

# **Sterling Business Center**

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## **Pricing Administration Guide**

**9.1.0.2**



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## Sterling Business Center Pricing Administration Overview

Using the pricing administration feature of IBM® Sterling Business Center, you can perform pricing-related tasks such as creating and managing price lists, pricing rules, and coupons that pertain to a pricing organization. Additionally, you can test that prices of the items will be calculated correctly when they are added to an order after configuring the price lists, pricing rules, and coupons. A price list is a list of prices defined for a set of items. Pricing rules and coupons are used to perform pricing adjustments to an order. However, these adjustments will be effective only if certain conditions are satisfied. While a pricing rule automatically impacts an order price, a coupon must be manually added to an order for it to affect the order price.

For example, if you want to offer computer products at lesser prices to a special customer, XYZ, you can create a price list, add the items to the price list, define the appropriate prices for these items, and assign the price list to XYZ. If you want to attract customers by providing promotional offers such as giving away an inexpensive item for free when another item is purchased, or providing a discount on the total amount charged to the customer based on the order total, you can create either pricing rules or coupons to perform such price adjustments to the order.

**Note:** When entering values in an ID field, such as Category ID, it is recommended that you use alpha-numeric characters in English, and standard symbols for other languages. You must avoid use of special characters in an ID field. For a complete list of special characters that you must **not** use in an ID field, contact your system administrator.

### Initial Configurations

To utilize the functionalities provided by Sterling Business Center to the maximum extent, ensure that the following rules are set appropriately in the Applications Manager before you start using the Sterling Business Center application:

- Maintain Absolute Adjustment
- Maintain Percent Adjustment
- Maintain Effective Dates On Price List Lines
- Maintain Quantity Tiers On Price List Lines
- Hide Item Unit Of Measure
- Charge categories required for pricing rule and coupon configurations
- Approval rule violation reasons required for creating approval rules

For more information about defining pricing organization rules, see the *Sterling Distributed Order Management: Configuration Guide*.



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## Log In to Sterling Business Center

To access the Sterling Business Center application and use its features, you must first log in to the application using a valid user ID and password. Only enterprise users can log in to the Sterling Business Center application.

**Note:** When you log in using a browser or a browser version that is not supported by Sterling Business Center, a warning dialog box is displayed to report browser incompatibility. If you continue using an unsupported browser or browser version, you may encounter user interface issues. For more information about the browsers and browser versions supported by Sterling Business Center, see the *Sterling Selling and Fulfillment Foundation: System Requirements Guide*.

To log in to the application:

1. Point your browser to the URL provided by your system administrator.
2. A new browser window is displayed. Enter your user ID and password, and click **Sign In**.

The Sterling Business Center home page is displayed.

**Note:** It is recommended that the timezone of the system where the browser is running is same as the logged-in user's timezone.

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## Using the Home Page

### An Introduction to Using the Pricing Administration Home Page

The home page is the first screen that is displayed after you log in to the Sterling Business Center application. If you want to navigate to the Home page at any point of time when using the application, click **Home** in the menu bar.

The home page enables you to perform various administration tasks. The tasks are grouped under their related business objects, which are in turn grouped under various modules. For example, the following groups of task hyperlinks are available under the Pricing module:


- **New Price List** and **Find Price List** hyperlinks under Price Lists
- **New Pricing Rule** and **Find Pricing Rule** hyperlinks under Pricing Rules
- **New Coupon** and **Find Coupon** hyperlinks under Coupons

The home page enables you to perform the following tasks:

- [Catalog Administration](#)
- [Storefront Management](#)
- [Merchandising Management](#)
- [Pricing Administration](#)
- [Execute Favorite Saved Searches](#)
- [Access Recently Modified Entities](#)
- [View Coupon Usage Chart](#)

**Note:** The administration tasks that you can perform, and the task-related information that you can view, are dependent on your context organization.

### Catalog Administration

Use this panel to perform a quick search for an item and to perform various catalog administration tasks. To search for an item, enter the unique identifier of the item in the **Quick Find Item** box and click . To perform various administration tasks, click the corresponding task hyperlink. The following table describes the tasks that can be performed from the home page for the Catalog module:

| Click... | To...   | Click...               | To...  |
|----------|---|------------------------|--|
| New Item | <ul style="list-style-type: none"><li>▪ Create a Regular Item</li><li>▪ Create a Bundle Item</li><li>▪ Create a Physical Kit Item</li><li>▪ Create an Item With Variations</li><li>▪ Create a Logical Kit Item</li><li>▪ Create a Dynamic Physical Kit Item</li></ul> | Manage Classifications | <ul style="list-style-type: none"><li>▪ View Classification List</li><li>▪ Create a Classification</li></ul> |

| Click...                   | To...  | Click...               | To...  |
|----------------------------|--|------------------------|--|
| Find Item                  | Search for an Item   | Manage Attributes      | <ul style="list-style-type: none"> <li>▪ Define the Attribute Domain Details</li> <li>▪ Create an Attribute Group</li> </ul> |
| Browse Maintenance Catalog | <ul style="list-style-type: none"> <li>▪ Define Master Catalog Details</li> <li>▪ Create a Category</li> <li>▪ Add an Asset to a Category</li> <li>▪ Modify Asset Details in a Category</li> <li>▪ Delete an Asset from a Category</li> <li>▪ Localize the Fields in the Sterling Business Center Application</li> </ul> | New Entitlement        | Create a Customer Entitlement  |
| Manage Catalogs            | <ul style="list-style-type: none"> <li>▪ Set a Catalog as an Active Selling Catalog</li> <li>▪ Create a Catalog</li> </ul>   | Find Entitlement       | Search for a Customer Entitlement  |
| New Service                | <ul style="list-style-type: none"> <li>▪ Create a Delivery Service</li> <li>▪ Create a Provided Service</li> <li>▪ Create a Value-Added Service</li> </ul>   | Test Entitlement Setup | Test a Customer Entitlement  |
| Find Service               | Search for a Service   | Launch Visual Modeler  | Launch the Visual Modeler  |
| Manage Catalog Indexes     | <ul style="list-style-type: none"> <li>▪ Generate a New Search Index</li> <li>▪ Generate an Incremental Search Index</li> <li>▪ Activate a Search Index</li> <li>▪ Delete a Search Index</li> <li>▪ Delete Search Indexes by Date</li> </ul>   |                        |  |

For more information about these tasks, see the *Sterling Business Center: Item Administration Guide*.

## Pricing Administration

The following table describes the tasks that can be performed from the home page for the Pricing module:

| Click...       | To...                               | Click...         | To...                                 |
|----------------|-------------------------------------|------------------|---------------------------------------|
| New Price List | <a href="#">Create a Price List</a> | New Pricing Rule | <a href="#">Create a Pricing Rule</a> |

| Click...           | To...  | Click...                 | To...   |
|--------------------|--|--------------------------|---|
| Find Price List    | <a href="#">Search for a Price List</a>          | Find Pricing Rule        | <a href="#">Search for a Pricing Rule</a>             |
| New Coupon         | <a href="#">Create a Coupon</a>                  | New Manual Pricing Rule  | <a href="#">Create a Manual Pricing Rule</a>          |
| Find Coupon        | <a href="#">Search for a Coupon</a>              | Find Manual Pricing Rule | <a href="#">Search and View a Manual Pricing Rule</a> |
| New Approval Rule  | <a href="#">Create an Approval Rule</a>          |                          |   |
| Find Approval Rule | <a href="#">Search and View an Approval Rule</a> |                          |   |

## Storefront Management

The following table describes the tasks that can be performed from the home page for the Storefront module:

| Click...                        | To...   | Click...         | To...                           |
|---------------------------------|---|------------------|---------------------------------|
| Manage Subcatalog Organizations | <ul style="list-style-type: none"> <li>▪ Add an Organization to a Subcatalog Organization List</li> <li>▪ Remove an Organization from a Subcatalog Organization List</li> </ul> | New Entitlement  | Create a Seller Entitlement     |
|                                 |   | Find Entitlement | Search for a Seller Entitlement |

For more information about these tasks, see the *Sterling Business Center: Item Administration Guide*.

## Merchandising Management

Use this panel to perform the following tasks:

- Manage merchandising aspects for an item
- Manage cross-sells for an item
- Manage up-sells for an item
- Manage alternatives for an item

To perform these tasks, click the  icon adjacent the **Enter Item** box to search for the identifier of the item. Select the corresponding option for the task, and click .

The following table describes the tasks that can be performed from the home page for the Merchandising module in addition to the tasks listed previously:

| Click...               | To...   |
|------------------------|---|
| Browse Selling Catalog | <ul style="list-style-type: none"><li>▪ Define Master Catalog Details</li><li>▪ Create a Category</li><li>▪ Add an Asset to a Category</li><li>▪ Modify Asset Details in a Category</li><li>▪ Delete an Asset from a Category</li><li>▪ Localize the Fields in the Sterling Business Center Application</li></ul> |

For more information about these tasks, see the *Sterling Business Center: Item Administration Guide*.

## Execute Favorite Saved Searches

The home page provides a **Favorite Searches** panel that enables you to quickly execute the saved searches marked as favorites. Only the first five favorite saved searches, which have been sorted in alphabetical order, are displayed in this panel. (To access the complete list of favorite saved searches, use the **Favorites** menu in the menu bar.) Click a saved search hyperlink to execute the corresponding saved search. The search screen is displayed with the search criteria and the search results populated.

## Access Recently Modified Entities

The home page provides a **Recently Modified** panel that enables you to quickly navigate to the entities that you modified recently. The five most recently modified entities are displayed as hyperlinks in the order of the modification time, with the most recently modified entity at the top of the list. Each hyperlink belongs to one of the following business objects:

- Item
- Service
- Price List
- Pricing Rule
- Coupon

The hyperlinks are displayed in the *<business object> : <ID of the business object>* format. For example, a price list which has the Price List ID set as SpecialCustomersPriceList will be displayed as follows:

Price List : SpecialCustomersPriceList

Click a hyperlink to view the details of the corresponding entity.

## View Coupon Usage Chart

The home page displays a chart that depicts the coupon usage information pertaining to your organization. However, the chart will be displayed only if you belong to a pricing organization. The chart provides a

graphical representation of the number of active coupons available for each coupon type. Each bar in the chart represents a coupon type, and the length of the bars represents the number of active coupons available for that coupon type.

---

## Change Your Context Organization

A context organization is the organization that you are administering at a given point in time. For example, you can administer two organizations, a pricing organization called PricingOrg1 and a catalog organization called CatalogOrg1. If you log in as a PricingOrg1 user, your context organization will be set to PricingOrg1 immediately after you log in. PricingOrg1 will be the organization that you can administer immediately after you log in.

Based on your context organization, you will be able to perform certain administration tasks and view certain task-related information. The corresponding menu items and related tasks will be displayed based on the context organization. For example, if you log in as a pricing organization user, you will be able to perform pricing administration tasks such as creating a price list, managing a price list, and so on. However, you will only have read-only access to certain catalog administration tasks such as modifying the details of an item, and you will not have access to certain catalog administration tasks such as creating an item.

If you can administer more than one organization, you can change your context organization to the organization you want to administer at any point of time after logging in to the application.

