you must establish price-by key fields and price-list fields for each transaction to be priced. The person who administers PeopleSoft Enterprise Pricer should set these up when you are implementing the application. These pages won't be accessed again; however, it's important that you understand how these pages are used to create your pricing structure.

Price lists are groups of date-controlled product prices that are defined by currency code and linked to related business objects or price rules. These product prices are intended to replace the product list price when they are associated with a transaction by way of the related business objects or price rules.

Price list related business objects are objects to which a price list can be associated. The business objects are a subset of price-by fields that are already defined for the transaction. A price list can have more than one related business object, such as customer, customer group, product ID, and business unit. The system uses the appropriate pricing transaction to determine the available price list related business objects.

The system attempts to match a particular transaction to one or more price lists based on the transaction values and the price list related business objects. For example, if you are taking an order for customer ABC and customer ABC is defined as a related business object for a specific price list, that price list applies to this order. Furthermore, if any product on the order appears on this price list, the price from the price list is used as the base price for all further pricing calculations, instead of the product's list price. If more than one applicable list is found, the price list lookup that is defined for that transaction on the Price By Key Field page determines which price is used:

- Lookup in priority order.

The system performs a search to match the related business objects in the defined priority order and then selects the first list price that it finds.

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**Note.** This option is used in PeopleSoft Customer Relationship Management (PeopleSoft CRM).

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- Consider all prices

The system performs a search to match the related business objects and their price lists and then selects the lowest price. This option is used in PeopleSoft Supply Chain Management (PeopleSoft SCM).

The Transaction Price-by Keys page is used to define the fields used to match a transaction. At implementation time, select from the delivered list of price-by keys for each transaction.

The list of price-by keys can be expanded if PeopleSoft Enterprise Pricer is configured. Any configuration should be completed by a knowledgeable PeopleSoft application developer or IT person.

## Common Element Used in This Section

### Transaction to be Priced

Determines the appropriate list of price-by keys to use to price transactions. Values are:

*BA (Buying Agreement):* Used to price PeopleSoft Order Management buying agreement transactions.

*OC (Order Capture):* Used to price PeopleSoft Order Capture transactions.

*SO (Sales Order):* Used to price PeopleSoft Order Management online sales order transactions.

*SOBT (Sales Order Batch):* Used to price PeopleSoft Order Management batch process sales order transactions.

## Pages Used to Establish Price-by Key and Price-List Fields




Page Name	Object Name	Navigation	Usage
Price-by Key Field	EOEP_APPKEY_FIELD	Setup CRM, Product Related, Enterprise Pricer, Transaction Price-by Keys, Price-by Key Field	Use to select the price-by fields that can be used to price the transaction.
Price List Fields	EOEP_APPLIST_FLDS	Setup CRM, Product Related, Enterprise Pricer, Transaction Price-by Keys, Price List Fields	Use to select valid price-list-related business objects that are used when creating price lists.

## Defining Price-by Keys

Access the Price-by Key Field page.

Price-by Key Field		Price List Fields	
<u>Transaction</u>		<u>Description</u>	
OC		Order Capture	
<b>Price-by Key Fields</b> <a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a> <span>First</span> <span>1-20 of 22</span> <span>Last</span>			
Record	Field Name	Description	Prompt Table
RB_PRC_DERIVED	BO_ID_PARTNER	BO ID Partner	RO_PK_PB0ID_VW
RB_PRC_DERIVED	BO_ID_SOLD	Sold To Business Object ID	RO_PK_BO_VW
RB_PRC_DERIVED	CUSTOMER_GROUP	Customer Group	RO_PK_CUSTGP_VW
RB_PRC_DERIVED	INV_ITEM_ID	Item ID	RO_PK_ITEM_VW
RB_PRC_DERIVED	PARTNER_LEVEL	Partner Level	RO_PK_PLVEL_VW
RB_PRC_DERIVED	PARTNER_PGM_ID	Partner Program ID	RO_PK_PPGM_VW
RB_PRC_DERIVED	PARTNER_SUBTYPE	Partner Subtype	RO_PK_PSUB_VW
RB_PRC_DERIVED	PARTNER_TYPE	Partner Type	RO_PK_PTYPE_VW
RB_PRC_DERIVED	POSTAL	Postal Code	
RB_PRC_DERIVED	PROD_COMPONENT_ID	Product Component ID	RO_PK_COMP_VW
RB_PRC_DERIVED	PRODUCT_GROUP	Product Group	RO_PK_PGRP_VW
RB_PRC_DERIVED	RA_OFFER_ID	Offer ID	RO_PK_OFFER_VW
RB_PRC_DERIVED	RBTACTION_CODE	Action Code	RO_ACTION_VW
RB_PRC_DERIVED	REGION_ID	Region ID	RO_PK_REGN_VW
RB_PRC_DERIVED	SHIP_TO_CUST_ID	Ship To Customer	RO_PK_SHIPTO_VW
RB_PRC_DERIVED	SOLD_TO_CUST_ID	Sold To Customer	RO_PK_SOLDTO_VW
RO_HEADER_SBR	BUSINESS_UNIT	Business Unit	RO_PK_BU_VW
RO_HEADER_SBR	PAYMENT_METHOD	Payment Method	RO_PK_METHOD_VW
RO_HEADER_SBR	PYMNT_TERMS_CD	Payment Terms ID	RO_PK_TERMS_VW
RO_HEADER_SBR	RESELL_FLAG	Products Are For Resell	RO_PK_RESELL_VW
Build Price-by Key Fields			

Price-by Key Field page (1 of 2)

▼ Select Price-by Key Fields				Customize   Find   View All   	First  1-20 of 22  Last
Select	Record	Field Name	Description		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	BO_ID_PARTNER	BO ID Partner		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	BO_ID_SOLD	Sold To Business Object ID		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	CUSTOMER_GROUP	Customer Group		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	INV_ITEM_ID	Item ID		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	PARTNER_LEVEL	Partner Level		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	PARTNER_PGM_ID	Partner Program ID		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	PARTNER_SUBTYPE	Partner Subtype		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	PARTNER_TYPE	Partner Type		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	POSTAL	Postal Code		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	PROD_COMPONENT_ID	Product Component ID		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	PRODUCT_GROUP	Product Group		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	RA_OFFER_ID	Offer ID		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	RBTACTION_CODE	Action Code		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	REGION_ID	Region ID		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	SHIP_TO_CUST_ID	Ship To Customer		
<input checked="" type="checkbox"/>	RB_PRC_DERIVED	SOLD_TO_CUST_ID	Sold To Customer		
<input checked="" type="checkbox"/>	RO_HEADER_SBR	BUSINESS_UNIT	Business Unit		
<input checked="" type="checkbox"/>	RO_HEADER_SBR	PAYMENT_METHOD	Payment Method		
<input checked="" type="checkbox"/>	RO_HEADER_SBR	PYMNT_TERMS_CD	Payment Terms ID		
<input checked="" type="checkbox"/>	RO_HEADER_SBR	RESELL_FLAG	Products Are For Resell		

Price-by Key Field page (2 of 2)

**Price-by Key Fields**

Displays the current price-by fields for the transaction.

**Build Price-by Key Fields**

Click to add fields to the Price-by Key Fields grid after selecting them from Select Price-by Key Fields grid.

---

**Note.** If a price-by field is currently assigned to a price rule or an arbitration plan, you cannot remove it from the list of values assigned to the pricing transaction.

---

**Select Price-by Key Fields**

Use to select additional price-by fields.

---

**Note.** There is no limit to the number of pricing keys that can be defined; however, performance can be impacted when the number of keys is increased.

---

## Defining Price List Fields

Access the Price List Fields page.

Price List Fields page

**Price List Lookup**

Select how you want the system to perform price list lookup. Values are:

*Consider all prices:* The system considers all matching price lists based on the related business objects and price rules that you have attached to the price lists. It then selects the lowest price for the product.

*Lookup in priority order:* The system establishes the order for the price list lookup based on the values in the Price-by Key Fieldnames Priority section. Use this method to establish a hierarchical method for selecting the list price for the transaction.

---

**Note.** When using the hierarchical method, price rules tied to price lists are not used unless a price could not be found using the hierarchical method.

---

**Key Field Code**

Select price-by keys to define the valid related business objects for a price list. These are the values available to you as related business objects on the Price List Related Object page.

**Priority**

Establish a hierarchical order to price list lookups by entering a numeric value. This field is available only if you select *Lookup in priority order* in the Price List Lookup field.

## Configuring PeopleSoft Enterprise Pricer

The general PeopleSoft Enterprise Pricer user should not have access to these pages. These pages are available to the PeopleSoft Enterprise Pricer developer to modify or configure the PeopleSoft Enterprise Pricer system data. You can configure the PeopleSoft Enterprise Pricer data entry pages, but this is not required for a standard implementation of PeopleSoft Enterprise Pricer. The system data described in this section are delivered for each pricing transaction implementation.

This section discusses how to:

- Configure price-by key fields.
- Configure transaction code options.

---

**Warning!** Changes made to the pages in this section are considered a configuration and are not supported by PeopleSoft.


---

### Pages Used to Configure PeopleSoft Enterprise Pricer

Page Name	Object Name	Navigation	Usage
All Price-by Key Fields	EOEP_KEYFLDS	Setup CRM, Product Related, Enterprise Pricer, All Price-by Key Fieldnames, Price-by Keyfields	Select fields to use as price-by key fields for all PeopleSoft Enterprise Pricer implementations. The values are delivered as system data during installation.
Price Transaction Code	EOEP_APP_CODE	Setup CRM, Product Related, Enterprise Pricer, Price Transaction Code, Application Code	Configure the PeopleSoft Enterprise Pricer data entry pages for each application code and relate the transaction to another transaction.

### Configuring Price-by Key Fields

Access the All Price-by Key Fields page.

Price-by Keyfields				
All Price-by Key Fields			Customize   Find   View All   	
*Record	*Field Name	Description	First	Last
RB_PRC_DERIVED	BO_ID_PARTNER	BO ID Partner	1-20 of 22	
RB_PRC_DERIVED	BO_ID_SOLD	Sold To Business Object ID		
RB_PRC_DERIVED	CUSTOMER_GROUP	Customer Group		
RB_PRC_DERIVED	INV_ITEM_ID	Item ID		
RB_PRC_DERIVED	PARTNER_LEVEL	Partner Level		
RB_PRC_DERIVED	PARTNER_PGM_ID	Partner Program ID		
RB_PRC_DERIVED	PARTNER_SUBTYPE	Partner Subtype		
RB_PRC_DERIVED	PARTNER_TYPE	Partner Type		
RB_PRC_DERIVED	POSTAL	Postal Code		
RB_PRC_DERIVED	PROD_COMPONENT_ID	Product Component ID		
RB_PRC_DERIVED	PRODUCT_GROUP	Product Group		
RB_PRC_DERIVED	RA_OFFER_ID	Offer ID		
RB_PRC_DERIVED	RBT ACTION_CODE	Action Code		

Price-by Keyfields page

There may be instances when you must add additional price-by key fields that aren't available on this page.

See *PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook*, "Understanding Product, Pricing, and Catalog Setup".

---

**Note.** Adding data here is considered a configuration.

---

**Record** Select the record for the price-by key fields and select a corresponding Field Name for the Price-by Key field.

## Configuring Application Code Options

The options for each transaction are delivered as system-data and appear on the online pricing pages. They also determine how PeopleSoft Enterprise Pricer can be used to price each transaction.

Access the Application Code page.

**Application Code**

Transaction	*Description	Parent
OC	Order Capture	

▼ **Valid Action Types** [Customize](#) | [Find](#) | [View All](#) | First 1-9 of 9 Last

Action Type		
Discount/Surcharge	+	-
Free Period Promotion	+	-
Product Add	+	-
Price Override	+	-
Giveaway	+	-
Total Order Discount/Surcharge	+	-
Min/Max Target Price	+	-
Min/Max Target Discount	+	-
Min/Max Target Surcharge	+	-

▼ **Valid Adjustment Methods** [Customize](#) | [Find](#) | [View All](#) | First 1-2 of 2 Last

Adjustment Method		
Cascading	+	-
Summed	+	-

Application Code page (1 of 2)

▼ **Valid Price Types** [Customize](#) | [Find](#) | [View All](#) | First 1-2 of 2 Last

Price Type		
Extended Price	+	-
Quantity	+	-

▼ **Transaction Code Options** [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Options		
	+	-

▼ **Valid Price Dates** [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Price Date		
	+	-

Application Code page (2 of 2)

The options for each transaction are delivered as system-data and appear on the Price Rule Formulas page. This table lists the options set up for each transaction.



	<b>Buying Agreement</b>	<b>Order Capture</b>	<b>Sales Order</b>	<b>Sales Order Batch</b>
Price Action Type	<b>Note.</b> Inherits all options from the SO transaction.	<ul style="list-style-type: none"> <li>• Discount /Surcharge</li> <li>• Giveaway</li> <li>• Min/Max Target Discount</li> <li>• Min/Max Target Price</li> <li>• Min/Max Target Surcharge</li> <li>• Price Override</li> <li>• Total Order Discount /Surcharge</li> <li>• Product Add</li> <li>• Free Period Promotion</li> </ul>	<ul style="list-style-type: none"> <li>• Discount /Surcharge</li> <li>• Giveaway</li> <li>• Min/Max Target Discount</li> <li>• Min/Max Target Price</li> <li>• Min/Max Target Surcharge</li> <li>• Price Override</li> <li>• Total Order Discount /Surcharge</li> <li>• Product Add</li> <li>• Free Period Promotion</li> </ul>	<b>Note.</b> Inherits all options from the SO transaction.
Price Type		<ul style="list-style-type: none"> <li>• Extended Price</li> <li>• Quantity</li> </ul>	<ul style="list-style-type: none"> <li>• Extended Price</li> <li>• Quantity</li> <li>• Volume</li> <li>• Weight</li> </ul>	
Cascading/Summed		Yes Options include: <ul style="list-style-type: none"> <li>• Cascading</li> <li>• Summed</li> </ul>	Yes Options include: <ul style="list-style-type: none"> <li>• Cascading</li> <li>• Summed</li> </ul>	
Promotion Code		No	Yes  Populated if PeopleSoft Promotion Management is installed.	
Use Grace Days Use Grace Days		No	Yes	

	<b>Buying Agreement</b>	<b>Order Capture</b>	<b>Sales Order</b>	<b>Sales Order Batch</b>
Merchandising Type		No	Yes  Populated if PeopleSoft Promotion Management is installed.	
Period-to-Date		Not applicable	Yes	
Stop Processing Here		Yes  Options include: • Yes • No	Yes  Options include: • Yes • No	
Distribution Accounts		No	Yes	
Payment Terms		No	Yes	
Price Dates		No	Yes  Options include: • Requested Arrival Date • Order Date • Schedule Ship Date	

**Parent**

Select a value if you want the transaction to inherit all of the attributes and price-by keys of the parent.

**Action Types**

Select valid price action types for the transaction and limit the available options during price rule and arbitration plan entry. The values that you select are available for the price rule price action type. Values are:

*Discount/Surcharge:* Applies a discount or surcharge to the line.

*Free Period Promotion:* Allows a certain number of periods of a recurring price to be free. The period used is what appears on the order. For example, if you select three free periods here and the rule is used on an order with a cell phone for \$30/month, then the first three months are free.

*Product Add:* Adds a product to the order, such as a cancellation penalty product.

*Giveaway:* Adds a free product to the line or order.

*Min/Max Target Discount:* Compares the total discount adjustment and if outside the limits, discards the calculated amount and replaces it with the target discount.

*Min/Max Target Price:* Compares the price adjustment and if outside the specified range, discards the calculated amount and replaces it with the target amount.

*Min/Max Surcharge:* Compares the total surcharge adjustment and if outside the specified range, applies a target surcharge.

*Price Override:* Replaces the price on a product with this price

*Total Order Discount/Surcharge:* Applies a discount or surcharge to the entire order.

## Price Type

The values that you select here are available when you select the price rule price type. Values applicable to CRM are:

*Extended Price:*

and

*Quantity:*

## Options

The values that you select here cause the system to display the appropriate processing fields on the price rule pages. Values are:

*Use Payment Terms on Formula:* Select the payment for each adjustment from the list of values on the Payment Terms page in PeopleSoft Billing that has the longest day or month increment. If the order or schedule has more than one price rule with a payment term that qualifies for the order, the system selects the most favorable terms for the customer.

*Use Period-to-date:* Enables the system to use period-to-date pricing to calculate price adjustments based on transactions across a predefined time frame, rather than individual transactions.

*Use Promotion Code:* Use if PeopleSoft Promotions Management is installed and you want to tie promotions on the price rule.

*Use Rule Distribution Accounts:* View and create accounting distribution details for the adjustments on the price rule.

---

**Note.** These values are not applicable to PeopleSoft CRM.

---

## Price Date

Select the dates available to price the transaction from the available options:

*Order Date:* The date the order header is created. The system uses the current date as the default date on a sales order header, but you can enter another date.

*Requested Arrival Date:* The date your customer wants the order to arrive at their site. This option is used only by PeopleSoft SCM installations.

*Schedule Ship Date:* The date the order line is scheduled to ship. The system calculates this date from the requested arrival date, using the transit lead time and exception ship dates, but you can enter another date. This option is used only by PeopleSoft Supply Chain Management installations.

---

**Note.** These values are not applicable to PeopleSoft CRM.

---

## Adding Additional Price by Key Fields

There may be instances where you need to add additional price by keys that those delivered with the system data and those you can add using the All Price-by Key Fields page. The steps below show how you would add item weight, as an example. You can follow the same steps to add other fields.

---

**Note.** Keep in mind that adding additional price by key fields is considered a customization.

---

To add item weight as a pricing key to PeopleSoft Enterprise Pricer:

1. Add the INV\_ITEM\_UOM record and the SHIPPING\_WEIGHT field on the All Price-by Key Fields page to add shipping weight as a price-by key field.
2. Assign the new SHIPPING\_WEIGHT field to the transaction code that you are using on the Price-by Key Field page.

Select the new SHIPPING\_WEIGHT field from the list at the bottom of the page. Click the Build Price-by key fields button to tie the new field to the transaction code.

3. If the new field requires a prompt table to prompt for valid values when the pricing key is used on the price rule, create a view and assign the prompt table to the pricing key on the Price-by Key Field page. This is the same page you used in step 2.

If no prompt table is assigned to a pricing key, any value can be entered on the price rule for that field.

In addition, the PeopleCode may need to be modified to recognize the new pricing key. When a new pricing key is added to the list of available keys and it is assigned to a transaction code, it may require a change to the PeopleCode method used to pass a value to that new pricing key. The following method in PeopleSoft CRM contains the logic used to pass a value for each pricing key defined for the Order Capture transaction code. If a new pricing key is added to the transaction code, the following PeopleCode program should be reviewed to make sure that the pricing key will be used by the system:

- Application Package: RB\_PRICER:PricingUtil:InputList
- Method:CreatePricingKeysLocal( )

This method is used to assign a value from PeopleSoft Order Capture to each pricing key defined for the Order Capture transaction code. If multiple pricing keys are defined for the same record, the PeopleCode can be modified only once and any field from that record can then be selected as a pricing key without having to modify the code afterwards. The code in CreatePricingKeysLocal( ) can be modified to handle all the fields from a specific record without having to specify the fieldname.

In other cases, the value for a field will require more logic to determine what value should be assigned to the pricing key. If a new record, for which all the fields can be used as pricing keys needs to be added to the PeopleCode, the same logic can be used and a new condition needs to be added to the Evaluate. For example, if multiple fields from record INV\_ITEM\_UOM need to be added to list of pricing keys, the following condition can be added.

```
When Record.INV_ITEM_UOM
    &recItemUom = createrecord(RECORD.INV_ITEM_UOM);
    &recItemUom.SETID.value = %Super.ProductSetid;
    &recItemUom.INV_ITEM_ID.value = %This.GetInvItemId(&recLine.PRODUCT⇒
ID.Value);

    &recItemUom.UNIT_OF_MEASURE.value = &recLine.UNIT_OF_MEASURE.value;    ⇒

    &recItemUom.SelectByKey();
```

```

    &strValue = &recItemUom.GetField(@"FIELD." | &strFieldname)).Value;
    Break;

```

The PeopleCode can be added once and any field from record INV\_ITEM\_UOM can then be used as a pricing key.