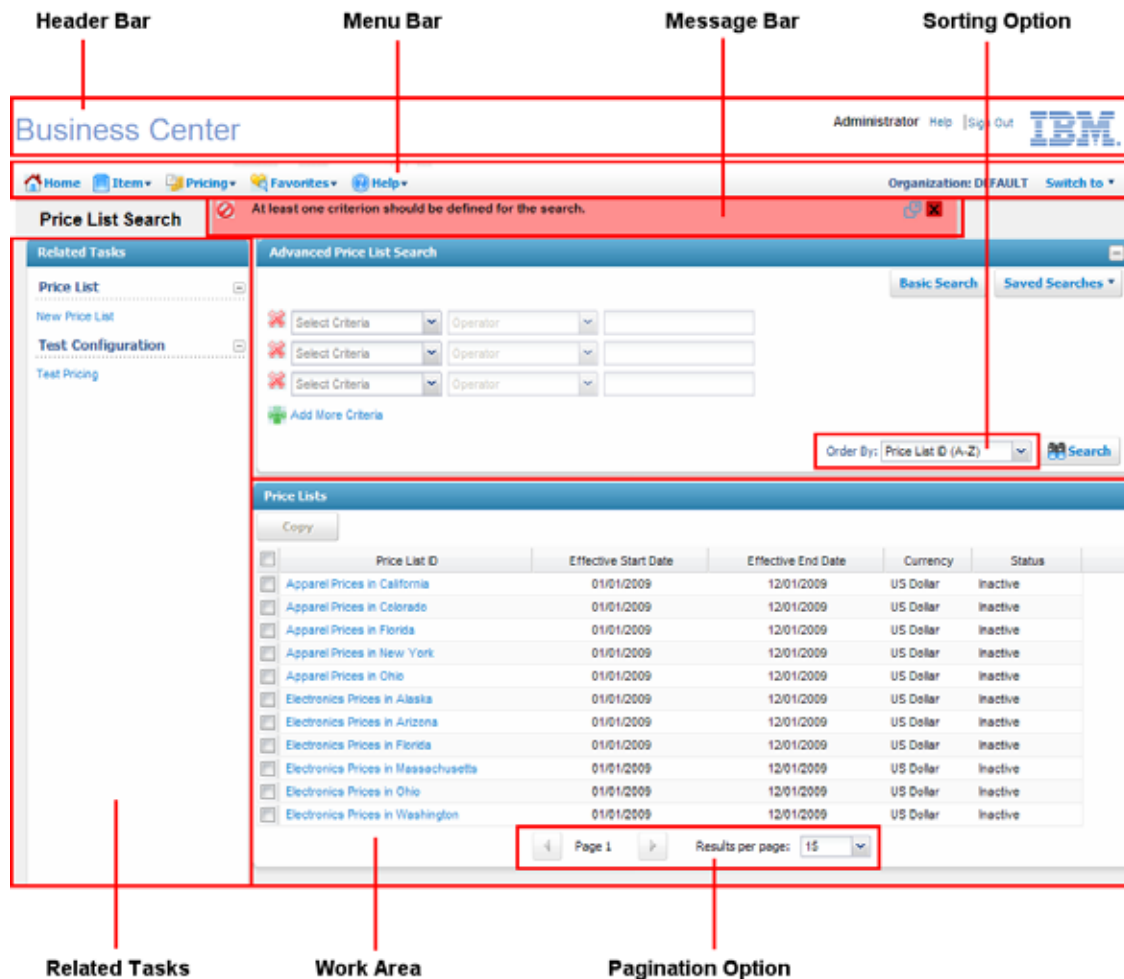
To change the context organization:

1. From the **Switch To** drop-down list in the application header bar, select the organization that you want to administer. The **Switch To** drop-down list displays the list of organizations that are administered by your organization.
2. The application home page is displayed, showing the menu items and tasks applicable to the organization that you have selected. For example, if you logged in as a pricing organization user and you change your context organization to a catalog organization, you will be able to perform all the catalog administration tasks such as managing a catalog, creating a service, and so on. However, you will only have read-only access to certain pricing administration tasks such as modifying the details of a coupon.

# Understanding the Sterling Business Center Application User Interface

Familiarizing yourself with the layout of the Sterling Business Center application and the navigational mechanism used in the application will help you use the application more efficiently.

The following figure illustrates the user interface layout:





The application user interface allows you to expand and collapse the panels in managing the work area, thus enabling you to manage your work area efficiently.



The user interface comprises the following elements:

- Header Bar - The header bar displays the following information and hyperlinks:
  - Application Name - The name of the application, in this case, Sterling Business Center.
  - User Name - The name of the user who has logged in to the application.
  - Sign out - Click this hyperlink to log out of the application.





























- **Menu Bar** - This comprises various menu options or tasks provided in the application. Select the appropriate option that you want to perform. You can click **Home** to navigate directly to the application's Home page. In order to view the context-sensitive help describing the current screen, and to know about the application, click **Help** in the Menu bar.
- **Message Bar** - This displays any status updates, warning messages, or error messages to provide assistance when performing a task.
- **Related Tasks** - This panel displays all the related tasks that you can perform. These related tasks are dynamically populated based on the task you are currently performing.
- **Work Area** - This is the area within the application window where you can view and modify details pertaining to the current task.
- **Pagination** - The search results are displayed in multiple pages. In order to view the search results across the multiple pages, click  to navigate to the previous page and click  to navigate to the next page.

You can also determine the number of search results that are displayed on each page. From the **Results per page** drop-down list, select an option. For example, if you select 10, when you are viewing the search results for the items in a list, ten items will be displayed in ten rows.




- **Sorting** - You can sort the search results, as required. From the **Order By** drop-down list, select the required option. For example, when searching for items, you can sort the search results in either an ascending or a descending order.
- **Icons** - In the Sterling Business Center application, you can perform certain tasks by clicking the corresponding icons in the UI. For example, you can click  adjacent the Date field to select a date. However, a few icons only indicate a condition, and cannot be used to perform tasks. For example,  pertaining to a column in a grid indicates that the column is both an editable field and a mandatory field.

The following table lists the icons that can be used to perform certain tasks across the Sterling Business Center application:


| Icon  | Action   |
|---|--|
|  | Click this icon to view the details of the selected entity.  |
|  | Click this icon to view a list of available values for an entity. For example, click  to view a list of classification values when creating an item with variation. |
|  | Click this icon to localize the corresponding field.   |
|  | Click this icon to select a date.  |
|  | Click this icon to move an entity one place higher in a list. For example, you can click  to modify the sequence of an item instruction in the Instructions screen. |
|  | Click this icon to move an entity one place lower in a list. For example, you can click  to modify the sequence of an item instruction in the Instructions screen.  |

| Icon  | Action  |
|---|---|
|    | Click this icon to move an entity from one table to another table. For example, you can select a classification usage from the <b>Subscribed Usages</b> table, and click  to move the selected classification usage to the <b>Available Usages</b> table and vice versa in the Classification Management screen. |
|    | Click this icon to move an entity from one table to another table. For example, you can select a classification usage from the <b>Available Usages</b> table, and click  to move the selected classification usage to the <b>Subscribed Usages</b> table in the Classification Management screen.                |
|    | Click this icon to move all the entities from one table to another table. For example, you can click  to move all the classification usages from the <b>Subscribed Usages</b> table to the <b>Available Usages</b> table in the Classification Management screen.  |
|    | Click this icon to move all the entities from one table to another table. For example, you can click  to move all the classification usages from the <b>Available Usages</b> table to the <b>Subscribed Usages</b> table in the Classification Management screen.  |
|    | Click this icon to add a new condition or criteria. For example, click  to add a new criteria when performing an advanced search for an entity.  |
|    | Click this icon to delete an existing condition or criteria. For example, click  to delete an existing criteria when performing an advanced search for an entity.  |
|  | Click this icon to view the next page when search results are displayed in multiple pages.  |
|  | Click this icon to view the previous page when search results are displayed in multiple pages.  |
|  | Click this icon to mark a saved search as a favorite.   |
|  | Click this icon to remove the favorite saved search from the favorite saved searches list.  |
|  | Click this icon in the Message bar for more details about an error message.   |

The following table lists the icons that indicate a condition across the Sterling Business Center application:

| Icon  | Description   |
|---|---|
|  | Indicates that the corresponding field is a mandatory field.                      |
|  | Indicates that the corresponding column in a grid is both editable and mandatory. |
|  | Indicates that the corresponding column in a grid is editable but not mandatory.  |

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| Icon  | Description  |
|---|--|
|  | <p>Indicates that an entity can be dragged and dropped within a group to modify its sequence or between tables to modify selections.</p> <p>For example, to modify the sequence of an attribute within a group in the <b>Item Attributes</b> tree, you can drag and drop the attribute to the required position in the Attribute Management screen. Similarly, to modify the selection of a classification usage, you can drag and drop the classification usage from the <b>Subscribed Usages</b> table to the <b>Available Usages</b> table in the Classification Management screen.</p> |

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**Note:** Though the Web browser toolbar is hidden, you can perform actions such as navigating back to the previous page, refreshing the current page, and so on, using the browser hot keys. However, it is recommended that you do not do so.

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## Create a Price List

A price list is a list of prices defined for a set of items. Each price list is applicable to a particular customer or a group of customers for a particular duration. A pricing organization can define different price lists for customers based on various criteria. For example, a pricing organization can create a price list that is applicable to regular business customers and another price list that is applicable to only a few special business customers so that the prices for the special customers are less than that for the regular customers.

One price list can inherit the items and price information from another price list. When a price list has one or more dependent price lists inheriting the price information from it, that price list is called a master price list. For example, if an organization has three divisions to cater to customers in three different regions, the organization can create one master price list where the prices of all the items are defined, and three dependent price lists which inherit the items and price information from the master price list. A pricing organization user can either increase or decrease the prices that the dependent price list inherits from a master price list by a percentage.



A pricing organization can create multiple price lists to offer different prices to different customers. When a customer buys some items, the price of these items is calculated based on the price lists assigned to that customer.

The price list management process involves the following steps:

1. Creating a price list.
2. Adding items to the price list.
3. Adjusting the prices in the price list.
4. Assigning the price list to customers.


While a pricing organization user can only create or modify a price list, add items to a price list, or adjust the prices in a price list, an enterprise user can only assign a price list to customers.

To create a price list:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Price List**. Alternatively, click the **New Price List** hyperlink in the home page.
3. The Create Price List screen is displayed. In the **New Price List ID\*** box, enter a unique identifier for the price list. The Price List ID, which is used to identify the price list, must be unique for the pricing organization.
4. In the **Effective Start Date\*** field, select the start date by clicking the  icon, and select the start time from the drop-down list. The start date and start time indicate the date and time from which the price list becomes effective.
5. In the **Effective End Date\*** field, select the end date by clicking the  icon, and select the end time from the drop-down list. The end date and end time indicate the date and time until which the price list is effective.
6. From the **Currency\*** drop-down list, select the currency to be used for all the prices in the price list.

7. In the **Description\*** box, enter a brief description of the price list.
8. In the **Price List Items** panel, select the appropriate option.

The following table describes the options in the **Price List Items** panel:

| Option  | Description   |
|---|---|
| Add specific items to the price list later      | Select this option to add items to the price list after creating the price list.  |
| This is a dependent price list                  | <p>Select this option to indicate that the price list is an existing price list's dependent price list. When a price list inherits price information from another price list, the price list from which the price information is inherited is called a master price list, and the price list that inherits the price information is called a dependent price list of that master price list.</p> <p><b>Note:</b> When you select this option, the <b>Currency</b> drop-down list is disabled. This is because the currency for the price list will be inherited from the master price list.</p> <p>Click the  icon adjacent the <b>Master Price List ID</b> box to search for the master price list from which the items and prices will be inherited.</p> |
| Add all items in the catalog to this price list | Select this option to add all the items present in the catalog of the pricing organization to the price list.   |

9. Click **Save**.

**Note:** \* indicates that the field is mandatory.

The Price List Summary screen pertaining to the newly created price list is displayed.

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## Add Items to a Price List

### Add Items to a Price List Using Item-Based Search

After creating a price list, a pricing organization user can add more items to the price list for the prices of those items to also be defined by that price list. To add items to a price list, a pricing organization user must first search for the corresponding items.

Use the Item-Based search option to search for the items to add based on item search criteria.

To add items to a price list by searching for items based on criteria:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. In the **Basic Price List Search** panel, enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The price lists matching the search criteria are displayed. Click the **Price List ID** hyperlink or double-click the row corresponding to the price list.  
**Note:** If there is only one price list matching the search criteria, the details of the corresponding price list are automatically displayed.
5. The Price List Summary screen is displayed. Click the **Add Individual Items** related task.
6. The Add Items To Price List screen is displayed. In the **Item ID Contains** box under the **Item Based Search** tab, enter either the complete or partial ID of the item you want to search for.
7. In the **Item Short Description Contains** box, enter either the complete or partial description of the item you want to search for. For example, if the **Item Short Description** is A flat television panel, you can enter either panel, or television panel, as your search text.
8. Click the  icon adjacent the **Items In Category** box to search for the category to which the items belong. The Catalog Hierarchy dialog box is displayed. Navigate to the corresponding category and double-click the category. Alternatively, select the category and click **Select**.
9. Select the **Search only services and service options** check box to include services and service options in the item search result.
10. Click **Search**.
11. The items matching the search criteria are displayed. Perform either of the following tasks:
  - To add specific items to the price list, select the check boxes corresponding to the items you want to add, enter the list price of the items in the **List Price** column, the absolute adjustment to be made to the list price of the items in the **Absolute Adjustment (+/-)** column, the percentage adjustment to be made to the list price of the items in the **Percentage Adjustment (+/-)** column, and click **Add Selected Items**.
  - To add all the items to the price list, enter the list price of all the items in the corresponding **List Price** column, the absolute adjustment to be made to the list price of all the items in the

corresponding **Absolute Adjustment (+/-)** column, the percentage adjustment to be made to the list price of all the items in the corresponding **Percentage Adjustment (+/-)** column, and click **Add All Items in Search Results**.

**Notes:**

- The **Absolute Adjustment (+/-)** column is displayed only if the **Maintain Absolute Adjustment** rule is enabled in the Applications Manager.
- The **Percentage Adjustment (+/-)** column is displayed only if the **Maintain Percent Adjustment** rule is enabled in the Applications Manager.

The Price List Summary screen is displayed.

## Add Items to a Price List by Browsing Categories

After creating a price list, a pricing organization user can add more items to the price list for the prices of those items to also be defined by that price list. To add items to a price list, a pricing organization user must first search for the corresponding items.

Use the Browse Categories search option to search for the items by browsing the product categories.

To add items to a price list by browsing the product categories:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. In the **Basic Price List Search** panel, enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The price lists matching the search criteria are displayed. Click the **Price List ID** hyperlink or double-click the row corresponding to the price list.