The following example shows the code needed when more logic is needed in order to determine the value for a specific pricing key. When the pricing key is INV\_ITEM\_UOM.SHIPPING\_WEIGHT, the method `GetWeight( )` can be executed to calculate the weight for the item.

```

When Record.INV_ITEM_UOM
    Evaluate &strFieldname
    When Field.SHIPPING_WEIGHT
        &strValue = %This.GetWeight(&recLine.PRODUCT_ID.value, &recLine.UNIT_⇒
OF_MEASURE.value);
    Break;

```

The entire existing and new code for the customization would be as follows:

```

rem =====
rem Method:          CreatePricingKeysLocal
rem
rem Description:    Pass the pricing key information to the engine.
rem =====;
method CreatePricingKeysLocal
    /* &objLine as EOEP_PRICER:DataStructure:Line, */
    /* &recLine as Record */
    Local integer &iCount, &iCount2;
    Local Record &recAppkeyFld, &recDestination;
    Local string &strFieldname, &strValue, &strVoid;
    Local number &numBO, &numShipToBoid, &numProfileSeq;
    Local boolean &bRetVal;
    Local RO_CAPTURE:BusinessLogic:Records:Destination &objDestination;
    Local array of string &arrReturn;

    For &iCount = 1 To &c_rsPricingKeys.ActiveRowCount
        &recAppkeyFld = (&c_rsPricingKeys)(&iCount).PW_PRCKEY_VW;
        &strFieldname = &recAppkeyFld.FIELDNAME.Value;
        &strValue = "";

        When Record.RO_HEADER
            rem -----;
            rem Copy key value from header                                     ;
            rem -----;
            &strValue = %Super.HeaderRec.GetField(@"FIELD." | &strFieldname)).Value;
            Break;

        When Record.INV_ITEM_UOM
            rem -----;
            rem Copy key value from Inventory Item UOM                       ;
            rem -----;

```

```

        &recItemUom = createrecord(RECORD.INV_ITEM_UOM);
        &recItemUom.SETID.value = %Super.ProductSetid;
        &recItemUom.INV_ITEM_ID.value = %This.GetInvItemId(&recLine.PRODUCT_⇒
ID.Value);
        &recItemUom.UNIT_OF_MEASURE.value = &recLine.UNIT_OF_MEASURE.value;      ⇒

        &recItemUom.SelectByKey();
        &strValue = &recItemUom.GetField(@"FIELD." | &strFieldname)).Value;
        Break;

        .
        .
        .

    End-Evaluate;

    If &strValue <> "" Then
        %This.AddPricingKey(&objLine, &recAppkeyFld.EOEP_KEY_FLD_CD.Value, &str⇒
Value);
    End-If;
End-For;

```

The new code for the customization to retrieve values from the table and pass them to the pricing engine is as follows:

```

When Record.INV_ITEM_UOM
    rem -----;
    rem Copy key value from Inventory Item UOM                ;
    rem -----;
    &recItemUom = createrecord(RECORD.INV_ITEM_UOM);
    &recItemUom.SETID.value = %Super.ProductSetid;
    &recItemUom.INV_ITEM_ID.value = %This.GetInvItemId(&recLine.PRODUCT_⇒
ID.Value);
    &recItemUom.UNIT_OF_MEASURE.value = &recLine.UNIT_OF_MEASURE.value;      ⇒

    &recItemUom.SelectByKey();
    &strValue = &recItemUom.GetField(@"FIELD." | &strFieldname)).Value;
    Break;

    .
    .
    .

End-Evaluate;

```

## CHAPTER 3

# Creating Price Lists

This section provides an overview of price lists and discusses how to set up price lists.

---

## Understanding Price Lists

Price lists are groups of date-controlled product prices that are defined by currency code and linked to related business objects existing price rules. These product prices are intended to replace the product list price when they are associated with a transaction via the related business objects or price rules.

Price-list related business objects are a subset of the existing transaction price-by fields. They are used to define objects, which can be associated with a price list, to look up a list price. A price list can have more than one related business object, such as customer, customer group, product ID, and business unit.

The system uses the appropriate pricing transaction to determine the available price list related business objects. The system attempts to match a particular transaction to one or more price lists based on the transaction values and the price list related business objects. For example, if you are taking an order for customer ABC and customer ABC is defined as a related business object for a specific price list, that price list applies to this order. Furthermore, if any product on the order appears on this price list, the price from the price list is used as the base price for all further pricing calculations, instead of the product's list price. If more than one applicable list is found, the price list lookup defined for that transaction determines which price is used:

- Lookup in priority order.

The system performs a search to match the related business objects in the defined priority order and then selects the first list price it finds.

- Consider all prices.

The system performs a search to match the related business objects and their price lists and then selects the lowest price.

After locating the base price for the product, the system performs a separate search of the price rules to find the appropriate adjustments to that price. If you haven't set up price lists, or the system fails to find the product on an active relevant list, the system uses the list price defined for the product as the default base price for any further price adjustments.

---

## Setting Up Price Lists

This section discusses how to:

- Establish price lists.

- Define related business objects.

## Common Elements Used in This Section

### Status

Values are:

*Active:* Product prices on this list automatically supersede the product list price in transactions involving any related business objects.

*Inactive:* This list is ignored when calculating product prices.

### Product

Use to search for a product ID, enter a new product ID, and view the product IDs in a price list.

### Unit of Measure

Each list price is defined by the unit of measure. The unit of measure must be a valid unit of measure for that product as defined in the product master.

## Pages Used to Set Up Price Lists

Page Name	Object Name	Navigation	Usage
Price List	EOEP_PRICE_LIST	Pricing Configuration, Price List	Use to define a price list. You can set up price lists in multiple currencies and create start and end dates for each product's price.
Product Notes	EOEP_PRC_LIST_NOTE	Click the Recurring Note button on the Price List page.	Use to create and view product notes associated with a recurring price. These notes are used for information only and are separate from the standard product notes in the product definition component.
Related Objects	EOEP_PRCLST_ATTCH	Pricing Configuration, Price List, Related Objects.	Use to associate a price list with related business objects such as a customer, customer group or region and to associate price rules directly to a price list.
Search	EOEP_SEARCH_PAGE	Click the Find External Resource button on the Related Objects page.	Search for existing values for the field names on the Related Objects page.

## Establishing Price Lists

Access the Price List page.



Price List page

**Currency Code**

Use to establish the same price list with the same price list ID in multiple currencies. The price list is considered if the transaction is entered in the same currency as that of the price list.

---

**Note.** In PeopleSoft CRM, if a price is not available in a price list using the transaction currency, but a price list is available for the base currency, the system accesses the price from the price list in the base currency and converts it to the transaction currency. The currency is converted as long as there are conversion rates defined between the transaction and base currency. You must also define rate types for the customer and business unit for the currency conversion.

---

**Search****Search**

Click to select the price list detail based on your search criteria and view additional price list information. The price list detail appears in the Pricing Information tab. Click the Clear Search button to remove the search criteria.

**Description**

Search for products using elements of the product description or product ID.

**Add Product****Add**

Click after you enter the product ID. This adds the product to the price list.

**Pricing Information Tab**

Select the Pricing Information tab.

**Error**

If an error exists in the price list definition, a red square box appears in this column. This field is only visible if an error exists. For example, if you entered an invalid value, the line is marked as an error. Correct the error as necessary.

**UOM (unit of measure)**

Use to define a list price for a particular UOM for that product.

- Start Date and End Date

Use to define the effective period (start and end date) for the list price entry.
- List Price

Use to enter a list price for the products on the price list.
- Frequency

Use to select a recurring frequency in PeopleSoft Order Capture. If you select this option, the amount in the List Price field represents a recurring charge. If not, the list price represents a one time charge.

Valid options include: *Annually, Daily, Monthly, Quarterly, and Weekly.*

Additional Information Tab

Select the Additional Information tab.

- Recurring Note

Click this button to enter and view notes relating to recurring charges for the product. These notes are informational only and separate from the standard product notes defined in the product definition component.
- Protected

If you select the check box, the system does not apply adjustments to the price. The price protected flag on the transaction is activated.

**Note.** If a product with the same price is on two different price lists and one is price protected, the price protected one is used in the transaction.

Entering Related Objects

Access the Related Objects page.

Price List

Related Objects

Price List ID	Currency Code	SetID
RETAIL	USD	CRM01

Description

Retail

Status

Active

Related Business Objects

Find | View All

First

1 of 1

Last

Transaction:

Order Capture

+

-

Related Objects

Customize | Find

First

1 of 1

Last

Field Name	Identifier	Match these Values
Business Unit		

Related Price Rule

Customize | Find

First

1 of 1

Last

Rule	Description
DEM001	DEM001

Related Objects page

- Transaction

The option defaults and determines the list of available values to select in the Related Objects group box.
- Field Name

Select a value to tie a business object to the price list. Define the valid list for the pricing transaction when you set up PeopleSoft Enterprise Pricer. Values include:

*Business Unit, Customer Group, Region ID, Sold To Customer* for the *SO* (sales order) transaction.

*Business Unit, Customer Group, Region ID, Sold To Customer* for the *OC* (order capture) transaction.

**Identifier**

Enter values for the business object or click the Find External Resource button to search for values.

If the field name and identifier criteria match those on a particular transaction, this price list is considered for that transaction.

**Rule**

Select a price rule to tie the price list to the price rule.

A price rule can be directly associated with the price list. The price rule conditions defines the part of the transaction that must match in order for this price list to be considered at pricing time.



## CHAPTER 4

# Creating Price Rules

This section provides an overview of pricing rules and discusses how to set up price rules.

---

## Understanding Price Rules

The price rule defines the conditions of the transaction that must be met in order for the adjustments to be applied to the base price. The price rule is made up of one or more price conditions and one or more price formulas. The price condition defines the set of circumstances that make a price rule applicable to a transaction. The price formula defines the actions, which take place when the pricing conditions are met.

---

## Setting Up Price Rules

This section discusses how to:

- Establish price rule conditions.
- Establish price rule formulas.

### Pages Used to Set Up Price Rules

Page Name	Object Name	Navigation	Usage
Conditions	EOEP_CONDITION	Pricing Configuration, Price Rule, Conditions	Use to select the price-by fields, values for the price-by fields, and the operator which determines how the price-by fields are related to the transaction.
Formulas	EOEP_FORMULA	Pricing Configuration, Price Rule, Formulas	Use to define the actions which take place when the price rule conditions are met.
Search	EOEP_SEARCH_PAGE	Click the Search icon on the Conditions page.	Search for valid values for the selected price-by field in the price rule condition.

### Establishing Price Rule Conditions

Access the Conditions page.

Enter the conditions for the price rule in basic or advanced mode. Basic mode enables you to create price rules using the *And* operator. Advanced mode enables you to create more complex conditions. You can use the *Or* operator in addition to the *And* operator. Advanced mode enables you to enter the valid values directly for the price-by fields without having to go through the search or prompt page for the field.

To add a price rule condition in basic mode:

1. Select basic mode by clicking the Basic link on the Conditions page.
2. Select a transaction.

This transaction determines the valid price-by field names available for the conditions.

---

**Note.** In PeopleSoft Customer Relationship Management (PeopleSoft CRM) installations, the field is read only and defaults to “Order Capture”.

---

3. Change the default status from *Pending* to *Deployed*, *Inactive*, or *Ready to Test*.

*Pending:* Price rule is incomplete.

*Deployed:* Price rule is currently in use for pricing in the pricing system.

*Ready to Test:* Price rule is complete but is not in use for pricing in the pricing system. It can only be used in the simulator.

*Inactive:* Price rule is no longer active. Use to inactivate a rule that was previously in use.

4. Enter a description for the price rule.

This is a free-form text field.

5. Enter a short description.

A truncated version of the long description appears by default.

6. Select a field name in the Rule Conditions group box.

Choose the transaction field you wish to price by. For example, if you want this rule to apply to every order in a particular business unit, select *Business Unit* from the drop down.

7. Click the Search button to select values for the field names.

When you click the Search button, the system transfers you to a page from which you can search for and select valid values for the field name that you select. For example: If you selected “Business Unit” as a pricing key field, then you would get a list of Business Units to choose from. Values that have already been selected for the condition automatically appear as selected. You can restrict your search further by entering additional search data in the fields provided at the top of the page and clicking the Search button. Select one or more values that you wish to apply to the rule condition and click OK.

The condition appears in the Rule Definition section. The system displays the rule definition based on the last condition that you built. If you are updating an existing condition, you may need to click the Build Rule Definition button to have the system rebuild the entire price rule condition.

To add a price rule condition in advanced mode:

1. Select advanced mode by clicking the Advanced link on the Conditions page.
2. For a new price rule, select a transaction.

This transaction determines the valid price-by field names available for the conditions.

---

**Note.** In PeopleSoft CRM installations, the field is read only and defaults to “Order Capture”.

---

3. Change the status from *Pending* to *Deployed*, *Inactive*, or *Ready to Test*.

*Pending:* Price rule is incomplete.

*Deployed:* Price rule is currently in use for pricing in the pricing system.

*Ready to Test:* Price rule is complete, but is not in use for pricing in the pricing system. It can only be used in the simulator.

*Inactive:* Price rule is no longer active. Use to inactivate a rule that was previously in use.

4. Enter a description for the price rule.

This is a free-form text field.

5. Enter a short description.

A truncated version of the long description appears by default.

6. Select a field name in the Rule Conditions group box.

You may enter multiple field names by inserting a new row for each new field name.

7. Enter the field name values directly in the Identifier field or click the Search button.

Enter multiple values by separating the values with a comma. Alternatively, you can click the Search button. The system transfers you to a page from which you can search and select valid values for the field name that you selected for the condition. Values that were already selected for the condition automatically appear as selected. You can further restrict your search by entering additional search data in the fields provided on top of the page and clicking the Search button. Select the fields that you wish to apply to the rule condition and click OK.

The field name and value conditions defined in the Rule Conditions section appear in the Combined Conditions section. The individual rows in the Combined Conditions section serve as a foundation for you to create more complex conditions.

8. Select the rows in the Combined Conditions section that you want to use to create a more complex condition.
9. Select either the And or Or operator.
10. Click the Build Rule Definition button to create the advanced price rule.

The system automatically inserts your new condition in the Combined Conditions section. The condition also appears in the Rule Definition section.

You can create more complex conditions by selecting your new rows in the Combined Conditions section, selecting an operator, and clicking the Build Rule Definition button until you have created the desired rule definition.

Conditions		Formulas	
Transaction	Price Rule	Description	SetID
Order Capture	ENG000002	Surge Protection Off	ENRGY
Mode: Advanced		<a href="#">Change to Basic mode</a>	<a href="#">Save Price Rule As...</a>
▼ Rule Attributes			
*Status	Deployed		
Description	ENG000002		
*Short Description	Surge Protection Off		

Conditions page (1 of 2)

▼ Rule Conditions		<a href="#">Customize</a>   <a href="#">Find</a>		First	1-2 of 2	Last
Field Name	Identifier		Match these Values			
Product ID	EN100104		Surge Protection			
Offer ID	ENG0250003		\$25 OFF INITIAL COST - SURGE PROTEC			
▼ Combined Conditions						
		<a href="#">Customize</a>   <a href="#">Find</a>		First	1-4 of 4	Last
Select	Match these Values					
<input type="checkbox"/>	Product ID is equal to any in the list Surge Protection					
<input type="checkbox"/>	Offer ID is equal to any in the list \$25 OFF INITIAL COST - SURGE PROTECTION					
<input type="checkbox"/>	Product ID is equal to any in the list Surge Protection					
<input type="checkbox"/>	Offer ID is equal to any in the list \$25 OFF INITIAL COST - SURGE PROTECTION					
<input type="checkbox"/>	AND Product ID is equal to any in the list Surge Protection					
And/Or: <a href="#">Build Rule Definition</a>						
Rule Definition						
<b>The transaction contains the following:</b>						
Offer ID is equal to any in the list \$25 OFF INITIAL COST - SURGE PROTECTION						
AND						
Product ID is equal to any in the list Surge Protection						

Conditions page (2 of 2)

**Mode**

Use to determine the data entry method.

*Basic:* Enables you to search for values for the fields names that you have selected. The Match These Values column is populated with the description of the values that you selected after you made your selection. Rule conditions are automatically joined with the And conditional operator.

*Advanced:* Basic mode plus additional data entry features. Enables you to manually enter values for the identifiers or search for identifiers. If adding them manually, separate the values by a comma without a space between values. The Match These Values column is populated with the description of the identifiers that you enter.



The Combined Conditions grid is available and automatically populated with the basic field name and value rule conditions. The Combined Conditions grid enables you to create rule conditions that can be combined into more complex conditions. You can use logical And or Or operators.

Advanced mode is the default.

## Rule Attributes

### Transaction

Select a value from the available options to create a new price rule. Select a value in order to populate the list of values for the field names.

This field is only visible in add mode. Once the rule is created for a transaction, the transaction cannot be changed.

---

**Note.** In PeopleSoft CRM installations, this field is read only and defaults to “Order Capture”

---

### Status

Values are:

*Deployed:* Activates the price rule, so that it is used to determine price adjustments. You must enter data on the Formulas page before you can save the price rule in this status. You can also use the simulator to test price scenarios in this status.

*Inactive:* The price rule is no longer active. Use to inactivate a rule that was previously in use.

*Pending:* This status appears by default. You can save the price rule in this status without adding data on the Formulas page. Use this status when you want to save the price rule, but you don’t want the system to process any edits on the rule. You cannot use a rule in this status in the simulator.

*Ready to Test:* Use this status to test the rule with the simulator, but the rule is available to your pricing system.

### Description

Use to describe the rule.

### Short Description

Use for the short description of a rule. The first 20 characters of the description appear by default. The field is used as the label on pages and inquiries.

## Rule Conditions

### Error

If an error exists in the price rule definition, a red square box appears in this column. Correct the error. This field will only appear if an error exists.

### Field Name

Select the price-by field to use with the rule condition. The valid list of price-by fields is established on the Transaction Price By Keys page by your PeopleSoft Enterprise Pricer system administrator. The list of fields available when you create the price rule is determined by the transaction .

### Identifier

Use to manually enter values for the price-by fields. This value is available if you are using the *Advanced* mode only.

### Search Icon

Use to search for valid price-by field values.

---

**Note.** If you have previously selected values, those values remain selected until you clear them. You can restrict your search further by entering the appropriate ID and description values at the top of the search page.

---

## Combined Conditions

In the advanced mode, the field names and values that were entered for the rule conditions are included in the Combined Conditions grid when you click the Build Rule Definition button and select an operator. The items in the Combined Conditions grid are a foundation used to build more complex conditions. Select two or more rows to build the complex condition. Every new complex condition that you create is added to the Combined Conditions grid. You can continue to use the new conditions to create more complex conditions for the rule definition.

### And/Or

After selecting two or more combined conditions, select either operator to combine the conditions. This is available if you are using the *Advanced* mode.

---

**Note.** In basic mode, the system automatically uses only the And operator.

---

### Build Rule Definition

After selecting the conditions to use and the conditional operator, click this button to build the rule definition. The new condition is added to the Combined Conditions grid and the definition appears in the Rule Definition section.

## Rule Definition

Displays the final definition in both advanced and basic modes. When using the basic mode, the system displays the rule definition automatically. Click Save to save the price rule.

## Establishing Price Rule Formulas

Access the Formulas page.

See Chapter 2, “Implementing PeopleSoft Enterprise Pricer,” Configuring Application Code Options, page 9.

The screenshot displays the 'Formulas' page in the PeopleSoft Enterprise Pricer interface. At the top, there are tabs for 'Conditions' and 'Formulas', with 'Formulas' being the active tab. Below the tabs, a table shows transaction details: Transaction (Order Capture), Price Rule (ENG000002), Description (Surge Protection Off), and SetID (ENRGY). Below this table, it indicates 'Mode: Advanced' with a link to 'Change to Basic mode' and a 'Save Price Rule As...' button.

The 'Rule Attributes' section contains four dropdown menus: 'Price Action Type' (Discount/Surcharge), 'Price Type' (Quantity), 'Cascading/Summed' (Summed), and '\*Stop Processing Here' (Yes).

The 'Price Formulas' section is expanded, showing a 'Formula Definition' table. The table has columns for Unit of Measure, Start Date, End Date, Low Quantity, High Quantity, Percent or Amount Type, Adjustment Amount, Currency, and Charge Type. The first row of data shows: Unit of Measure (EA), Start Date (10/04/2002), End Date (12/31/2002), Low Quantity (1.0000), High Quantity (999.0000), Percent or Amount Type (Amount), Adjustment Amount (-25.0000), Currency (USD), and Charge Type (Discount). There are also search icons and navigation buttons (First, 1 of 1, Last) at the bottom right of the table.

Formulas page

The price action type selected determines what additional data are required on the price formula. The start and end dates and the high and low quantities are required for each formula. The date of the transaction and the quantities of the products on the transaction must fall within these ranges in order for system to apply the formula to the transaction.

## Rule Attributes

### Price Action Type

Use to define what the price rule does, if applied to a transaction. This is a required field.

Values vary for each transaction:

*Discount/Surcharge:* Apply a discount or surcharge to the line.

*Product Add:* Add a product to the order, such as a cancellation penalty product.

*Giveaway:* Apply a giveaway product which can be based on the line or order.

*Min/Max Target Discount:* Compare the discount adjustment and apply a target discount.

*Min/Max Target Price:* Compare the price adjustment and apply a target price.

*Min/Max Target Surcharge:* Compare the surcharge adjustment and apply a target surcharge.

---

**Note.** Use the target price action types to put limits on the total adjustments made to your transaction by the pricing engine. For example, if you define a maximum target discount for a product to be 25 percent, the system will apply discounts to the list price up to a 25 percent maximum. If you define a minimum surcharge for a product to be \$5, the system will always apply a minimum of a \$5 surcharge. If you define a minimum target price for a product to be 50.00 USD, the system applies adjustments to the base price, but does not discount the price below 50.00 USD.

---

*Price Override:* Apply a new price to replace the existing price.

---

**Note.** If the price rule is defined only for product ID, it is recommended that you use the Price List feature to define the base price for the product.

---

*Total Order Discount/Surcharge:* Apply a discount or surcharge to the entire order.

### Price Type

Use to define which transaction value the system should use to compare the range of the price rule formula.

Values vary for each transaction and include :

*Extended Price:*

*Quantity:*

*Volume:* Only applies to weight and volume pricing.

*Weight:* Only applies to weight and volume pricing.

---

**Note.** Weight and volume are not used by PeopleSoft CRM applications.

---

**Cascading/Summed**

This value determines how the system applies the adjustment for the *Discount/Surcharge* price action type.

*Cascading:* Applied as they are found. A second discount is applied to the previously discounted price, a third discount is applied to a price that has already been discounted twice, and so on. For example, if the system encounters two discounts: 10 percent and 20 percent to be taken off the list price of 100.00 USD, the system applies the discounts in the following manner: 10 percent off of 100.00 USD and 20 percent off of 90.00 USD. Thus, the unit price for the order schedule line would be 72.00 USD.

*Summed:* When the system finds multiple discounts, it adds them together and applies the discounts once. Thus, for the summed example, the system would apply discounts in this manner: the 10 percent and 20 percent discounts would be combined, for 30 percent off of 100.00 USD. The unit price for the order schedule line would be 70.00 USD.

**Promotion Code**

Displays promotions from PeopleSoft Promotions Management. If a price rule is generated by PeopleSoft Promotions Management, the promotion code is automatically assigned to the price rule.