**Note:** If there is only one price list matching the search criteria, the details of the corresponding price list are automatically displayed.

5. The Price List Summary screen is displayed. Click the **Add Individual Items** related task.
6. Click the **Browse Categories** tab.
7. The **Catalog Hierarchy** panel is displayed. Navigate to the category to which the items you want to add belong, and double-click that category.
8. The **Items** panel is displayed with the list of items that can be added to the price list from the selected category. The items that are already included in the price list are not displayed under the **Items** panel. Perform either of the following tasks:
  - To add specific items to the price list, select the check boxes corresponding to the items you want to add, enter the list price of the items in the **List Price** column (optional), the absolute adjustment to be made to the list price of the items in the **Absolute Adjustment (+/-)** column (optional), the percentage adjustment to be made to the list price of the items in the **Percentage Adjustment (+/-)** column (optional), and click **Add Selected Items**.

- To add all the items from the selected category to the price list, enter the list price of all the items in the corresponding **List Price** column (optional), the absolute adjustment to be made to the list price of all the items in the corresponding **Absolute Adjustment (+/-)** column (optional), the percentage adjustment to be made to the list price of all the items in the corresponding **Percentage Adjustment (+/-)** column (optional), and click **Add All Items in Category**.

**Notes:**

- The **Absolute Adjustment (+/-)** column is displayed only if the **Maintain Absolute Adjustment** rule is enabled in the Applications Manager.
- The **Percentage Adjustment (+/-)** column is displayed only if the **Maintain Percent Adjustment** rule is enabled in the Applications Manager.

The Price List Summary screen is displayed.



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## Delete an Item from a Price List

A pricing organization user can delete items from a price list if the user does not want the price of the item to be defined in the price list.

To delete an item from a price list:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. In the **Basic Price List Search** panel, enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The price lists matching the search criteria are displayed. Click the **Price List ID** hyperlink or double-click the row corresponding to the price list.

**Note:** If there is only one price list matching the search criteria, the details of the corresponding price list are automatically displayed.

5. The Price List Summary screen is displayed. Perform either of the following tasks:
  - If the item you want to delete from the price list is displayed in the **Items** tab, select the check box corresponding to the item, click **More Actions**, and select **Delete** from the drop-down menu.
  - If the item you want to delete from the price list is not displayed in the **Items** tab, search for the item by clicking the **Find Items Within Price List** related task. The **Find Items** panel is displayed. Enter the appropriate search criteria, and click **Search**. The items matching the search criteria are displayed in the **Search Results** panel. Select the check box corresponding to the item you want to delete from the price list, click **More Actions**, and select **Delete** from the drop-down menu.

The item is no longer displayed in the list of items.

---

## View the Dependent Price Lists of a Master Price List

A pricing organization user can view the dependent price lists of a master price list. A dependent price list is a price list that inherits the items and the prices of the items from a master price list.

To view the dependent price lists of a master price list:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. In the **Basic Price List Search** panel, enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The price lists matching the search criteria are displayed. Click the **Price List ID** hyperlink or double-click the row corresponding to the price list.

**Note:** If there is only one price list matching the search criteria, the details of the corresponding price list are automatically displayed.

5. The Price List Summary screen is displayed. Click the **View Dependent Price Lists** related task.

**Note:** The **View Dependent Price Lists** related task is displayed only if the price list is a master price list.

In the **Price Lists** panel, the dependent price lists of the price list are displayed.

---

## Activate or Deactivate a Price List

A price list can be in either **Active** status or **Inactive** status. A price list has an effect on the prices of the items in it only if the price list is in the Active status. A pricing organization user can assign a price list that is in the **Inactive** status to a customer, but that price list will have no impact on the price applied to the customer's order until it is activated.

A pricing organization user can change the status of a price list in order to activate or deactivate the price list.

To change the status of a price list:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. In the **Basic Price List Search** panel, enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The price lists matching the search criteria are displayed. Click the **Price List ID** hyperlink or double-click the row corresponding to the price list.

**Note:** If there is only one price list matching the search criteria, the details of the corresponding price list are automatically displayed.

5. The Price List Summary screen is displayed. Perform either of the following tasks:
  - If the price list status is **INACTIVE**, click **Activate** to activate the price list.
  - If the price list status is **ACTIVE**, click **Deactivate** to deactivate the price list.
6. Click **Save**.

---

## Adjust the Prices of Items Based on Quantity

An organization may sometimes have to adjust the quantity-based pricing information of some or all of the items in a price list. Quantity-based pricing is used when an organization wants to offer different prices to a customer based on the quantity ordered. For example, an organization may want to offer a discount of \$100 on the unit price of an item if the ordered quantity is between 100 and 199, and a discount of \$250 if the ordered quantity is between 200 and 299.

A pricing organization user can adjust the quantity-based pricing information of items in a price list.

To adjust the quantity-based prices for individual items in a price list:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. In the **Basic Price List Search** panel, enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The price lists matching the search criteria are displayed. Click the **Price List ID** hyperlink or double-click the row corresponding to the price list.

**Note:** If there is only one price list matching the search criteria, the details of the corresponding price list are automatically displayed.

5. The Price List Summary screen is displayed. Perform either of the following tasks:
  - If the items for which you want to adjust the prices are displayed in the **Items** tab, select the check box corresponding to the items and click **Adjust Prices**.
  - If the items for which you want to adjust the prices are not displayed in the **Items** tab, search for the items by clicking the **Find Items Within Price List** related task. The **Find Items** panel is displayed. Enter the appropriate search criteria, and click **Search**. The items matching the search criteria are displayed in the **Search Results** panel. Select the check box corresponding to the items for which you want to adjust the prices and click **Adjust Prices**.

Alternatively, click the **Create** hyperlink or the **Manage** hyperlink in the **Quantity Tiers** column to adjust the quantity-tiered prices for the corresponding item.

**Note:** The **Create** hyperlink will be displayed only if there are no quantity tiers defined for the item. The **Manage** hyperlink will be displayed only if there are one or multiple quantity tiers defined for the item.

6. The Adjust Prices dialog box is displayed. In the **List Price\*** box, enter the new list price of the item. The list price is the unit price of an item.
7. In the **Adjustment % (+/-)** box, enter the corresponding positive or negative amount to adjust the percentage of the list price of the item. To enter a positive amount, enter the number without a plus (+) sign before the number. To enter a negative amount, enter a minus (-) sign before the number. A

positive amount indicates the percentage of the amount to be added to the list price. A negative amount indicates the percentage of the amount to be discounted from the list price.

**Note:** You can modify this field only if the **Maintain Percent Adjustment** rule is enabled in the Applications Manager.

8. In the **Adjustment (+/-)** box, enter the positive or negative amount to make an absolute adjustment to the list price of the item. To enter a positive amount, enter the number without a plus (+) sign before the number. To enter a negative amount, enter a minus (-) sign before the number. A positive amount indicates the absolute amount to be added to the list price. A negative amount indicates the absolute amount to be discounted from the list price.

**Note:** You can modify this field only if the **Maintain Absolute Adjustment** rule is enabled in the Applications Manager.

9. Select the **Use a quantity-based tiered pricing for the item** check box to specify the quantity-based pricing information for the item.

10. In the **Quantity Tiers** area, perform the following steps for every quantity tier:

- a. In the **Greater Than Or Equal To** column, enter the start range of the quantity for the tier.

- b. In the **Less than** column, enter the end range of the quantity for the tier.

- c. In the **List Price** column, enter the list price of the item for the tier.

- d. In the **Absolute Adjustment (+/-)** column, enter the positive or negative amount to make an absolute adjustment to the list price of the item for the tier. To enter a positive amount, enter the number without a plus (+) sign before the number. To enter a negative amount, enter a minus (-) sign before the number. A positive amount indicates the absolute amount to be added to the list price. A negative amount indicates the absolute amount to be discounted from the list price.


**Note:** This field is displayed only if the **Maintain Absolute Adjustment** rule is enabled in the Applications Manager.

- e. In the **Percentage Adjustment (+/-)** column, enter the corresponding positive or negative amount to adjust the percentage of the list price of the item for the tier. To enter a positive amount, enter the number without a plus (+) sign before the number. To enter a negative amount, enter a minus (-) sign before the number. A positive amount indicates the percentage of the amount to be added to the list price. A negative amount indicates the percentage of the amount to be discounted from the list price.

**Note:** This field is displayed only if the **Maintain Percent Adjustment** rule is enabled in the Applications Manager.

- f. Click **Add Another Tier** to add a new quantity tier for the item.

- g. A new row is added. Repeat step a through step e to specify another quantity tier for the item.

Click the  icon to delete a quantity tier.

11. Click **Save And Continue** to save the changes and move to the next item to continue making the adjustments.

**Note:** The **Save And Continue** button is displayed only if you selected more than one item in the Price List Summary screen.

12. Click **Save And Close** to save the changes and close the Adjust Prices dialog box.

**Notes:**

- \* indicates that the field is mandatory.
- You cannot create multiple quantity tiers for an item with the same quantity range.

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## Adjust the Prices of Individual Items


A pricing organization user may sometimes have to adjust the prices of some or all the items in a price list. For example, an organization may want to reduce the price of all the electronic items because of rising competition in the electronics market.

A pricing organization user can adjust the prices of individual items in a price list.

To adjust the prices of individual items in a price list:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. In the **Basic Price List Search** panel, enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The price lists matching the search criteria are displayed. Click the **Price List ID** hyperlink or double-click the row corresponding to the price list.

**Note:** If there is only one price list matching the search criteria, the details of the corresponding price list are automatically displayed.

5. The Price List Summary screen is displayed. Click the **Find Items Within Price List** related task.
6. The Find Items Within Price List screen is displayed. Search for the items for which you want to adjust the prices by performing the following tasks:
  - a. In the **Item ID Contains** box, enter either the complete or partial ID of the items for which you want to adjust the price.
  - b. In the **Item Short Description Contains** box, enter either the complete or partial description of the item you want to search for. For example, if the **Item Short Description** is A flat television panel, you can enter either panel, or television panel, as your search text.
  - c. Click the  icon adjacent the **Items In Category** box to search for the category the items belong to. The Category Lookup dialog box is displayed. Navigate to the corresponding category and double-click the category. Alternatively, select the category and click **Select**.
  - d. Select the **Show items with zero price** check box to search for items which have zero as the price of the item.
  - e. Select the **Search only services and service options** check box to search for services and service related options only.
  - f. Click **Search**.

The items matching the search criteria are displayed.

7. Adjust the price of the items by modifying the following fields, as required:
  - **List Price:** Modify the list price of an item by entering a new price.

- **Percentage Adjustment(+/-):** Modify the percentage of the adjustments to be made to the list price of an item. A positive number indicates a percentage amount to be added to the list price. A negative number indicates a percentage amount to be discounted from the list price.

**Note:** You can modify this field only if the **Maintain Percent Adjustment** rule is enabled in the Applications Manager.

- **Absolute Adjustment (+/-):** Modify the absolute adjustments to be made to the list price of an item. A positive number indicates an absolute amount to be added to the list price. A negative number indicates an absolute amount to be discounted from the list price.

**Note:** You can modify this field only if the **Maintain Absolute Adjustment** rule is enabled in the Applications Manager.

8. Click **Save**.



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## Perform Mass Adjustment of Prices

Sometimes an organization may have to adjust the prices of all the items in a price list. For example, because of a fuel price hike, the organization may want to increase the price of all the items by 0.5%.

A pricing organization user can perform a mass adjustment of all the prices in a price list. A pricing organization user can either increase or decrease the prices of all the items in a price list either by a percentage amount or an absolute amount.

To perform mass adjustment of prices in a price list:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. In the **Basic Price List Search** panel, enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The price lists matching the search criteria are displayed. Click the **Price List ID** hyperlink or double-click the row corresponding to the price list.

**Note:** If there is only one price list matching the search criteria, the details of the corresponding price list are automatically displayed.

5. The Price List Summary screen is displayed. Select the corresponding check boxes of the price list lines for which you want to adjust the price, and click **Mass Adjust Prices**. Alternatively, to adjust the prices of all the price list lines in the price list, click the **Mass Adjust All Prices** related task.
6. The Mass Adjust Prices dialog box is displayed. Select the appropriate options.