---

**Note.** Not applicable to PeopleSoft CRM.

---

**Use Grace Days**

Select if you want the system to use the grace days assigned to the customer when determining which price formulas are applied to the price. A grace period (in days) can be defined for each customer.

---

**Note.** This option is not used by PeopleSoft CRM applications.

---

**Merchandising Type**

Displays values associated with promotions from PeopleSoft Promotions Management.

---

**Note.** Not applicable to PeopleSoft CRM.

---

**Period-to-Date**

Used to include period-to-date totals in the adjustment.

---

**Note.** This option is not used by PeopleSoft CRM applications.

---

**Stop Processing Here**

Prevents the system from applying further price adjustments when the system finds a match with a price rule. This occurs for total order or line adjustments. The system stops applying price adjustments after encountering the first price rule match that has this option selected.

---

**Note.** This option applies only for price adjustments. It does not apply for price lists associated with price rules.

---

**Price Formulas**

The fields in this grid vary depending on the price action type and price type.

**Unit of Measure**

Applies to price rules for product and product group only.

**Start Date and End Date**

The transaction date must fall within these dates if this rule is to apply.

---

**Note.** If using PeopleSoft Supply Chain Management (PeopleSoft SCM) installations, a field on the General Information - Payment Options page indicates the grace pricing discount days. An entry in this field enables customers to receive discount pricing beyond the end date for the price break.

---

<b>Low Quantity</b>	Specify the lower limit of the range of quantities that this rule should apply to. The field is based on the price type definition. The system enters the next lower quantity or amount limit as you insert price formula entries on this page. The quantity appears if you selected the <i>Quantity</i> price type and the amount appears if you entered the <i>Extended Price</i> price type.
<b>High Quantity</b>	Specify the upper limit of the range of quantities that this rule should apply to. An upper limit of 9999999999 enables the price formula to be applied regardless of the quantity entered on the transaction. For example, if you entered a price formula with a quantity range of 1–200 and didn't create any other price formulas, the system would not apply a price formula to an order with a quantity of 201 unless an upper limit was entered. The system uses 9999999999 as the default in the High Quantity field for the last price formula if the field is left blank.
<b>Percent or Amount Type</b>	Make adjustments by percentage or a fixed amount. Values are: <i>Amount</i> or <i>Percent</i> .
<b>Adjustment Amount</b>	Enter the adjustment amount if you selected <i>Amount</i> in the Percent or Amount Type field.
<b>Adjustment Percent</b>	Enter the adjustment percentage if you selected <i>Percent</i> in the Percent or Amount Type field.
<b>Price</b>	Enter the new price, if the price action type is <i>Price Override</i> .
<b>Currency</b>	Use to specify the currency shown in the Amount Type field and for price overrides.
<b>Charge Type</b>	<p>Select from the available options for price action types: <i>Discount / Surcharge</i> and <i>Total Discount / Surcharge</i>.</p> <p><i>Discount:</i> Reduces the list price of the product or the entire order in the case of a total order discount.</p> <p><i>Surcharge:</i> Increases the price of the product or the entire order in the case of a total order surcharge.</p>
<b>Minimum Amount and Maximum Amount</b>	<hr/> <p><b>Important!</b> Discounts must always be negative numbers and surcharges must always be positive numbers. If you select <i>Discount</i> but enter a positive number, the system changes the number to a negative number.</p> <hr/> <p>Enter both of these values if you selected <i>Amount</i> in the Percent or Amount Type field. This applies to the following price action types: <i>Min/Max Target Discount</i> and <i>Min/Max Target Surcharge</i>.</p>
<b>Minimum Percent and Maximum Percent</b>	Enter both of these values if you selected <i>Percent</i> in the Percent or Amount Type field. This applies to the following price action types: <i>Min/Max Target Discount</i> and <i>Min/Max Target Surcharge</i> .

**Minimum Price and Maximum Price**

Enter both of these values if you selected *Min/Max Target Price*. in the Price Action Type field.

**Formula Detail Tab**

Select the Formula Detail tab.

The Formula Detail tab is used if the Price Action Type is Giveaway or Product Add.

**UOM Promo** (unit of measure promotion)

Select the UOM for the product that is to be given away or added to the order.

**Giveaway Type**

Applies only to giveaways. Specify whether you want the giveaway to be applied to each line of the transaction (sales order) or to be applied only once to the header of the transaction.

*Per Line:* The system applies this giveaway to every line.

*Per Order:* The system applies this giveaway only once to the entire sales order.

**Terms and Adjustment Type Tab**

Select the Terms and Adjustments Type tab.

**Terms**

Assign a payment term to the formula. If this formula is used when pricing the transaction, the system assigns the most favorable payment terms to the transaction.

---

**Important!** If you set up a price rule with payment terms as a key and you have a price formula with payment terms, you may not get the intended price adjustment, if you reprice the order.

---



---

**Note.** This option is not used in PeopleSoft CRM.

---

**Adjustment Type**

Values are:

*Bill Back:* An adjustment that is accrued, instead of reducing the net unit price of the item on the invoice.

---

**Note.** This option does not appear in PeopleSoft CRM. PeopleSoft CRM uses off-invoice adjustments.

---

*Off-Invoice:* An adjustment that reduces the net unit price or the price of the order in the case of a total order adjustment.

**Account Distribution Codes**

Select general ledger distribution accounts to be used for the price rule formulas if they are applied to the transaction.

---

**Note.** This option is not used by PeopleSoft CRM.

---

**Discount Dist Code and Surcharge Dist Code**(discount distribution code and surcharge distribution code)

These distribution codes, along with the associated amounts, are passed to PeopleSoft Billing Interface tables during the Populate Billing process.

To use bill backs, enter both a discount and surcharge code. Off-invoice discounts or surcharges only require one of these codes.

**Discount Dist Percentage and Surcharge Dist Percentage**(discount distribution percentage and surcharge distribution)

The sum of the percentages must equal 100 percent.





## CHAPTER 5

# Using the Arbitration Plan

This section provides an overview of the arbitration plan and discusses how to set up the arbitration plan.

---

### Understanding Arbitration Plans

The arbitration plan is the arbiter when multiple price rules match the transaction. It decides the order in which the price rules are applied to the transaction base price. For price rules that match on the same criteria, you can define the arbitration plan to break those ties and tell the system which rule to apply first. The arbitration plan can also be used to filter the price rules that can be applied to the transaction. The definition of the arbitration plan nodes and the placement of the decision nodes determine the filtering power of the arbitration plan. To verify your arbitration plan is performing as you expect, it is recommended you use the pricing simulator to test your arbitration plan and price rules. Placement of certain price action types in the arbitration tree will not affect the order in which the adjustment is applied to the transaction, but it may affect the 'Stop Processing Here' flag defined on the price rule. These price action types are:

- Summed - Adjustments are always summed and applied after all other adjustments have been made.
- Total Order Discounts/Surcharges - Adjustments are always summed and applied to the total order value after all other line level adjustments have been made
- Giveaways - Are always applied after all other adjustments have been made.

An example of a very basic arbitration plan tells the system how to sort all price rules with conditions that match the transaction.

Arbitration Plan	Transaction	Description	SetID
DEFAULT	OC	Order Capture	IPROD

\*Description:  ☒ Default

---

**Arbitration Tree**

- [-] Highest Discount First

**Selection Detail**

Arbitration Type:

Decision:

Arbitration Plan using a Highest Discount First decision

If you are certain your price rules are defined only for discounts (no price overrides or giveaways), you can define your arbitration plan as simply as this. If you use any of the other price action types, the pricing results using this plan will be inconsistent. A decision point, i.e. highest discount first, defined at the highest level in the arbitration tree instructs the pricing engine to apply all matching price rules. You should refine your plan based on your use of the pricing features.

The following example instructs the system to select all price rules with conditions matching the transaction and to sort them first by surcharges and then by discounts. If there are multiple surcharges, apply the lowest surcharge first. After all the surcharges have been applied, apply the discounts (highest discount first).

Arbitration Plan	Transaction	Description	SetID
NEXT	OC	Order Capture	CRM02

\*Description:  ☐ Default

---

**Arbitration Tree**

- [-] Surcharge
  - [-] Lowest Surcharge First
- [-] Discount
  - [-] Highest Discount First

**Selection Detail**

Arbitration Type:

Decision:

Arbitration Plan using surcharges and discount

The arbitration plan can also be used as a filter to apply certain price rules to a transaction and not others. Although some price rules may match the transaction according to the conditions of the price rule, the arbitration plan can be defined in such a way that it bypasses some price rules. The example above is also a filter in that it only applies surcharges and discounts to the transaction. If there are giveaway or price override price rules defined that match the transaction, they are not applied when using this arbitration plan.

Continuing with the same example; to apply giveaway and price override price rules, you can define the arbitration plan as follows:

**Arbitration Plan**

Arbitration Plan	Transaction	Description	SetID
NEXT	OC	Order Capture	CRM02

\*Description:  ☐ Default

**Arbitration Tree**

- Price Override
  - Lowest Price Override First
- Surcharge
  - Lowest Surcharge First
- Discount
  - Highest Discount First
- Giveaway

**Selection Detail**

Arbitration Type:

Price Action Type:

Arbitration Plan using Giveaways and Price Overrides

Any arbitration plan that does not have a decision point at the top level of the tree is a filter. Wherever you place the decision node in the tree is where you tell the pricing engine you don't care to further differentiate the price rules - just apply whatever rules match the transaction at that point in the order of the decision.

For example, you want to define an arbitration plan that selects only discount price rules that match certain fields on your transaction. In this case, you define the order in which those matching price rules are applied to the transaction. In this example, let's say you want to match price rules defined only by sold-to customer, product, and region code. Once the system finds the matching price rules, first apply those rules that match all three criteria, then apply the rules that match only the product, then any discounts defined for our favorite customers.

Arbitration Plan	Transaction	Description	SetID
NEXT	OC	Order Capture	CRM02

**\*Description:**  ☐ **Default**

### Arbitration Tree

- Sold-to, Product, Region**
  - Ship To Customer
  - Product ID
  - Region ID

#### Selection Detail

**Arbitration Type:**

**Description:**

**Pricing Keys**

<input type="text" value="Ship To Customer"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Product ID"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Region ID"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

### Arbitration Plan using a filter

This arbitration plan considers only discount price rules that are defined by sold-to customer, product, and region; product; or sold-to customer only. It applies the formulas for those price rules in that order. If there is a tie within a node, i.e. there are two price rules defined for the product ID, the system sorts those two rules and applies the highest discount first.

In the event where two rules match the same node in the tree, the system finds the next node that can be used for each rule until a different node is used by each rule or a decision point is reached. When searching for the node, if the rule does not match a top-level node, it skips any child node and evaluates the next node, which is at the same level or a level higher as the node that is evaluated last. If the rule does not match any node in the tree and there is no final decision point defined at the top level of the tree, the rule is ignored. Every node that is used to break a tie ends in a decision

You can create price rules without an arbitration plan, but the system does not apply the price rules unless you create an arbitration plan.

**Note.** The options that are available in the arbitration plan are established by each transaction.

## Setting Up an Arbitration Plan

This section discusses how to set up an arbitration plan.

## Pages Used to Set Up Arbitration Plans

Page Name	Object Name	Navigation	Usage
Arbitration Plan	EOEP_ARB_PLAN	Pricing Configuration, Arbitration Plan	Define how price rules apply to the base or list price when pricing a transaction.

## Setting Up an Arbitration Plan

Access the Arbitration Plan page.

Arbitration Plan	Transaction	Description	SetID
DEFAULT	OC	Order Capture	SHARE

**\*Description:**  Default ☒ **Default**

---

### Arbitration Tree

- Default Pricing Arbitration
  - Product Add
    - Rule Name in Descending Order
  - Free Period Promotion
    - Rule Name in Descending Order
  - Price Override
    - Highest Price Override First
  - Cascading
    - Discount
      - Quantity
      - Extended Price
      - Highest Discount First
    - Surcharge
      - Quantity
      - Extended Price
      - Lowest Surcharge First
  - Summed
    - Discount
    - Surcharge

#### Selection Detail

**Arbitration Type:**  Action Type ▼

**Price Action Type:**  Giveaway ▼

Arbitration Plan page

## Transaction

Arbitration plans are defined by pricing transaction. The system uses this field to verify and limit the price by keys. In add mode, values are:

*Buying Agreement:* Used with PeopleSoft Order Management.

*Sales Order Batch:* Used with PeopleSoft Order Management.

*Order Capture:*Used with PeopleSoft Order Capture.

**Note.** In PeopleSoft Customer Relationship Management (PeopleSoft CRM), the OC (order capture) transaction appears by default, and you are not able to select another value.

*Sales Order:* Used with PeopleSoft Order Management.

---

**Note.** In PeopleSoft Order Management, the system assigns the arbitration plan ID to the sold to customer and customer group. The arbitration plan ID appears by default on the sales order in the following order: sold to customer, customer group, and default defined for the transaction.

---

### Price Date

Select the transaction date that you want the system to match against the start and end dates defined on the Price Formulas page. This is the date used for the start date of individual products on the price list.

This field is available if price dates are selected during implementation on the Price Transaction Code page.

---

**Note.** PeopleSoft CRM always uses the order date as the default transaction date. The Price Date field is not available for the OC transaction.

Values are:

*Order Date:* The date the order header is created. The system uses the current date as the default date on a sales order header, but you can enter another date.

*Requested Arrival Date:* The date your customers want the order to arrive at their site. This value is used by PeopleSoft Supply Chain Management (PeopleSoft SCM) installations only.

*Schedule Ship Date:* The date the order line is scheduled to ship. The system calculates this date from the Requested Arrival Date, using the transit lead time and exception ship dates, but you can enter another date. This value is used only by PeopleSoft SCM installations.

---

### Default

Select to establish the default arbitration plan. The system uses the default arbitration plan when a customer doesn't have another associated arbitration plan or doesn't belong to a customer group that has an associated arbitration plan. You must have one default arbitration plan for each transaction.

## Arbitration Tree

Use the buttons on the toolbar to edit and navigate the arbitration tree.

---

**Note.** You can copy, cut, and paste between different arbitration plans or from an existing arbitration plan to a new one using the buttons on the toolbar.

---

<b>Add Sibling</b>	Click this button to add a new node to the same level as the selected node.
<b>Add Child</b>	Click this button to add a new node underneath the selected node.
<b>Copy</b>	Click this button to copy the selected node to the clipboard, so that it can be pasted somewhere else.
<b>Copy Branch</b>	Click this button to copy the selected node and any nodes underneath it.
<b>Cut</b>	Click this button to remove the selected branch from the tree. The nodes are copied to the clipboard, so that they can be pasted somewhere else.
<b>Delete</b>	Click this button to remove the branch from the tree. The nodes are not copied to the clipboard.

**Paste as Sibling**

Click this button to paste the nodes from the clipboard. The nodes are inserted at the same level as the selected node.

**Paste as Child**

Click this button to paste the nodes from the clipboard. The nodes are inserted as a child of the selected node

**Move Up**

Click this button to move the selected node up one level.

**Move Down**

Click this button to move the selected node down one level.

**Selection Detail****Arbitration Type**

Select from the following options to add nodes to the arbitration tree to instruct the system how to apply the price rules. Values are:

*Action Type:* Select corresponding values from the Price Action Type field:

- *Discount*
- *Giveaway*
- *Price Override*
- *Surcharge*
- *Total Order Discount*
- *Total Order Surcharge.*
- *Free Period Promotion*
- *Product Add*

This list of values determined during implementation on the Price Transaction Code page.

*Cascading/Summed:* Select either value from the Cascaded/Summed field.

- *Rule Name is Ascending Order.*
- *Highest Discount First.*
- *Highest Surcharge First.*
- *Rule Name in Descending Order.*
- *Lowest Discount First.*
- *Lowest Surcharge First.*
- *Highest Price Override First.*
- *Lowest Price Override First.*

*Price Rule:* Enter a description and select a price rule. This value replaces the Exclusive Pricing feature in previous releases.

*Price Type:* Select corresponding values from the Price Action Typefield. Values include:

- *Extended Price*
- *Quantity*
- *Volume*

- *Weight*

---

**Note.** PeopleSoft CRM uses extended price and quantity only.

---

*Pricing Keys:* Enter a description and select a pricing key. The list of values is based on the pricing keys established for the transaction type. You can define a node similar to the price rule sequence used in previous releases.

*Folder:* Select a folder in the node and enter a description to rename a folder in the node. You can group nodes of a tree and give them a name. It is used for information purposes only.

### Update Tree

Click this button to apply your selections to the arbitration tree.



## CHAPTER 6

# Working With the Pricing Simulator

This section provides an overview of the pricing simulator and discusses how to run the pricing simulator to test pricing scenarios.

---

## Understanding the Pricing Simulator

The pricing simulator enables you to test the pricing information that you set up. Use it to view the outcome of pricing under different scenarios or use it to test specific pricing criteria with a particular customer. You can adjust the price rules, price lists, and arbitration plan until you receive the desired pricing adjustments.

---

## Running the Pricing Simulator

This section discusses how to:

- Run the pricing simulator.
- Update line-level pricing keys in the simulation.

## Pages Used to Run the Pricing Simulator

Page Name	Object Name	Navigation	Usage
Simulator	EOEPW_TEST	Order Pricing CRM, Simulator	Use to test the pricing information set up with PeopleSoft Enterprise Pricer and to select values for the transaction price-by keys used in the pricing simulation.
Pricing Keys	EOEP_TEST_LN_KEY	Click the Pricing Keys button on the Simulator page.	Use to select and view the line level pricing keys used in the pricing simulation.
Header Adjustments	EOEP_TEST_HD_ADJST	Click the Adjustments button on the Simulator page.	View the details of the adjustments that apply to the header. The fields on this page are the same as those that you set up on the Price Rule and Price Arbitration page.
Line Adjustments	EOEP_TEST_LN_ADJST	Click the Adjustments button on the Simulator page.	View the details of the adjustments that apply to the line. The fields on this page are the same as those that you set up on the Price Rule and Price Arbitration page.

## Running the Pricing Simulator

Access the Simulator page.

**Simulator**

Transaction	Description	Price Test ID
OC	Order Capture	HTECH 1

**Description:**

**Header Information**

<b>Currency Code:</b>	<input type="text" value="USD"/>	<b>Pricing Keys</b>	Find   View All	First	1-3 of 3	Last
<b>Base Currency:</b>	<input type="text" value="USD"/>	<b>Key field code</b>	<b>Value</b>			
<b>Order Date:</b>	<input type="text" value="10/07/2002"/>	<input type="text" value="Sold To Customer"/>	<input type="text" value="CIHT0001"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	
<b>Arbitration Plan:</b>	<input type="text" value="DEFAULT"/>	<input type="text" value="Offer ID"/>	<input type="text" value="HCO00101"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	
		<input type="text" value="Business Unit"/>	<input type="text" value="HT001"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	

**Line Information** Customize | Find | View All First 1-3 of 3 Last

Line Info	Details													
Product ID	UOM	Qty	List Price	Net Unit Price	Recurring Price	Frequency	Free Periods	Protected						
1 HTB3300	EA	7.0000	4000.0000	3760.0000	0.0000			<input type="checkbox"/>	<input type="button" value="Key"/>	<input type="button" value="Print"/>	<input type="button" value="+"/>	<input type="button" value="-"/>		
2 HTS9800	EA	1.0000	468.0000	439.9200	0.0000			<input type="checkbox"/>	<input type="button" value="Key"/>	<input type="button" value="Print"/>	<input type="button" value="+"/>	<input type="button" value="-"/>		
3 HT8200	EA	1.0000	8150.0000	7661.0000	0.0000			<input type="checkbox"/>	<input type="button" value="Key"/>	<input type="button" value="Print"/>	<input type="button" value="+"/>	<input type="button" value="-"/>		

<b>Transaction Total</b>	<b>Statistics</b>
<b>Total Net Price:</b> 34420.92	<b>Number of Rules Used:</b> 1 of 70
<b>Adjustment Amount:</b> 0.00	<b>Number of Adjustments Applied:</b> 0
<b>Transaction Total:</b> 34420.92	<b>Number of Giveaways Found:</b> 0
	<b>Number of Product Adds Found:</b> 0

Simulator page

**Note.** You can update the pricing keys in the simulator in two places. Update the header level pricing keys on the main page of the simulator. The line level pricing keys can be updated on the Pricing Keys page.

**Description** Enter descriptive text for the simulation. You can save a simulation for later use.

## Header Information

Select information to simulate the transaction header and lines.

**Currency Code** Enter the currency code of the simulated transaction.

**Base Currency** Enter the base currency of the business unit for the simulated transaction.

**Order Date** Used to determine applicable price formulas. The current date appears by default.

**Arbitration Plan** The list of available options is based on the transaction that you selected. If you don't select an arbitration plan, the default is used.

## Pricing Keys

The data in this section represent the transaction header and line information.

**Key field code** Represents the transaction field used to match to the price rules. The available values are based on the pricing keys established for the transaction.

**Value** Represents the transaction value of the key field code. The available values are based on your selection in the Key field code field.

## Line Information

Select the Line Info tab.

Select product, unit of measure, and quantity to simulate the transaction line detail.

**List Price** Displays the list or base price for the product.

**Net Unit Price** Displays the price after the adjustments have been applied.

**Recurring Price and Frequency** Retrieves from the list price applied to the line. These fields appear only if you are using PeopleSoft Order Capture.

**Free Periods** Indicates any applicable free period promotion.

**Protected** Select if the product is price protected on the applied price list.

**Pricing Keys** Click this button to edit or view the pricing keys for additional line level transaction information (in addition to the pricing keys on the Simulator page). The available values are based on the pricing keys established for the transaction.

**Adjustments** Click this button to view the line level price adjustments for the simulation. The button is visible only if there are header or line adjustments that match the criteria of the price simulation.