The following table describes the options in the Mass Adjust Prices dialog box:

---

| Option              | Description   |
|---------------------|---|
| List Price          | Select this option to either increase or decrease the list price of a price list line or all the price list lines.  |
| Absolute Adjustment | Select this option to either increase or decrease the absolute adjustment for the price list line or all the price list lines.<br><b>Note:</b> This option is displayed only if the <b>Maintain Absolute Adjustment</b> rule is enabled in the Applications Manager.  |
| Percent Adjustment  | Select this option to either increase or decrease the percentage adjustment for the price list line or all the price list lines.<br><b>Note:</b> This option is displayed only if the <b>Maintain Percent Adjustment</b> rule is enabled in the Applications Manager. |

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| Option   | Description   |
|----------|---|
| Increase | <p>Select this option to increase the selected price list line property. For example, you can select this option to increase the list price of a price list line or all the price list lines by some percentage or an absolute amount.</p> <p>Select either of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>By percentage:</b> Select this option and enter an amount to increase the selected price list line property by a certain percentage. For example, you can select this option and enter an amount of 5% to increase the list price of all the items in a price list by 5%.</li> <li>▪ <b>By Absolute Amount:</b> Select this option and enter an amount to increase the selected price list line property by an absolute amount. For example, you can select this option and enter an amount of \$5 to increase the list price of all the items in a price list by \$5.</li> </ul>       |
| Decrease | <p>Select this option to decrease the selected price list line property. For example, you can select this option to decrease the absolute adjustment of a price list line or all the price list lines by some percentage or an absolute amount.</p> <p>Select either of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>By Percentage:</b> Select this option and enter an amount to decrease the selected price list line property by a certain percentage. For example, you can select this option and enter an amount of 5% to decrease the absolute adjustment of a price list line by 5%.</li> <li>▪ <b>By Absolute Amount:</b> Select this option and enter an amount to decrease the selected price list line property by an absolute amount. For example, you can select this option and enter an amount of \$10 to decrease the absolute adjustment of 5 price list lines by \$10.</li> </ul> |

7. Click **Save**.

---

## Adjust the Prices of Items Based on Date Range

Every price list is defined for a specific period of time during which these prices are effective. Sometimes an organization may have to modify the date range of an item's price because of certain factors. For example, if an organization wants to sell woollen clothing at a higher price in winter, the pricing organization user can modify the date range of the item and increase the item's price instead of creating a new price list.

A pricing organization user can adjust the date range of an item's price in a price list.

To adjust the date range of an item's price:



1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. In the **Basic Price List Search** panel, enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The price lists matching the search criteria are displayed. Click the **Price List ID** hyperlink or double-click the row corresponding to the price list you want to adjust the date range for.

**Note:** If there is only one price list matching the search criteria, the details of the corresponding price list are automatically displayed.

5. The Price List Summary screen is displayed. Perform either of the following tasks:
  - If the items for which you want to adjust the date range are displayed in the **Items** tab, select the check boxes corresponding to the items, click **More Actions**, and select **Set Date Based Prices** from the drop-down menu to adjust the date range for all the price list lines for that item.
  - If the items for which you want to adjust the date range are not displayed in the **Items** tab, search for the items by clicking the **Find Items Within Price List** related task. The **Find Items** panel is displayed. Enter the appropriate search criteria, and click **Search**. The items matching the search criteria are displayed in the **Search Results** panel. Select the check boxes corresponding to the items for which you want to adjust the date range, click **More Actions**, and select **Set Date Based Prices** from the drop-down menu to adjust the date range for all the price list lines for that item.

Alternatively, click the **Create** hyperlink or the date range hyperlink in the **Effective Date** column to adjust the date range for the selected price list line.

**Note:** The **Create** hyperlink will be displayed only if there is no date range defined for the item. The date range hyperlink will be displayed only if there are one or multiple date ranges defined for the item.

6. The Adjust Date Ranges dialog box is displayed. Perform the following tasks for every date range:
  - a. In the **Effective From** column, enter the date from which the list price of the item will be effective. Alternatively, click the  icon to select the date.
  - b. In the **Effective To** column, enter the date until which the list price of the item will be effective. Alternatively, click the  icon to select the date.

- c. In the **List Price** column, enter the list price of the item for the date range selected.
- d. In the **Adjustment (+/-)** column, enter the positive or negative amount to make an absolute adjustment to the item's list price for the date range selected. To enter a positive amount, enter the number without a plus (+) sign before the number. To enter a negative amount, enter a minus (-) sign before the number. A positive amount indicates the absolute amount to be added to the list price. A negative amount indicates the absolute amount to be discounted from the list price.


**Note:** You can modify this field only if the **Maintain Absolute Adjustment** rule is enabled in the Applications Manager.

- e. In the **Adjustment % (+/-)** column, enter the positive or negative amount to adjust the percentage of the item's list price for the selected date range. To enter a positive amount, enter the number without a plus (+) sign before the number. To enter a negative amount, enter a minus (-) sign before the number. A positive amount indicates the percentage of the amount to be added to the list price. A negative amount indicates the percentage of the amount to be discounted from the list price.

**Note:** You can modify this field only if the **Maintain Percent Adjustment** rule is enabled in the Applications Manager.

7. To add a new date range for the item, click **Add Date Range**. A new row for specifying the new date range is added. Repeat step a through step e to specify a new date range for the item.

**Note:** If you add a new date range, a new price list line will be created for the price list.

8. To delete a date range, click the  icon.

**Note:** If you delete a date range, the price list line corresponding to that date range will be deleted from the price list.

9. Click **Save**.

The Price List Summary screen is displayed.

---

## Assign a Price List to Customers

After a price list is created, an enterprise user can assign the price list to customers of the corresponding enterprise. Depending on the business requirements, an enterprise user can assign the price list to a set of customers who fulfill certain criteria. For example, an enterprise user can assign the price list to all business customers and all customers belonging to the Education vertical market. Sometimes, an enterprise may want to offer a discount to important customers. To achieve that, an enterprise can create a price list defining the discounted prices, and assign that price list to the corresponding customers. When a price list is assigned to specific customers, the prices defined in the price list will be applicable only to those customers.

**Note:** Only an enterprise user can assign a price list to customers.

To assign a price list to customers:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. In the **Basic Price List Search** panel, enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The price lists matching the search criteria are displayed. Click the **Price List ID** hyperlink or double-click the row corresponding to the price list.

**Note:** If there is only one price list matching the search criteria, the details of the corresponding price list are automatically displayed.


5. The Price List Summary screen is displayed. Under the **Assign To Customers** tab, the following tabs are displayed:
  - Generic Assignments
  - Customer Profile Assignments
  - Specific Assignments
6. Under the **Generic Assignments** tab, specify the generic assignments for the price list by selecting one or more of the following options:
  - **This price list is not assigned to any customer:** Select this option to assign the price list to customers at a later point of time. If you select this option, the products and the prices in the price list will not be applicable to any customer of the enterprise.
  - **This price list is applicable for all customers:** Select this option to assign the price list to all customers. If you select this option, the products and the prices in the price list will be applicable to all the customers of the enterprise.

- **This price list is applicable to the following customers:** Select this option to assign the price list to different types of customers such as anonymous users, all consumer customers, and all business customers. Select the appropriate check box.

The following table describes the check boxes under the **This price list is applicable to the following customers** option:

| Check Box              | Description  |
|------------------------|--|
| Anonymous users        | Select this check box to assign the price list to all the anonymous users. An anonymous user is a user who can add items to the cart without logging in to the Sterling Web application. If you select this check box, the prices in the price list will be applicable to all the anonymous users. |
| All consumer customers | Select this check box to assign the price list to all the consumer customers of the enterprise. If you select this check box, the prices in the price list will be applicable to all the consumer customers.   |
| All business customers | Select this check box to assign the price list to all business customers of the enterprise. If you select this check box, the prices in the price list will be applicable to all the business customers.   |

**Note:** If you select both the **All consumer customers** check box and the **All business customers** check box, the **Customer Profile Assignments** tab and the **Specific Assignments** tab are disabled. This is because the price list will be applicable to all consumer and business customers and you do not need to specify any customer attribute criteria using the **Customer Profile Assignments** tab or add specific business customers using the **Specific Assignments** tab. Similarly, if you select the **All business customers** check box without selecting the **All consumer customers** check box, only the **Specific Assignments** tab is disabled.

7. Under the **Customer Profile Assignments** tab, specify the criteria based on customer attributes such as **Vertical**, **Relationship Type**, **Membership Level**, and **Region**. The price list will be applicable to any customer who fulfills any of the criteria defined under this tab. For example, you can create a price list that will be applicable only to customers belonging to the Education vertical market or customers who are resellers. Click **Add** to add a customer attribute criteria. The Customer Rule dialog box is displayed. Add one or multiple criteria, as required, and click **Save**:
  - From the **Vertical** drop-down list, select the customer's vertical market, for example, **Education**, **Government**, and so on.
  - From the **Relationship Type** drop-down list, select the relationship type of the customer, for example, **Reseller**, **Retailer**, **Distributor**, and so on. The relationship type indicates the type of relationship the customer has with the enterprise.
  - From the **Membership Level** drop-down list, select the customer's membership level, for example, **Gold**, **Silver**, **Platinum**, and so on.
  - Click the  icon adjacent the **Region** box. The Regions dialog box is displayed. Select the appropriate region.

**Note:** It is mandatory that you select at least one criteria.

8. Under the **Specific Assignments** tab, add the ID and name of the business customers to whom you want to assign the price list. The price list will be applicable to all the customers defined under this tab. To add a customer, perform the following tasks:
  - a. Click **Add**.
  - b. The Customer Search dialog box is displayed. Enter the appropriate search criteria and click **Search**.
  - c. The ID and name of the customers matching the search criteria are displayed in the **Customer List** panel. Select the check boxes corresponding to the customers you want to add and click **Select**.
9. Click **Save**.

**Note:** The price list is assigned to customers who meet any of the criteria defined under the **Generic Assignments**, **Customer Profile Assignments**, and **Specific Assignments** tabs.

## Modify Customer Assignment Attributes

An enterprise user can modify the customer attributes based on which a price list is assigned to specific customers. In such a scenario, the enterprise user can modify the attributes displayed under the **Customer Profile Assignments** tab of the Price List Summary screen.

To modify attributes:

1. Under the **Customer Profile Assignments** tab, select the row containing the attributes that you want to modify, and click **Modify**. Alternatively, double-click the row containing the attributes that you want to modify.
2. The Customer Rule dialog box is displayed. Modify the appropriate fields, and click **Save**.

## Remove Customer Assignment Attributes

An enterprise user can remove the customer attributes based on which a price list is assigned to specific customers. In such a scenario, the enterprise user can remove the attributes displayed under the **Customer Profile Assignments** tab of the Price List Summary screen.

To remove attributes:

1. Under the **Customer Profile Assignments** tab, select the row of attributes that you want to remove, and click **Remove**.
2. A confirmation dialog box is displayed, asking whether you want to remove the assignment. Click **Yes**.  
The row of attributes is removed.

## Remove Specific Customer Assignments

If an enterprise user does not want a price list to be assigned to a specific customer, the user can remove the corresponding customer from the list of customers displayed under the **Specific Assignments** tab of the Price List Summary screen.

To remove a customer assignment:

1. Under the **Specific Assignments** tab, select the customer by selecting the corresponding check box, and click **Remove**.
2. A confirmation dialog box is displayed, asking whether you want to remove the assignments. Click **Yes**.

The row containing the ID and name of the customer is removed.



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## Search for a Price List

A user can search for a price list and view its details using the following options:

- **Basic price list search:** This type of search enables a user to perform a quick search by specifying basic criteria such as the complete or partial ID of the price list, the price list status, or the corresponding Item ID.
- **Advanced price list search:** This type of search enables a user to perform a search based on the criteria the user selects. The user can select the criteria and the corresponding operator, and then select or specify the corresponding values.

### Basic Price List Search

To perform a basic price list search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. Under the **Basic Price List Search** panel, in the **Price List ID Contains** box, enter either the complete or partial identifier of the price list you want to search for.
4. In the **Status** field, select one of the following options:
  - **All:** Select this option to search for all the price lists.
  - **Active:** Select this option to search only for price lists in the **Active** status.
  - **Inactive:** Select this option to search only for price lists in the **Inactive** status.
5. Click the  icon adjacent the **Price List Contains Item** box to search for an item that is present in the price list you want to search for. The Item Search screen is displayed. In the **Basic Item Search** panel, enter the search criteria and click **Search**. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search**. The items matching the search criteria are displayed. Select the item by clicking the corresponding **Item ID** hyperlink. Alternatively, select the corresponding check box and click **Select**.
6. Select the **Only include price lists that are effective today** check box to search for price lists which are valid for the current date.
7. Click **Search**. The price lists matching the search criteria are displayed. However, if there is only one price list matching the search criteria, the Price List Summary screen is displayed.

**Note:** If the administration organization is not a pricing organization, the price lists available for the pricing organization of the administration organization are displayed.

### Advanced Price List Search

To perform an advanced price list search:

1. Log in to Sterling Business Center as an administrator.

2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. Click **Advanced Search**.
4. In the **Advanced Price List Search** panel, from the **Select Criteria** drop-down list, select the criteria that you want to include in the search. For example, to search for a price list by the status of the price list, select **Price List Status** from the **Select Criteria** drop-down list.
5. From the **Operator** drop-down list, select the operator you want to use for the search criteria.

In the corresponding box, enter or select the appropriate value for the criteria. The boxes are displayed based on the operator you select. For example, if you select **Effective Start Date** from the **Select Criteria** drop-down list, and **Between** from the **Operator** drop-down list, two boxes in which you can enter or select the appropriate dates, are displayed.

**Note:** It is mandatory that you select or enter at least one search criteria and a corresponding value. If you enter more than one search criteria, the search will return the price lists that match all the criteria.