**Details Tab** Use to view price list and payment terms information.

**Price List Origin** Displays the origin of the list price.

*Price List:* The price is retrieved from a price list. The price list ID appears next to Price List Origin field.

*Price List (base):* The price is retrieved in the base currency from a price list . The price list ID appears next to Price List Origin field.

---

**Note.** This value is used in PeopleSoft Customer Relationship Management (PeopleSoft CRM) only.

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*Product Price:* The price is retrieved from the Product Price definition.

*Product Price (base):* The list price is retrieved in the base currency from the Product Price definition.

**Price List ID** Displays the ID for the price list from which the list price was retrieved.

**Payment Terms** Displays the terms retrieved from the price rule that match the simulation.

---

**Note.** This option is used in PeopleSoft Supply Chain Management (PeopleSoft SCM) installations only.

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## Order Level Adjustments

Displays the adjustments that apply to the entire order.

**Statistics**

Displays statistical results of the simulation.

**Calculate****Calculate**

Click to calculate or recalculate the price simulation and view the price adjustments.

**Updating Line Level Pricing Keys in the Simulation**

Access the Pricing Keys page .

**Line Information**

Represents the transaction line level information.

**Pricing Keys****Key field code**

Displays values based on the pricing keys established for the transaction. You can select different value to create different pricing simulations.

**Value**

Displays values based on your selection in the Key field code field. After updating the field, click the Calculate button on the Simulator page to view the results.



## APPENDIX A

# ISO Country and Currency Codes

PeopleBooks use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

This appendix discusses:

- ISO country codes.
- ISO currency codes.

### See Also

“About This PeopleBook,” Typographical Conventions and Visual Cues

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## ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

ISO Country Code	Country Name
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla
ALB	Albania
AND	Andorra
ANT	Netherlands Antilles
ARE	United Arab Emirates
ARG	Argentina
ARM	Armenia
ASM	American Samoa
ATA	Antarctica

ISO Country Code	Country Name
ATF	French Southern Territories
ATG	Antigua and Barbuda
AUS	Australia
AUT	Austria
AZE	Azerbaijan
BDI	Burundi
BEL	Belgium
BEN	Benin
BFA	Burkina Faso
BGD	Bangladesh
BGR	Bulgaria
BHR	Bahrain
BHS	Bahamas
BIH	Bosnia and Herzegovina
BLR	Belarus
BLZ	Belize
BMU	Bermuda
BOL	Bolivia
BRA	Brazil
BRB	Barbados
BRN	Brunei Darussalam
BTN	Bhutan
BVT	Bouvet Island
BWA	Botswana
CAF	Central African Republic
CAN	Canada
CCK	Cocos (Keeling) Islands



ISO Country Code	Country Name
CHE	Switzerland
CHL	Chile
CHN	China
CIV	Cote D'Ivoire
CMR	Cameroon
COD	Congo, The Democratic Republic
COG	Congo
COK	Cook Islands
COL	Colombia
COM	Comoros
CPV	Cape Verde
CRI	Costa Rica
CUB	Cuba
CXR	Christmas Island
CYM	Cayman Islands
CYP	Cyprus
CZE	Czech Republic
DEU	Germany
DJI	Djibouti
DMA	Dominica
DNK	Denmark
DOM	Dominican Republic
DZA	Algeria
ECU	Ecuador
EGY	Egypt
ERI	Eritrea
ESH	Western Sahara

ISO Country Code	Country Name
ESP	Spain
EST	Estonia
ETH	Ethiopia
FIN	Finland
FJI	Fiji
FLK	Falkland Islands (Malvinas)
FRA	France
FRO	Faroe Islands
FSM	Micronesia, Federated States
GAB	Gabon
GBR	United Kingdom
GEO	Georgia
GHA	Ghana
GIB	Gibraltar
GIN	Guinea
GLP	Guadeloupe
GMB	Gambia
GNB	Guinea-Bissau
GNQ	Equatorial Guinea
GRC	Greece
GRD	Grenada
GRL	Greenland
GTM	Guatemala
GUF	French Guiana
GUM	Guam
GUY	Guyana
GXA	GXA - GP Core Country

ISO Country Code	Country Name
GXB	GXB - GP Core Country
GXC	GXC - GP Core Country
GXD	GXD - GP Core Country
HKG	Hong Kong
HMD	Heard and McDonald Islands
HND	Honduras
HRV	Croatia
HTI	Haiti
HUN	Hungary
IDN	Indonesia
IND	India
IOT	British Indian Ocean Territory
IRL	Ireland
IRN	Iran (Islamic Republic Of)
IRQ	Iraq
ISL	Iceland
ISR	Israel
ITA	Italy
JAM	Jamaica
JOR	Jordan
JPN	Japan
KAZ	Kazakstan
KEN	Kenya
KGZ	Kyrgyzstan
KHM	Cambodia
KIR	Kiribati
KNA	Saint Kitts and Nevis

ISO Country Code	Country Name
KOR	Korea, Republic of
KWT	Kuwait
LAO	Lao People's Democratic Rep
LBN	Lebanon
LBR	Liberia
LBY	Libyan Arab Jamahiriya
LCA	Saint Lucia
LIE	Liechtenstein
LKA	Sri Lanka
LSO	Lesotho
LTU	Lithuania
LUX	Luxembourg
LVA	Latvia
MAC	Macao
MAR	Morocco
MCO	Monaco
MDA	Moldova, Republic of
MDG	Madagascar
MDV	Maldives
MEX	Mexico
MHL	Marshall Islands
MKD	Fmr Yugoslav Rep of Macedonia
MLI	Mali
MLT	Malta
MMR	Myanmar
MNG	Mongolia
MNP	Northern Mariana Islands

ISO Country Code	Country Name
MOZ	Mozambique
MRT	Mauritania
MSR	Montserrat
MTQ	Martinique
MUS	Mauritius
MWI	Malawi
MYS	Malaysia
MYT	Mayotte
NAM	Namibia
NCL	New Caledonia
NER	Niger
NFK	Norfolk Island
NGA	Nigeria
NIC	Nicaragua
NIU	Niue
NLD	Netherlands
NOR	Norway
NPL	Nepal
NRU	Nauru
NZL	New Zealand
OMN	Oman
PAK	Pakistan
PAN	Panama
PCN	Pitcairn
PER	Peru
PHL	Philippines
PLW	Palau

ISO Country Code	Country Name
PNG	Papua New Guinea
POL	Poland
PRI	Puerto Rico
PRK	Korea, Democratic People's Rep
PRT	Portugal
PRY	Paraguay
PSE	Palestinian Territory, Occupie
PYF	French Polynesia
QAT	Qatar
REU	Reunion
ROU	Romania
RUS	Russian Federation
RWA	Rwanda
SAU	Saudi Arabia
SDN	Sudan
SEN	Senegal
SGP	Singapore
SGS	Sth Georgia & Sth Sandwich Is
SHN	Saint Helena
SJM	Svalbard and Jan Mayen
SLB	Solomon Islands
SLE	Sierra Leone
SLV	El Salvador
SMR	San Marino
SOM	Somalia
SPM	Saint Pierre and Miquelon
STP	Sao Tome and Principe

ISO Country Code	Country Name
SUR	Suriname
SVK	Slovakia
SVN	Slovenia
SWE	Sweden
SWZ	Swaziland
SYC	Seychelles
SYR	Syrian Arab Republic
TCA	Turks and Caicos Islands
TCD	Chad
TGO	Togo
THA	Thailand
TJK	Tajikistan
TKL	Tokelau
TKM	Turkmenistan
TLS	East Timor
TON	Tonga
TTO	Trinidad and Tobago
TUN	Tunisia
TUR	Turkey
TUV	Tuvalu
TWN	Taiwan, Province of China
TZA	Tanzania, United Republic of
UGA	Uganda
UKR	Ukraine
UMI	US Minor Outlying Islands
URY	Uruguay
USA	United States

ISO Country Code	Country Name
UZB	Uzbekistan
VAT	Holy See (Vatican City State)
VCT	St Vincent and the Grenadines
VEN	Venezuela
VGB	Virgin Islands (British)
VIR	Virgin Islands (U.S.)
VNM	Viet Nam
VUT	Vanuatu
WLF	Wallis and Futuna Islands
WSM	Samoa
YEM	Yemen
YUG	Yugoslavia
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

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## ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

ISO Currency Code	Description
ADP	Andorran Peseta
AED	United Arab Emirates Dirham
AFA	Afghani
AFN	Afghani
ALK	Old Lek
ALL	Lek
AMD	Armenian Dram



ISO Currency Code	Description
ANG	Netherlands Antilles Guilder
AOA	Kwanza
AOK	Kwanza
AON	New Kwanza
AOR	Kwanza Reajustado
ARA	Austral
ARP	Peso Argentino
ARS	Argentine Peso
ARY	Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijani Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

ISO Currency Code	Description
BND	Brunei Dollar
BOB	Boliviano
BOP	Peso
BOV	Mvdol
BRB	Cruzeiro
BRC	Cruzado
BRE	Cruzeiro
BRL	Brazilian Real
BRN	New Cruzado
BRR	Brazilian Real Dollar
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	N/A
BWP	Pula
BYB	Belarussian Ruble
BYR	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CDF	Franc Congolais
CHF	Swiss Franc
CLF	Unidades de fomento
CLP	Chilean Peso
CNX	Peoples Bank Dollar
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSD	Serbia Dinar

ISO Currency Code	Description
CSJ	Krona A/53
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor
EEK	Kroon
EGP	Egyptian Pound
EQE	Ekwele
ERN	Nakfa
ESA	Spanish Peseta
ESB	Convertible Peseta
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falklands Isl. Pound
FRF	French Franc
GBP	Pound Sterling

ISO Currency Code	Description
GEK	Georgian Coupon
GEL	Lari
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNE	Syli
GNF	Guinea Franc
GNS	Syli
GQE	Ekwele
GRD	Drachma
GTQ	Quetzal
GWE	Guinea Escudo
GWP	Guinea-Bissau Peso
GYD	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Dinar
HRK	Kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILP	Pound
ILR	Old Shekel
ILS	New Israeli Sheqel
INR	Indian Rupee
IQD	Iraqi Dinar

ISO Currency Code	Description
IRR	Iranian Rial
ISJ	Old Krona
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands dollar
KZT	Tenge
LAJ	Kip Pot Pol
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti
LSM	Maloti
LTN	Lithuanian Litas
LTT	Talonas
LUC	Convertib Franc
LUF	Luxembourg Franc

ISO Currency Code	Description
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MAF	Mali Franc
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MLF	Mali Franc
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MTP	Maltese Pound
MUR	Mauritius Rupee
MVQ	Maldiva Rupee
MVR	Rufiyaa
MWK	Malawian Kwacha
MXN	Mexican Peso
MXP	Mexican Peso
MXV	Mexican UDI
MYR	Malaysian Ringgit
MZE	Mozambique Escudo
MZM	Metical
NAD	Namibia Dollar

ISO Currency Code	Description
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PES	Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROK	Leu A/52
ROL	Leu
RUB	Russian Ruble
RUR	Russian Federation Rouble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands

ISO Currency Code	Description
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	St Helena Pound
SIT	Tolar
SKK	Slovak Koruna
SLL	Leone
SOS	Somali Shilling
SRG	Surinam Guilder
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TJS	Somoni
TMM	Manat
TND	Tunisian Dinar
TOP	Pa'anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling



ISO Currency Code	Description
UAH	Hryvnia
UAK	Karbovanet
UGS	Uganda Shilling
UGW	Old Shilling
UGX	Uganda Shilling
USD	US Dollar
USN	US Dollar (Next day)
USS	US Dollar (Same day)
UYN	Old Uruguay Peso
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum
VEB	Bolivar
VNC	Old Dong
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	GOLD
XBA	European Composite Unit
XBB	European Monetary Unit
XBC	European Unit of Account 9
XBD	European Unit of Account 17
XCD	East Caribbean Dollar
XDR	SDR
XEU	EU Currency (E.C.U)

ISO Currency Code	Description
XFO	Gold-Franc
XFU	UIC-Franc
XOF	CFA Franc BCEAO
XPD	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	For Testing Purposes
XXX	Non Currency Transaction
YDD	Yemeni Din
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUM	New Dinar
YUN	Yugoslavian Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Zambian Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWC	Rhodesian Dollar
ZWD	Zimbabwe Dollar

# Glossary of PeopleSoft Terms

<b>absence entitlement</b>	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
<b>absence take</b>	This element defines the conditions that must be met before a payee is entitled to take paid time off.
<b>accounting class</b>	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
<b>accounting date</b>	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
<b>accounting split</b>	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
<b>accumulator</b>	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
<b>action reason</b>	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
<b>action template</b>	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
<b>activity</b>	<p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p>

<b>agreement</b>	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
<b>allocation rule</b>	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
<b>alternate account</b>	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
<b>AR specialist</b>	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
<b>arbitration plan</b>	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
<b>assessment rule</b>	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
<b>asset class</b>	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
<b>attribute/value pair</b>	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
<b>authentication server</b>	A server that is set up to verify users of the system.
<b>base time period</b>	In PeopleSoft Business Planning, the lowest level time period in a calendar.
<b>benchmark job</b>	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
<b>book</b>	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
<b>branch</b>	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
<b>budgetary account only</b>	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
<b>budget check</b>	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
<b>budget control</b>	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
<b>budget period</b>	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
<b>business event</b>	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
<b>business unit</b>	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
<b>buyer</b>	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
<b>catalog item</b>	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
<b>catalog map</b>	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
<b>catalog partner</b>	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
<b>categorization</b>	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
<b>channel</b>	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
<b>ChartField</b>	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
<b>ChartField balancing</b>	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
<b>ChartField combination edit</b>	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
<b>ChartKey</b>	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
<b>checkbook</b>	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
<b>Class ChartField</b>	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
<b>clone</b>	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
<b>collection</b>	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

<b>collection rule</b>	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
<b>compensation object</b>	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
<b>compensation structure</b>	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
<b>condition</b>	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
<b>configuration parameter catalog</b>	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
<b>configuration plan</b>	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
<b>content reference</b>	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
<b>context</b>	<p>In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.</p> <p>In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.</p>
<b>control table</b>	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
<b>cost profile</b>	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
<b>cost row</b>	A cost transaction and amount for a set of ChartFields.
<b>current learning</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
<b>data acquisition</b>	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
<b>data elements</b>	<p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>
<b>dataset</b>	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

<b>delivery method</b>	<p>In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.</p> <p>In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.</p>
<b>delivery method type</b>	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
<b>directory information tree</b>	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
<b>document sequencing</b>	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
<b>dynamic detail tree</b>	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
<b>edit table</b>	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
<b>effective date</b>	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
<b>EIM ledger</b>	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
<b>elimination set</b>	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
<b>entry event</b>	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
<b>equitization</b>	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
<b>event</b>	<p>A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.</p> <p>In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.</p>
<b>event propagation process</b>	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
<b>exception</b>	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
<b>exclusive pricing</b>	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
<b>fact</b>	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
<b>forecast item</b>	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
<b>fund</b>	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
<b>generic process type</b>	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
<b>group</b>	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).  In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
<b>incentive object</b>	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
<b>incentive rule</b>	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
<b>incur</b>	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
<b>item</b>	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).  In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
<b>KPI</b>	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.  An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.



<b>LDIF file</b>	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
<b>learner group</b>	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
<b>learning components</b>	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
<b>learning environment</b>	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
<b>learning history</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
<b>ledger mapping</b>	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i> ) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
<b>library section</b>	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
<b>linked section</b>	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
<b>linked variable</b>	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
<b>load</b>	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
<b>local functionality</b>	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
<b>location</b>	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
<b>logistical task</b>	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

	laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
<b>market template</b>	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
<b>match group</b>	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
<b>MCF server</b>	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
<b>merchandising activity</b>	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
<b>meta-SQL</b>	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
<b>metastring</b>	Metastings are special expressions included in SQL string literals. The metastings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
<b>multibook</b>	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
<b>multicurrency</b>	The ability to process transactions in a currency other than the business unit's base currency.
<b>national allowance</b>	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
<b>node-oriented tree</b>	A tree that is based on a detail structure, but the detail values are not used.
<b>pagelet</b>	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
<b>participant</b>	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
<b>participant object</b>	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
<b>partner</b>	A company that supplies products or services that are resold or purchased by the enterprise.
<b>pay cycle</b>	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
<b>pending item</b>	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

<b>PeopleCode</b>	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
<b>PeopleCode event</b>	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
<b>PeopleSoft Internet Architecture</b>	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
<b>performance measurement</b>	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
<b>period context</b>	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
<b>plan</b>	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
<b>plan context</b>	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
<b>plan template</b>	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
<b>planned learning</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
<b>planning instance</b>	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
<b>portal registry</b>	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
<b>price list</b>	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
<b>price rule</b>	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

<b>price rule condition</b>	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
<b>price rule key</b>	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
<b>process category</b>	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
<b>process group</b>	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
<b>process definition</b>	Process definitions define each run request.
<b>process instance</b>	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
<b>process job</b>	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
<b>process request</b>	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
<b>process run control</b>	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
<b>product category</b>	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
<b>programs</b>	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
<b>progress log</b>	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
<b>project transaction</b>	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
<b>promotion</b>	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
<b>publishing</b>	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
<b>record group</b>	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
<b>record input VAT flag</b>	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

	<p>on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.</p>
<b>record output VAT flag</b>	<p>Abbreviation for <i>record output value-added tax flag</i>.</p> <p>See <i>record input VAT flag</i>.</p>
<b>reference data</b>	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
<b>reference object</b>	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
<b>reference transaction</b>	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
<b>regional sourcing</b>	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
<b>relationship object</b>	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
<b>remote data source data</b>	Data that is extracted from a separate database and migrated into the local database.
<b>REN server</b>	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
<b>requester</b>	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
<b>role</b>	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
<b>role user</b>	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
<b>roll up</b>	In a tree, to roll up is to total sums based on the information hierarchy.
<b>run control</b>	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
<b>run control ID</b>	A unique ID to associate each user with his or her own run control table entries.

<b>run-level context</b>	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
<b>search query</b>	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
<b>section</b>	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
<b>security event</b>	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
<b>serial genealogy</b>	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
<b>serial in production</b>	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
<b>session</b>	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
<b>session template</b>	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
<b>setup relationship</b>	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
<b>share driver expression</b>	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
<b>single signon</b>	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
<b>source transaction</b>	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
<b>SpeedChart</b>	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
<b>SpeedType</b>	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
<b>staging</b>	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

<b>statutory account</b>	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
<b>step</b>	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
<b>storage level</b>	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
<b>subcustomer qualifier</b>	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
<b>Summary ChartField</b>	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
<b>summary ledger</b>	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
<b>summary time period</b>	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
<b>summary tree</b>	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
<b>syndicate</b>	To distribute a production version of the enterprise catalog to partners.
<b>system function</b>	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
<b>TableSet</b>	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
<b>TableSet sharing</b>	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
<b>target currency</b>	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
<b>template</b>	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
<b>territory</b>	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
<b>TimeSpan</b>	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
<b>trace usage</b>	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
<b>transaction allocation</b>	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
<b>transaction state</b>	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
<b>Translate table</b>	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
<b>tree</b>	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
<b>unclaimed transaction</b>	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
<b>universal navigation header</b>	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
<b>user interaction object</b>	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
<b>variable</b>	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
<b>VAT exception</b>	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
<b>VAT exempt</b>	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
<b>VAT exoneration</b>	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
<b>VAT suspension</b>	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
<b>warehouse</b>	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.



<b>work order</b>	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
<b>worksheet</b>	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
<b>worklist</b>	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
<b>XML schema</b>	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
<b>yield by operation</b>	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
<b>zero-rated VAT</b>	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.



# Index

## A

- additional documentation viii
- All Price-by Key Fields page 8
- Application Code page 9
- application fundamentals vii
- arbitration plan 35
  - definition 1
  - setting up 38
- Arbitration Plan page 39
- Arbitration Tree 40

## C

- Cascading/Summed 11
- combined conditions 28
- comments, submitting xi
- common elements xi
- Conditions page 23
- consider all prices 17
- contact information xi
- cross-references x
- Customer Connection website viii

## D

- Distribution Accounts 12
- distribution codes 32
- documentation
  - printed viii
  - related viii
  - updates viii

## E

- Enterprise Pricer
  - configuring 8

## F

- Formulas page 28

## G

- giveaway 32
- glossary 69

## I

- item weight 14

## L

- lookup in priority order 17

## M

- Merchandising Type 12
- MMA Partners viii

## N

- notes x

## P

- Payment Terms 12
- PeopleBooks
  - ordering viii
- PeopleCode, typographical conventions ix
- PeopleSoft application fundamentals vii
- Period-to-Date 12
- prerequisites vii
- Price Action Type 11
- Price Dates 12
- price formulas 30
- Price List Fields page 6
- Price List page 18
- price lists 17
  - defining fields 6
  - definition 1
  - entering related objects 20
  - establishing 18
  - setting up 17
  - understanding 17
- price rule
  - formulas 28
- price rules 23
  - adding conditions in advanced mode 24
  - adding conditions in basic mode 24
  - conditions 23
  - definition 1
  - setting up 23
- Price Type 11
- price-by
  - adding additional key fields 14
  - defining key fields 4
  - establishing key fields 3
  - key fields, configuring 8

- transaction codes, configuring 9
- Price-by Key Field page 4
- price-lists
  - establishing fields 3
- pricing elements 1
- pricing key 14
- Pricing Keys page 47
- pricing simulator 43
  - definition 1
  - running 44
- pricing structure 1
- printed documentation viii
- Promotion Code 11

## R

- related documentation viii
- Related Objects page 20
- rule attributes 27
- rule conditions 27
- rule definition 28

## S

- Simulator page 44
- Stop Processing Here 12
- suggestions, submitting xi

## T

- terms 69
- terms and adjustment type 32
- typographical conventions ix

## U

- Use Grace Days 11

## V

- visual cues x

## W

- warnings x