6. Click **Search**. The price lists matching the search criteria are displayed. However, if there is only one price list matching the search criteria, the Price List Summary screen is displayed.

**Note:** If the administration organization is not a pricing organization, the price lists that are available for the pricing organization of the administration organization are displayed.

## Add More Search Criteria

You can include additional search criteria to perform a more detailed search and narrow down the search results.

To include additional search criteria:

1. In the Advanced Price List Search screen, click **Add More Criteria**.
2. A new row for specifying the search criteria is displayed. Enter the appropriate search criteria, and click **Search**. The price lists matching the search criteria are displayed. However, if there is only one price list matching the search criteria, the Price List Summary screen is displayed.

**Note:** If the administration organization is not a pricing organization, the price lists that are available for the pricing organization of the administration organization are displayed.

## Save a Price List Search

You can save a price list search to avoid entering the search criteria every time you have to search for a particular price list.

To save a price list search:

1. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
2. The Price List Search screen is displayed. In the **Basic Price List Search** panel, enter the appropriate search criteria. Alternatively, click **Advanced Search** and enter the appropriate search criteria.

**Note:** It is mandatory that you enter at least one criteria.

3. From the **Saved Searches** drop-down menu, select **Create Saved Search**.

4. The Save Search dialog box is displayed. In the **Saved Search Name\*** box, enter a name for the search that is to be saved.
5. Select the **Include in favorite searches** check box to mark the saved search as a favorite. Marking a saved search as a favorite enables you to quickly navigate to that saved search from the home page. A maximum of five most recent favorite saved searches are displayed as hyperlinks under the **Favorite Searches** panel in the home page. You can also access the favorite saved searches using the **Favorites** menu in the header bar of the home page.
6. Click **Save**.

**Note:** \* indicates that the field is mandatory.

## Perform a Search Using a Saved Price List Search

To search for a price list using a saved price list search:

1. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the page.
2. The Basic Price List Search screen is displayed. Click **Saved Searches** to view the list of saved price list searches. Alternatively, click **Advanced Search** and then click **Saved Searches**.

The saved price list searches are displayed in a menu, with the favorite saved searches, if any, displayed at the top of the list.

**Note:** A maximum of eight saved searches are displayed in the menu.

3. Perform either of the following tasks:
    - If the saved search is displayed in the menu, click the saved search to view the corresponding search results.
    - If the saved search is not displayed in the menu, click **More Searches...** The Find Saved Searches for Price Lists dialog box is displayed. In the **Saved Search Name Contains** box, enter either the complete or partial saved search name to filter the list of saved searches displayed in the **Saved Searches** panel. Double-click a saved search name to view the corresponding search results. Alternatively, click a saved search name and click **Select** to view the corresponding search results.
- Note:** The **More Searches...** button is displayed only if there are more than eight saved price list searches.

The Price List Search screen is displayed with the search criteria filled in along with the search results.

## Modify a Saved Price List Search

To modify a saved price list search:

1. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.

2. The Basic Price List Search screen is displayed. Click **Saved Searches** to view the list of saved price list searches. Alternatively, click **Advanced Search** and then click **Saved Searches**.

The saved price list searches are displayed in a menu, with the favorite saved searches, if any, displayed at the top of the list.

**Note:** A maximum of eight saved searches are displayed in the menu.

3. Perform either of the following tasks:
  - If the saved search is displayed in the menu, click the saved search to view the corresponding search screen.
  - If the saved search is not displayed in the menu, click **More Searches...** The Find Saved Searches for Price Lists dialog box is displayed. In the **Saved Search Name Contains** box, enter either the complete or partial saved search name to filter the list of saved searches displayed in the **Saved Searches** panel. Double-click a saved search name to view the corresponding search screen. Alternatively, click a saved search name and click **Select** to view the corresponding search screen.  
**Note:** The **More Searches...** button is displayed only if there are more than eight saved price list searches.
4. The Price List Search screen is displayed with the search criteria filled in. Modify the appropriate information, and select **Create Saved Search** from the **Saved Searches** drop-down menu.
5. The Save Search dialog box is displayed, with the name of the original saved search populated in the **Saved Search Name\*** box. Perform one of the following tasks:
  - To overwrite the original saved search, leave the name as is. The Confirm Overwrite dialog box, which contains a message asking you for confirmation about proceeding with the update of the original saved search, is displayed. Click **Yes**.
  - To save the search under a new name, enter a name for the search.
6. Select the **Include in favorite searches** check box to include the saved search in the list of favorites. Marking a saved search as a favorite enables you to quickly navigate to that saved search from the home page. A maximum of five most recent favorite saved searches are displayed as hyperlinks under the **Favorite Searches** panel in the home page. You can also access the favorite saved searches using the **Favorites** menu in the header bar of the home page.
7. Click **Save**.

**Note:** \* indicates that the field is mandatory.

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## Modify Price List Details

An enterprise user or a pricing organization user can modify the details pertaining to a price list. A pricing organization user can modify the description of a price list, the date range within which a price list is effective, and the status of a price list, and adjust the prices of the items in a price list. An enterprise user can only modify the assignment of customers for a price list. If the pricing organization is an enterprise, users belonging to that organization can modify all the details pertaining to a price list, including the prices of the items and the assignment of the price list to customers.



To modify the details of a price list:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. In the **Basic Price List Search** panel, enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The price lists matching the search criteria are displayed. Click the **Price List ID** hyperlink or double-click the row corresponding to the price list.

**Note:** If there is only one price list matching the search criteria, the details of the corresponding price list are automatically displayed.

5. The Price List Summary screen is displayed. Modify the appropriate fields.

As a pricing organization user, you can modify the following fields:

- **Description\*:** Modify the description of the price list, as appropriate.
- **Effective Start Date\*:** Modify the start date and start time of the price list by clicking the corresponding  icon and selecting the time from the drop-down list. The start date and start time indicate the date and time from which the price list becomes effective.
- **Effective End Date\*:** Modify the end date and end time of the price list by clicking the corresponding  icon and selecting the time from the drop-down list. The end date and end time indicate the date and time until which the price list is effective.
- **For price range filtering, use prices on this price list:** Select or clear this check box depending on whether or not you want to use the prices defined in the price list to filter the price range when generating the search index.
- **List Price:** Modify the list price of an item by entering a new price.
- **Adjustment % (+/-):** Modify the percentage of the adjustments to be made to the list price of an item. A positive number indicates a percentage amount to be added to the list price. A negative number indicates a percentage amount to be discounted from the list price.

**Note:** You can modify this field only if the **Maintain Percent Adjustment** rule is enabled in the Applications Manager.

- **Absolute Adjustment (+/-):** Modify the absolute adjustments to be made to the list price of an item. A positive number indicates an absolute amount to be added to the list price. A negative number indicates an absolute amount to be discounted from the list price.

**Note:** You can modify this field only if the **Maintain Absolute Adjustment** rule is enabled in the Applications Manager.

**Note:** \* indicates that the field is mandatory.

As a pricing organization user, you can perform the following tasks:

- [Activate or Deactivate a Price List](#)
- [Delete a Price List](#)
- [Add Items to a Price List](#)
- [Adjust the Prices of Individual Items](#)
- [Perform Mass Adjustment of Prices](#)
- [Delete an Item from a Price List](#)
- [Adjust the Prices of Items Based on Quantity](#)
- [Adjust the Prices of Items Based on Date Range](#)
- [Copy a Price List](#)

As an enterprise user, you can perform the following task:

- [Assign a Price List to Customers](#)

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## Search for a Customer

To assign an entity such as a price list, a pricing rule, or a coupon to specific customers, an enterprise user can search for the customer to whom the entity is to be assigned.

An enterprise user can search for a customer while performing the following tasks:

- [Assign a Price List to Customers](#)
- [Assign a Pricing Rule to Customers](#)
- [Assign a Coupon to Customers](#)

To search for a customer:

1. In the **Specific Assignments** panel, click **Add**.
2. The Customer Search dialog box is displayed. In the **E-mail Starts With** box, enter either the complete or partial E-mail ID of the customer.
3. In the **Last Name** box, enter the customer's last name.
4. In the **Day Phone #** box, enter the customer's day phone number. Ensure that you do not enter space or special characters when entering the phone number. Otherwise, customers matching the search criteria are not displayed in the **Customer List** panel.
5. In the **First Name** box, enter the customer's first name.
6. In the **Customer ID** box, enter the unique identifier of the customer.
7. In the **Zip Code** box, enter the zip code of the city to which the customer belongs.
8. Click **Search**.

The ID and name of the customers matching the search criteria are displayed in the **Customer List** panel.

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## Save a Search

You can save a search to avoid entering the search criteria every time you search for a particular entity such as a price list, a pricing rule, or a coupon.

You can save a search using the **Saved Searches** button in the Basic Search screen and Advanced Search screen.

To save a search:

1. From the **Saved Searches** drop-down menu, select **Create Saved Search**.
2. The **Save Search** dialog box is displayed. In the **Saved Search Name\*** box, enter a name for the search that is to be saved.
3. Select the **Include in favorite searches** check box to mark the saved search as a favorite. Marking a saved search as a favorite enables you to quickly navigate to that saved search from the home page. A maximum of five most recent favorite saved searches are displayed as hyperlinks under the **Favorite Searches** panel in the home page. You can also access the favorite saved searches using the **Favorites** menu in the header bar of the home page.
4. Click **Save**.

**Note:** \* indicates that the field is mandatory.



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## Copy a Price List

A pricing organization user can create a new price list from an existing price list by copying it. When a user copies a price list, all the items and prices defined in the original price list are copied to the new price list.

**Note:** The status of the new price list created using the copying function will be set to **INACTIVE** even if the status of the price list from which it is copied is **ACTIVE**.

To copy a price list:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. In the **Basic Price List Search** panel, enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. If there is only one price list matching the search criteria, the Price List Summary screen is displayed. Click the **Copy Price List** related task. If there are multiple price lists matching the search criteria, the list of price lists is displayed. Perform either of the following tasks:
  - Select the price list you want to copy by selecting the corresponding check box, and click **Copy**.  
**Note:** You can copy only one price list at a time.
  - Click the **Price List ID** hyperlink or double-click the row corresponding to the price list you want to copy. In the Price List Summary screen, click the **Copy Price List** related task.
5. The Copy Price List dialog box is displayed. In the **New Price List ID\*** box, enter a unique identifier for the new price list.
6. Click **Create**.

The Price List Summary screen pertaining to the new price list is displayed.

**Note:** \* indicates that the field is mandatory.

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## Delete a Price List

A pricing organization user can delete a price list, if required.

To delete a price list:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Price List**. Alternatively, click the **Find Price List** hyperlink in the home page.
3. The Price List Search screen is displayed. In the **Basic Price List Search** panel, enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The price lists matching the search criteria are displayed. Click the **Price List ID** hyperlink or double-click the row corresponding to the price list.

**Note:** If there is only one price list matching the search criteria, the details of the corresponding price list are automatically displayed.

5. The Price List Summary screen is displayed. Click **Delete**.

**Note:** The **Delete** button is enabled only if the status of the price list is **Inactive**.

The price list is deleted and the home page is displayed.

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## Create a Pricing Rule

A pricing rule is used to perform pricing adjustments to an order that will be applicable only if certain conditions are satisfied. A pricing rule is characterized by conditions and effects. When a condition pertaining to a pricing rule is satisfied, the corresponding effect is applied to the price on the order.

The effect of a pricing rule can either be a discount or a surcharge. Discounts can be an absolute amount, a percentage amount, or a flat fee. A pricing rule that modifies the price applied to an order by an absolute amount can be applied only to a single currency. A pricing rule that modifies the price applied to an order by a percentage amount can be applied to either a single currency or all currencies.

While a pricing organization user can only create or modify a pricing rule, an enterprise user can only assign a pricing rule to customers.

A pricing organization user can create the following types of pricing rules:

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| To Create Pricing Rule of Type | Click Here  |
|--------------------------------|---|
| Combination                    | <a href="#">Create a Pricing Rule Based on the Combination of Items Ordered</a> |
| Item Quantity                  | <a href="#">Create a Pricing Rule Based on Item Quantity</a>                    |
| Order Total                    | <a href="#">Create a Pricing Rule Based on the Order Total</a>                  |
| Ship Order Total               | <a href="#">Create a Pricing Rule Based on the Ship Order Total</a>             |
| Shipping Surcharge             | <a href="#">Create a Pricing Rule Based on Shipping Surcharge</a>               |

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## Create a Pricing Rule Based on the Combination of Items Ordered

A combination pricing rule is a type of pricing rule that changes the price of an item based on the combination of items being ordered. For example, an organization can create a pricing rule under which, for every home theatre system a customer buys, the customer gets a free DVD player.



Only a pricing organization user can create a pricing rule based on the combination of items ordered.


To create a pricing rule based on the combination of items ordered:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Pricing Rule**. Alternatively, click the **New Pricing Rule** hyperlink in the home page.
3. The Create Pricing Rule screen is displayed. Select the **Combination** option.
4. In the **Pricing Rule ID\*** box, enter a unique identifier for the pricing rule. The Pricing Rule ID, which is used to identify the pricing rule, must be unique for the pricing organization.  
**Note:** Pricing rules and coupons cannot share the same identifier. For example, if you enter XYZ in the **Pricing Rule ID\*** box, and if a coupon with XYZ as the Coupon ID exists, an error message is displayed.
5. Click **Submit**.
6. The Pricing Rule Summary screen is displayed. In the **Pricing Rule Information** panel, the Pricing Rule Type you selected and the Pricing Rule ID you entered are displayed. In the **Pricing Rule Description\*** box, enter a brief description of the pricing rule.
7. In the **Effective Start Date\*** field, select the start date by clicking the  icon, and select the start time from the drop-down list. The start date and start time indicate the date and time from which the pricing rule becomes effective.
8. In the **Effective End Date\*** field, select the end date by clicking the  icon, and select the end time from the drop-down list. The end date and the end time indicate the date and time until which the pricing rule is effective.
9. Select the **Apply even if the item price has been manually overridden** check box to apply the pricing rule even after the item's price has been manually overridden.

10. In the **Conditions** tab, enter the appropriate information.

The following table describes the fields in the **Conditions** tab of the Pricing Rule Summary screen:

| Field  | Description  |
|--|--|
| IF An order is placed in <currency name or any> currency   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>From the drop-down list, select the currency used in the order, for example, <b>USD</b>, <b>Euro</b>, and so on.</li> <li>Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.</li> </ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the pricing rule to apply only a percentage discount or a percentage surcharge, and not an absolute discount or an absolute surcharge on the price applied to the order.</p>   |
| AND the order contains <any or all> of the following items | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>any:</b> One of the conditions under which the pricing rule will function is that the order must contain at least one of the items you will specify in the Item ID fields.</li> <li><b>all:</b> One of the conditions under which the pricing rule will function is that the order must contain all the items you will specify in the Item ID fields.</li> </ul>   |
| Item ID*   | <p>Click the  icon to search for the item that the order must contain for the pricing rule to function. The Basic Item Search screen is displayed. Enter the search criteria and click <b>Search</b>. Alternatively, click <b>Advanced Search</b>, enter the search criteria, and click <b>Search</b>. The items matching the search criteria are displayed. Select the item by clicking the corresponding <b>Item ID</b> hyperlink. Alternatively, select the corresponding check box and click <b>Select</b>.</p>   |
| with a quantity of*  | <p>Enter the minimum quantity of the item that the order must contain for the pricing rule to function.</p>  |
| Add Item   | <p>Click this to specify an additional item. A new row for specifying the item and the minimum quantity of the item is displayed. Enter the identifier of the item and the minimum quantity of the item.</p> <p>To delete an item, click the  icon corresponding to the item you want to delete.</p> <p><b>Note:</b> You cannot define a pricing rule by adding an Item ID multiple times.</p>  |
| THEN Apply   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>an absolute discount:</b> Select this option to apply an absolute discount on the item if the specified conditions are met. <ul style="list-style-type: none"> <li><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> </ul> </li> <li><b>a percentage discount:</b> Select this option to apply a percentage discount on the item if the specified conditions are met.</li> <li><b>an absolute surcharge:</b> Select this option to apply an absolute surcharge on the item if the specified conditions are met. <ul style="list-style-type: none"> <li><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> </ul> </li> <li><b>a percentage surcharge:</b> Select this option to apply a percentage surcharge on the item if the specified conditions are met.</li> </ul> |

| Field  | Description  |
|--|--|
| of* <discount amount or surcharge amount>  | Enter the amount to be either discounted from the price or charged as surcharge. For example, if you enter an absolute discount of \$25, the amount of \$25 will be discounted from the price if the specified conditions are met.   |
| to the item*   | Click the  icon to search for the item to which the discount or surcharge is to be applied. The Basic Item Search screen is displayed. Enter the search criteria and click <b>Search</b> . Alternatively, click <b>Advanced Search</b> , enter the search criteria, and click <b>Search</b> . The items matching the search criteria are displayed. Select the item by clicking the corresponding <b>Item ID</b> hyperlink. Alternatively, select the corresponding check box and click <b>Select</b> .   |
| each   | Select one of the following options: <ul style="list-style-type: none"> <li>▪ <b>for one quantity on the order:</b> Select this option to apply the discount or surcharge on a single unit of the items you specified in the Item ID fields earlier.</li> <li>▪ <b>for every occurrence of the item on the order:</b> Select this option to apply the discount or surcharge on all the units of the items specified in the Item ID fields earlier.</li> <li>▪ <b>once for each combination of items above:</b> Select this option to apply the discount or surcharge on each combination of the items specified earlier. For example, if you specify that a customer will get a 10% discount on 1 bag of popcorn if the customer orders two movies, the customer will get only a 10% discount on one bag of popcorn even if the customer orders two movies and purchases three bags of popcorn. However, if the customer orders four movies, the customer will get a 10% discount on two bags of popcorn.</li> </ul> |
| For analytics and accounting purpose, the <discount or surcharge> shall be collected against the charge name | From the drop-down list, select the charge name that is to be associated with the discount or surcharge. The charge name is used to track the amount of discount or surcharge that has been applied to an order.   |

11. Click **Submit**.

**Note:** \* indicates that the field is mandatory.



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## Create a Pricing Rule Based on Item Quantity

An item quantity pricing rule is a type of pricing rule that changes the unit price of an item based on the quantity of items being ordered. For example, an organization can create a pricing rule under which a customer can get a discount of \$50 if the customer buys three shirts, and a discount of \$150 if the customer buys six shirts.





Only a pricing organization user can create a pricing rule based on item quantity.

To create a pricing rule based on item quantity:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Pricing Rule**. Alternatively, click the **New Pricing Rule** hyperlink in the home page.
3. The Create Pricing Rule screen is displayed. Select the **Item Quantity** option.
4. In the **Pricing Rule ID\*** box, enter a unique identifier for the pricing rule. The Pricing Rule ID, which is used to identify the pricing rule, must be unique for the pricing organization.  
**Note:** Pricing rules and coupons cannot share the same identifier. For example, if you enter XYZ in the **Pricing Rule ID\*** box, and if a coupon with XYZ as the Coupon ID exists, an error message is displayed.
5. Click **Submit**.
6. The Pricing Rule Summary screen is displayed. In the **Pricing Rule Information** panel, the Pricing Rule Type you selected and the Pricing Rule ID you entered are displayed. In the **Pricing Rule Description\*** box, enter a brief description of the pricing rule.
7. In the **Effective Start Date\*** field, select the start date by clicking the  icon, and select the start time from the drop-down list. The start date and start time indicate the date and time from which the pricing rule becomes effective.
8. In the **Effective End Date\*** field, select the end date by clicking the  icon, and select the end time from the drop-down list. The end date and the end time indicate the date and time until which the pricing rule is effective.
9. Select the **Apply even if the item price has been manually overridden** check box to apply the pricing rule even when the price of the item defined by the pricing rule has been manually overridden.

10. In the **Conditions** tab, enter the appropriate information.

The following table describes the fields in the **Conditions** tab of the Pricing Rule Summary screen:

| Field  | Description   |
|--|---|
| IF An order is placed in <currency name or any> currency   | Select one of the following options: <ul style="list-style-type: none"> <li>▪ From the drop-down list, select the currency used in the order, for example, <b>USD</b>, <b>Euro</b>, and so on.</li> <li>▪ Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.</li> </ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the pricing rule to apply only a percentage discount or a percentage surcharge, and not an absolute discount or an absolute surcharge on the price applied to the order.</p>   |
| AND IF the order contains items where the item's <attribute or Item ID> is in the following list | Select one of the following options: <ul style="list-style-type: none"> <li>▪ <b>attribute:</b> One of the conditions under which the pricing rule will function is that the order must contain items with the attributes you will specify in the Attribute ID fields.<br/>               To specify an attribute, in the <b>Attribute ID</b> box, click the  icon to search for the corresponding Attribute ID.<br/>               To add a new attribute, click <b>Add Attribute</b>. To remove an attribute, click the  icon corresponding to the attribute you want to remove.<br/> <b>Notes:</b> <ul style="list-style-type: none"> <li>- You cannot define a pricing rule by adding an attribute multiple times.</li> <li>- Computed, Derived, and Referenced attributes cannot be added in a pricing rule.</li> </ul> </li> <li>▪ <b>Item ID*:</b> One of the conditions under which the pricing rule will function is that the order must contain items with the Item IDs you will specify in the Item ID fields.<br/>               To specify an Item ID, in the <b>Item ID</b> box, click the  icon to search for the corresponding Item ID.<br/>               To add an additional Item ID, click <b>Add Item</b>. To remove an item, click the  icon corresponding to the item you want to remove.<br/> <b>Note:</b> You cannot define a pricing rule by adding an Item ID multiple times.</li> </ul> |
| AND IF the quantity of the item is greater than*   | Enter the minimum quantity of the item that the order must contain for the pricing rule to function. For example, if you enter 200, one of the conditions under which the pricing rule will function is that the quantity of the items with the specified attributes or Item IDs in the order must be greater than 200.   |



| Field  | Description  |
|--|--|
| THEN apply   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>an absolute discount:</b> Select this option to apply an absolute discount on the item if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li>▪ <b>a percentage discount:</b> Select this option to apply a percentage discount on the item if the specified conditions are met.</li> <li>▪ <b>an absolute surcharge:</b> Select this option to apply an absolute surcharge on the item if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li>▪ <b>a percentage surcharge:</b> Select this option to apply a percentage surcharge on the item if the specified conditions are met.</li> </ul> |
| of* <discount amount or surcharge amount>  | Enter the amount to be either discounted from the price or charged as surcharge. For example, if you enter an absolute discount of \$25, the amount of \$25 will be discounted from the price if the specified conditions are met.   |
| Apply to   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>a single occurrence:</b> Select this option to apply the discount or surcharge to a single unit of the item.</li> <li>▪ <b>all occurrences:</b> Select this option to apply the discount or surcharge to all the units of the item.</li> </ul>   |
| For analytics and accounting purpose, the <discount or surcharge> shall be collected against the charge name | If at least one of the conditions applies discount to the order, then select the appropriate charge name from the <b>the discount shall be collected against the charge name</b> drop-down list. If at least one of the conditions applies surcharge to the order, then select the appropriate charge name from the <b>the surcharge shall be collected against the charge name</b> drop-down list. The charge name is used to track the amount of discount or surcharge that has been applied to the order.   |

## 11. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition to an item quantity pricing rule:

1. In the Pricing Rule Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for an item quantity pricing rule, under the **Conditions** tab of the Pricing Rule Summary screen, click the  icon corresponding to the condition you want to delete. The condition is no longer displayed.

**Note:** The  icon is displayed only if there is more than one condition defined.



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## Create a Pricing Rule Based on the Order Total

An order total pricing rule is a type of pricing rule that changes the total amount charged to the customer based on the order total. For example, an organization can create a pricing rule under which a customer can get a 25% discount if the customer buys goods worth \$5,000 or more. Thus, if the customer buys goods worth \$5,000, the order total charged to the customer will be \$3,750.

Only a pricing organization user can create a pricing rule based on the order total.

To create a pricing rule based on the order total:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Pricing Rule**. Alternatively, click the **New Pricing Rule** hyperlink in the home page.
3. The Create Pricing Rule screen is displayed. Select the **Order Total** option.
4. In the **Pricing Rule ID\*** box, enter a unique identifier for the pricing rule. The Pricing Rule ID, which is used to identify the pricing rule, must be unique for the pricing organization.  
**Note:** Pricing rules and coupons cannot share the same identifier. For example, if you enter XYZ in the **Pricing Rule ID\*** box, and if a coupon with XYZ as the Coupon ID exists, an error message is displayed.
5. Click **Submit**.
6. The Pricing Rule Summary screen is displayed. In the **Pricing Rule Information** panel, the Pricing Rule Type you selected and the Pricing Rule ID you entered are displayed. In the **Pricing Rule Description\*** box, enter a brief description of the pricing rule.
7. In the **Effective Start Date\*** field, select the start date by clicking the  icon, and select the start time from the drop-down list. The start date and start time indicate the date and time from which the pricing rule becomes effective.
8. In the **Effective End Date\*** field, select the end date by clicking the  icon, and select the end time from the drop-down list. The end date and the end time indicate the date and time until which the pricing rule is effective.
9. Select the **Apply results to the line and not to the order** check box to apply the effects of the pricing rule at the order line level and not the order level.

10. In the **Conditions** tab, enter the appropriate information.

The following table describes the fields in the **Conditions** tab of the Pricing Rule Summary screen:

| Field  | Description  |
|--|--|
| IF An order is placed in <currency name or any> currency   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>From the drop-down list, select the currency used in the order, for example, <b>USD</b>, <b>Euro</b>, and so on.</li> <li>Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.</li> </ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the pricing rule to apply only a percentage discount or a percentage surcharge, and not an absolute discount or an absolute surcharge to the price applied to the order.</p>   |
| AND IF the order total is greater than*  | <p>Enter the appropriate amount. For example, if you enter 1000, one of the conditions under which the pricing rule will function is that the order total of the order must be greater than \$1,000 if USD is the currency you specified.</p>  |
| THEN apply   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>an absolute discount:</b> Select this option to apply an absolute discount on the order total if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li><b>a percentage discount:</b> Select this option to apply a percentage discount on the order total if the specified conditions are met.</li> <li><b>an absolute surcharge:</b> Select this option to apply an absolute surcharge on the order total if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li><b>a percentage surcharge:</b> Select this option to apply a percentage surcharge on the order total if the specified conditions are met.</li> </ul> |
| of*  | <p>Enter the amount to be either discounted from the order total or charged as surcharge. For example, if you enter an absolute discount of \$100, the amount of \$100 will be discounted from the order total if the specified conditions are met.</p>  |
| For analytics and accounting purpose, the <discount or surcharge> shall be collected against the charge name | <p>If at least one of the conditions applies discount to the order, then select the appropriate charge name from the <b>the discount shall be collected against the charge name</b> drop-down list. If at least one of the conditions applies surcharge to the order, then select the appropriate charge name from the <b>the surcharge shall be collected against the charge name</b> drop-down list. The charge name is used to track the amount of discount or surcharge that has been applied to the order.</p>  |

11. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition to an order total pricing rule:

1. In the Pricing Rule Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for an order total pricing rule, under the **Conditions** tab of the Pricing Rule Summary screen, click the  icon corresponding to the condition you want to delete. The condition is no longer displayed.

**Note:** The  icon is displayed only if there is more than one condition defined.



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## Create a Pricing Rule Based on the Ship Order Total

A ship order total pricing rule is a type of pricing rule that changes the total shipping charges charged to a customer based on the order total. For example, an organization can create a pricing rule under which a customer can avail a 100% discount on shipping charges if the customer buys goods worth \$5000 or more.

Only a pricing organization user can create a pricing rule based on the ship order total .

To create a pricing rule based on the ship order total:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Pricing Rule**. Alternatively, click the **New Pricing Rule** hyperlink in the home page.
3. The Create Pricing Rule screen is displayed. Select the **Ship Order Total** option.
4. In the **Pricing Rule ID\*** box, enter a unique identifier for the pricing rule. The Pricing Rule ID, which is used to identify the pricing rule, must be unique for the pricing organization.  
**Note:** Pricing rules and coupons cannot share the same identifier. For example, if you enter XYZ in the **Pricing Rule ID\*** box, and if a coupon with XYZ as the Coupon ID exists, an error message is displayed.
5. Click **Submit**.
6. The Pricing Rule Summary screen is displayed. In the **Pricing Rule Information** panel, the Pricing Rule Type you selected and the Pricing Rule ID you entered are displayed. In the **Pricing Rule Description\*** box, enter a brief description of the pricing rule.
7. In the **Effective Start Date\*** field, select the start date by clicking the  icon, and select the start time from the drop-down list. The start date and start time indicate the date and time from which the pricing rule becomes effective.
8. In the **Effective End Date\*** field, select the end date by clicking the  icon, and select the end time from the drop-down list. The end date and the end time indicate the date and time until which the pricing rule is effective.
9. Select the **Apply results to the line and not to the order** check box to apply the effects of the pricing rule at the order line level and not the order level.

10. In the **Conditions** tab, enter the appropriate information.

The following table describes the fields in the **Conditions** tab of the Pricing Rule Summary screen:

| Field  | Description  |
|--|--|
| IF An order is placed in <currency name or any> currency   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>From the drop-down list, select the currency used in the order. For example, if you select <b>USD</b>, one of the conditions under which the pricing rule will function is that the currency used for the price of the items in the order must be USD.</li> <li>Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.</li> </ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the pricing rule to apply only a percentage discount or a percentage surcharge, and not an absolute discount or an absolute surcharge on the price applied to the order.</p>   |
| AND IF the order <ships completely or ships separately>  | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>ships completely:</b> Select this option to apply the pricing rule on orders that are shipped as one shipment.</li> <li><b>ships separately:</b> Select this option to apply the pricing rule on orders that may be shipped as separate shipments.</li> </ul>  |
| via <carrier service name>   | <p>From the drop-down list, select the carrier service used to ship the order. For example, if you select Express Overnight as the carrier, one of the conditions under which the pricing rule will function is that the carrier used to ship the order must be Express Overnight.</p>   |
| AND IF the order total is greater than*  | <p>Enter the appropriate amount. For example, if you enter 1000, one of the conditions under which the pricing rule will function is that the order total of the order must be greater than \$1,000 if USD is the currency you specified.</p>  |
| THEN apply   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>an absolute discount:</b> Select this option to apply an absolute discount on the shipping charges if the specified conditions are met.</li> <li><b>a percentage discount:</b> Select this option to apply a percentage discount on the shipping charges if the specified conditions are met.</li> <li><b>an absolute surcharge:</b> Select this option to apply an absolute surcharge on the shipping charges if the specified conditions are met.</li> <li><b>a percentage surcharge:</b> Select this option to apply a percentage surcharge on the shipping charges if the specified conditions are met.</li> <li><b>a maximum shipping charge:</b> Select this option to apply the maximum shipping charge if the specified conditions are met. The maximum shipping charge is a flat fee which, when applied, will replace the current shipping charges for the order.</li> </ul> |
| of*  | <p>Enter the amount to be either discounted from the shipping charges or charged as surcharge. For example, if you enter an absolute discount of \$100, the amount of \$100 will be discounted from the shipping charges if the specified conditions are met.</p>  |
| For analytics and accounting purpose, the <discount or surcharge> shall be collected against the charge name | <p>If at least one of the conditions applies discount to the order, then select the appropriate charge name from the <b>the discount shall be collected against the charge name</b> drop-down list. If at least one of the conditions applies surcharge to the order, then select the appropriate charge name from the <b>the surcharge shall be collected against the charge name</b> drop-down list. The charge name is used to track the amount of discount or surcharge that has been applied to the order.</p>  |

11. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition for a ship order total pricing rule:

1. In the Pricing Rule Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for a ship order total pricing rule, under the **Conditions** tab of the Pricing Rule Summary screen, click the  icon corresponding to the condition you want to delete. The condition is no longer displayed.

**Note:** The  icon is displayed only if there is more than one condition defined.



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## Create a Pricing Rule Based on Shipping Surcharge



A shipping surcharge pricing rule is a type of pricing rule that is used to associate an additional charge for shipping with items that have a specified set of features. For example, an organization can charge an additional amount of \$20 as surcharge to ship items that require refrigeration.

Only a pricing organization user can create a pricing rule based on shipping surcharge.

To create a pricing rule based on shipping surcharge:



1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Pricing Rule**. Alternatively, click the **New Pricing Rule** hyperlink in the home page.
3. The Create Pricing Rule screen is displayed. Select the **Shipping Surcharge** option.
4. In the **Pricing Rule ID\*** box, enter a unique identifier for the pricing rule. The Pricing Rule ID, which is used to identify the pricing rule, must be unique for the pricing organization.

**Note:** Pricing rules and coupons cannot share the same identifier. For example, if you enter XYZ in the **Pricing Rule ID\*** box, and if a coupon with XYZ as the Coupon ID exists, an error message is displayed.

5. Click **Submit**.
6. The Pricing Rule Summary screen is displayed. In the **Pricing Rule Information** panel, the Pricing Rule Type you selected and the Pricing Rule ID you entered are displayed. In the **Pricing Rule Description\*** box, enter a brief description of the pricing rule.
7. In the **Effective Start Date\*** field, select the start date by clicking the  icon, and select the start time from the drop-down list. The start date and start time indicate the date and time from which the pricing rule becomes effective.
8. In the **Effective End Date\*** field, select the end date by clicking the  icon, and select the end time from the drop-down list. The end date and the end time indicate the date and time until which the pricing rule is effective.
9. Select the **Apply even if the item price has been manually overridden** check box to apply the pricing rule even after the item's price has been manually overridden.

10. In the **Conditions** tab, enter the appropriate information.

The following table describes the fields in the **Conditions** tab of the Pricing Rule Summary screen:

| Field  | Description  |
|--|--|
| IF An order is placed in <currency name or any> currency                                       | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>From the drop-down list, select the currency used in the order, for example, <b>USD</b>, <b>Euro</b>, and so on.</li> <li>Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.</li> </ul>   |
| AND IF the order contains items where the item's attribute is in the following list:           | <p>Click the  icon adjacent the <b>Attribute ID*</b> box to search for the corresponding identifier of the attribute of an item in the order. One of the conditions under which the pricing rule will function is that the order must contain items with the attributes you specify.</p> <p>To add a new attribute, click <b>Add Attribute</b>. To remove an attribute, click the  icon corresponding to the attribute you want to remove.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>You cannot define a pricing rule by adding an attribute multiple times.</li> <li>Computed, Derived, and Referenced attributes cannot be added in a pricing rule.</li> </ul> |
| THEN apply a surcharge of*   | Enter the amount to be charged as shipping surcharge on the order if the specified conditions are met. For example, if you enter \$25, the amount of \$25 will be charged as shipping surcharge on the order if the specified conditions are met.  |
| For analytics and accounting purpose, the surcharge shall be collected against the charge name | From the drop-down list, select the charge name that is to be associated with the surcharge. The charge name is used to track the amount of surcharge that has been applied to an order.   |

11. Click **Submit**.

**Note:** \* indicates that the field is mandatory.

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## Assign a Pricing Rule to Customers

After a pricing rule is created, an enterprise user can assign the pricing rule to customers of the corresponding enterprise. When a pricing rule is assigned to a customer, the pricing rule will be used to adjust the prices applied to orders pertaining to that customer.

**Note:** Only an enterprise user can assign a pricing rule to customers.

To assign a pricing rule to specific customers:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.
3. The Basic Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the pricing rule.

**Note:** If there is only one pricing rule matching the search criteria, the details of the corresponding pricing rule are automatically displayed.


5. The Pricing Rule Summary screen is displayed. Under the **Assign To Customers** tab, the following tabs are displayed:
  - Generic Assignments
  - Customer Profile Assignments
  - Specific Assignments
6. In the **Generic Assignments** tab, specify the generic assignments for the pricing rule by selecting one or more of the following options:
  - **This pricing rule is not assigned to any customer:** Select this option to assign the pricing rule to customers at a later point of time. If you select this option, the pricing rule cannot be used to adjust the order price.
  - **This pricing rule is applicable to all customers:** Select this option to assign the pricing rule to all customers.

- **This pricing rule is applicable to the following customers:** Select this option to assign the pricing rule to different types of customers such as anonymous users, all consumer customers, and all business customers. Select the appropriate check box.

The following table describes the check boxes under the **This pricing rule is applicable to the following customers** option:

| Check Box              | Description  |
|------------------------|--|
| Anonymous users        | Select this check box to assign the pricing rule to all anonymous users. An anonymous user is a user who can add items to the cart without logging in to the Sterling Web application. If you select this check box, the pricing rule will be used to adjust the prices applied to orders pertaining to all the anonymous users. |
| All consumer customers | Select this check box to assign the pricing rule to all the consumer customers of the corresponding enterprise. If you select this check box, the pricing rule will be used to adjust the prices applied to orders pertaining to all the consumer customers.   |
| All business customers | Select this check box to assign the pricing rule to all the business customers of the corresponding enterprise. If you select this check box, the pricing rule will be used to adjust the prices applied to orders pertaining to all the business customers.   |

**Note:** If you select both the **All consumer customers** check box and the **All business customers** check box, the **Customer Profile Assignments** tab and the **Specific Assignments** tab are disabled. This is because the pricing rule will be applicable to all consumer and business customers and you do not need to specify any customer attribute criteria using the **Customer Profile Assignments** tab or add specific business customers using the **Specific Assignments** tab. Similarly, if you select the **All business customers** check box without selecting the **All consumer customers** check box, only the **Specific Assignments** tab is disabled.

7. Under the **Customer Profile Assignments** tab, specify the criteria based on customer attributes such as **Vertical**, **Relationship Type**, **Membership Level**, and **Region**. The pricing rule will be applicable to any customer who fulfills any of the criteria defined under this tab. For example, you can create a pricing rule that will be applicable only to customers from the Education vertical market and who are resellers. Click **Add** to add a customer attribute criteria. The Customer Rule dialog box is displayed. Add one or multiple criteria, as required, and click **Save**:
  - From the **Vertical** drop-down list, select the customer's vertical market, for example, **Education**, **Government**, and so on.
  - From the **Relationship Type** drop-down list, select the relationship type of the customer, for example, **Reseller**, **Retailer**, **Distributor**, and so on. The relationship type indicates the type of relationship the customer has with the enterprise.
  - From the **Membership Level** drop-down list, select the customer's membership level, for example, **Gold**, **Silver**, **Platinum**, and so on.
  - Click the  icon adjacent the **Region** box. The Regions dialog box is displayed. Select the appropriate region.

**Note:** It is mandatory that you select at least one criteria.

8. Under the **Specific Assignments** tab, add the ID and name of the business customers to whom you want to assign the pricing rule. The pricing rule will be applicable to all the customers defined under this tab. To add a customer, perform the following tasks:
  - a. Click **Add**.
  - b. The Customer Search dialog box is displayed. Enter the appropriate search criteria and click **Search**.
  - c. The ID and name of the customers matching the search criteria are displayed in the **Customer List** panel. Select the check boxes corresponding to the customers you want to add and click **Select**.
9. Click **Save**.

**Note:** The pricing rule is assigned to customers who meet any of the criteria defined under the **Generic Assignments**, **Customer Profile Assignments**, and **Specific Assignments** tabs.

## Modify Customer Assignment Attributes

An enterprise user can modify the customer attributes based on which a pricing rule is assigned to specific customers. In such a scenario, the enterprise user can modify the attributes displayed under the **Customer Profile Assignments** tab of the Pricing Rule Summary screen.

To modify attributes:

1. Under the **Customer Profile Assignments** tab, select the row containing the attributes that you want to modify, and click **Modify**. Alternatively, double-click the row containing the attributes that you want to modify.
2. The Customer Rule dialog box is displayed. Modify the appropriate fields, and click **Save**.

## Remove Customer Assignment Attributes

An enterprise user can remove the customer attributes based on which a pricing rule is assigned to specific customers. In such a scenario, the enterprise user can remove the attributes displayed under the **Customer Profile Assignments** tab of the Pricing Rule Summary screen.

To remove attributes:

1. Under the **Customer Profile Assignments** tab, select the row of attributes that you want to remove, and click **Remove**.
2. A confirmation dialog box is displayed, asking whether you want to remove the assignment. Click **Yes**.  
The row of attributes is removed.

## Remove Specific Customer Assignments

If an enterprise user does not want a pricing rule to be assigned to a specific customer, the user can remove the corresponding customer from the list of customers displayed under the **Specific Assignments** tab of the Pricing Rule Summary screen.

To remove a customer assignment:

1. Under the **Specific Assignments** tab, select the customer by selecting the corresponding check box, and click **Remove**.
2. A confirmation dialog box is displayed, asking whether you want to remove the assignments. Click **Yes**.

The row containing the ID and name of the customer is removed.

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## Search for a Pricing Rule

A user can search for a pricing rule and view its details using the following options:

- **Basic pricing rule search:** This type of search enables a user to perform a quick search by specifying basic criteria such as the complete or partial identifier of the pricing rule, the identifier of the item the pricing rule applies to, or the pricing rule type.
- **Advanced pricing rule search:** This type of search enables a user to perform a search based on the criteria the user selects. The user can select the criteria and the corresponding operator, and then select or specify the corresponding values.

### Basic Pricing Rule Search

To perform a basic pricing rule search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.
3. The Basic Pricing Rule Search screen is displayed. In the **Rule ID Contains** box, enter the complete or partial identifier of the pricing rule you want to search for.
4. Click the  icon adjacent the **Target Item Is** box to search for the item to which the rule applies. The Item Search screen is displayed. In the **Basic Item Search** panel, enter the search criteria and click **Search**. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search**. The items matching the search criteria are displayed. Select the item by clicking the corresponding **Item ID** hyperlink. Alternatively, select the corresponding check box and click **Select**.
5. From the **Rule Type Is** drop-down list, select the pricing rule type.
6. Select the **Only include pricing rules that are effective today** check box to search only for pricing rules that are valid for the current date.
7. Click **Search**. The pricing rules matching the search criteria are displayed. However, if there is only one pricing rule matching the search criteria, the Pricing Rule Summary screen is displayed.

**Note:** If the administration organization is not a pricing organization, the pricing rules that are available for the pricing organization of the administration organization are displayed.

### Advanced Pricing Rule Search

To perform an advanced pricing rule search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.
3. The Pricing Rule Search screen is displayed. Click **Advanced Search**.

4. The Advanced Pricing Rule Search panel is displayed. From the **Select Criteria** drop-down list, select the criteria that you want to include in the search. For example, to search for a pricing rule by type, select **Pricing Rule Type** from the **Select Criteria** drop-down list.
5. From the **Operator** drop-down list, select the operator you want to use for the search criteria.

In the corresponding box, enter or select the appropriate value for the criteria. The boxes are displayed based on the operator you select. For example, if you select **Effective Start Date** from the **Select Criteria** drop-down list, and **Between** from the **Operator** drop-down list, two boxes in which you can enter or select the appropriate dates, are displayed.

**Note:** It is mandatory that you select or enter at least one search criteria and a corresponding value. If you select or enter more than one search criteria, the search will return the pricing rules that match all the criteria.

6. Click **Search**. The pricing rules matching the search criteria are displayed. However, if there is only one pricing rule matching the search criteria, the Pricing Rule Summary screen is displayed.

**Note:** If the administration organization is not a pricing organization, the pricing rules that are available for the pricing organization of the administration organization are displayed.

## Add More Search Criteria

You can include additional search criteria to perform a more detailed search and narrow down the search results.

To include additional search criteria:

1. In the Advanced Pricing Rule Search screen, click **Add More Criteria**.
2. A new row for specifying the search criteria is displayed. Enter the appropriate search criteria, and click **Search**.

The pricing rules matching the search criteria are displayed. However, if there is only one pricing rule matching the search criteria, the Pricing Rule Summary screen is displayed.

**Note:** If the administration organization is not a pricing organization, the pricing rules that are available for the pricing organization of the administration organization are displayed.

## Save a Pricing Rule Search

You can save a pricing rule search to avoid entering the search criteria every time you search for a particular pricing rule.

To save a pricing rule search:

1. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.
2. The Pricing Rule Search screen is displayed. In the **Basic Pricing Rule Search** panel, enter the appropriate search criteria. Alternatively, click **Advanced Search** and enter the appropriate search criteria.
3. From the **Saved Searches** drop-down menu, select **Create Saved Search**.



4. The **Save Search** dialog box is displayed. In the **Saved Search Name\*** box, enter a name for the search that is to be saved.
5. Select the **Include in favorite searches** check box to mark the saved search as a favorite. Marking a saved search as a favorite enables you to quickly navigate to that saved search from the home page. A maximum of five most recent favorite saved searches are displayed as hyperlinks under the **Favorite Searches** panel in the home page. You can also access the favorite saved searches using the **Favorites** menu in the header bar of the home page.
6. Click **Save**.

**Note:** \* indicates that the field is mandatory.

## Perform a Search Using a Saved Pricing Rule Search

To search for a pricing rule using a saved pricing rule search:

1. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.
2. The Basic Pricing Rule Search screen is displayed. Click **Saved Searches** to view the list of saved pricing rule searches. Alternatively, click **Advanced Search** and then click **Saved Searches**.

The saved pricing rule searches are displayed in a menu, with the favorite saved searches, if any, displayed at the top of the list.

**Note:** A maximum of eight saved searches are displayed in the menu.

3. Perform either of the following tasks:
  - If the saved search is displayed in the menu, click the saved search to view the corresponding search results.
  - If the saved search is not displayed in the menu, click **More Searches...** The Find Saved Searches for Pricing Rules dialog box is displayed. In the **Saved Search Name Contains** box, enter either the complete or partial saved search name to filter the list of saved searches displayed in the **Saved Searches** panel. Double-click a saved search name to view the corresponding search results. Alternatively, click a saved search name and click **Select** to view the corresponding search results.

**Note:** The **More Searches...** button is displayed only if there are more than eight saved pricing rule searches.

The Pricing Rule Search screen is displayed with the search criteria filled in along with the search results.

## Modify a Saved Pricing Rule Search

To modify a saved pricing rule search:

1. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.

2. The Pricing Rule Search screen is displayed. Click **Saved Searches** to view the list of saved pricing rule searches. Alternatively, click **Advanced Search** and then click **Saved Searches**.

The saved pricing rule searches are displayed in a menu, with the favorite saved searches, if any, displayed at the top of the list.

**Note:** A maximum of eight saved searches are displayed in the menu.

3. Perform either of the following tasks:
  - If the saved search is displayed in the menu, click the saved search to view the corresponding search screen.
  - If the saved search is not displayed in the menu, click **More Searches...** The Find Saved Searches for Pricing Rules dialog box is displayed. In the **Saved Search Name Contains** box, enter either the complete or partial saved search name to filter the list of saved searches displayed in the **Saved Searches** panel. Double-click a saved search name to view the corresponding search screen. Alternatively, click a saved search name and click **Select** to view the corresponding search screen.  
**Note:** The **More Searches...** button is displayed only if there are more than eight saved pricing rule searches.
4. The Pricing Rule Search screen is displayed with the search criteria filled in. Modify the appropriate information, and select **Create Saved Search** from the **Saved Searches** drop-down menu.
5. The Save Search dialog box is displayed, with the name of the original saved search populated in the **Saved Search Name\*** box. Perform one of the following tasks:
  - To overwrite the original saved search, leave the name as is. The Confirm Overwrite dialog box, which contains a message asking you for confirmation about proceeding with the update of the original saved search, is displayed. Click **Yes**.
  - To save the search under a new name, enter a name for the search.
6. Select the **Include in favorite searches** check box to include the saved search in the list of favorites. If you select this check box, the saved search name will be displayed as a hyperlink in the home page and you can quickly navigate to the saved search by clicking the hyperlink.
7. Click **Save**.

**Note:** \* indicates that the field is mandatory.

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## Copy a Pricing Rule

A pricing organization user can create a new pricing rule from an existing pricing rule by copying it. When a user copies a pricing rule, all the conditions and effects defined in the original pricing rule are copied to the new pricing rule.

**Note:** The status of the new pricing rule created using the copying function will be set to **INACTIVE** even if the status of the pricing rule from which it is copied is **ACTIVE**.

To copy a pricing rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.
3. The Basic Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. If there is only one pricing rule matching the search criteria, the Pricing Rule Summary screen is displayed. Click the **Copy Price List** related task. If there are multiple pricing rules matching the search criteria, the list of pricing rules is displayed. Perform either of the following tasks:
  - Select the pricing rule you want to copy by selecting the corresponding check box, and click **Copy**.
5. The Copy Pricing Rule dialog box is displayed. In the **New Rule ID\*** box, enter a unique identifier for the new pricing rule.
6. Click **Create**.

The Pricing Rule Summary screen pertaining to the new pricing rule is displayed.

**Note:** \* indicates that the field is mandatory.

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## Modify Pricing Rule Details

An enterprise user or a pricing organization user can modify the details pertaining to a pricing rule. A pricing organization user can modify the description of a pricing rule, the date range within which a pricing rule is effective, the status of a pricing rule, the conditions under which the pricing rule will become applicable, and the effects of the pricing rule if those conditions are met. An enterprise user can modify only the assignment of a pricing rule to customers. If the pricing organization is an enterprise, the user can modify all the information pertaining to a pricing rule, including the assignment of the pricing rule to customers, and modifying the conditions and effects.



To modify the details of a pricing rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.
3. The Basic Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the pricing rule.

**Note:** If there is only one pricing rule matching the search criteria, the details of the corresponding pricing rule are automatically displayed.

5. The Pricing Rule Summary screen is displayed. Modify the appropriate fields depending on whether you are an enterprise user or a pricing organization user.

As a pricing organization user, you can modify the following fields:

- **Pricing Rule Description\***: Modify the description of the pricing rule, as appropriate.
- **Effective Start Date\***: Modify the start date and start time of the pricing rule by clicking the corresponding  icon and selecting the time from the drop-down list. The start date and start time indicate the date and time from which the pricing rule becomes effective.
- **Effective End Date\***: Modify the end date and end time of the pricing rule by clicking the corresponding  icon and selecting the time from the drop-down list. The end date and end time indicate the date and time until which the pricing rule is effective.
- **Apply even if the item price has been manually overridden**: Select or clear this check box depending on whether or not you want to apply the pricing rule even after the item's price has been manually overridden.

**Note:** This check box is displayed only if the pricing rule is a combination, item quantity, or shipping surcharge pricing rule.

- **Apply results to the line and not to the order:** Select or clear this check box depending on whether or not you want to apply the pricing rule at the order line level and not the order level.

**Note:** This check box is displayed only if the pricing rule is an order total or ship order total pricing rule.

**Note:** \* indicates that the field is mandatory.

As a pricing organization user, you can perform the following tasks:

- [Modify the Status of a Pricing Rule](#)
- [Delete a Pricing Rule](#)
- [Modify the Conditions and Effects of a Pricing Rule Based on the Combination of Items Ordered](#)
- [Modify the Conditions and Effects of a Pricing Rule Based on Item Quantity](#)
- [Modify the Conditions and Effects of a Pricing Rule Based on the Order Total](#)
- [Modify the Conditions and Effects of a Pricing Rule Based on the Ship Order Total](#)
- [Modify the Conditions and Effects of a Pricing Rule Based on Shipping Surcharge](#)
- [Copy a Pricing Rule](#)

As an enterprise user, you can perform the following task:

- [Assign a Pricing Rule to Customers](#)

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## Modify the Conditions and Effects of a Pricing Rule Based on the Combination of Items Ordered

A pricing organization user can modify the conditions under which a combination pricing rule will become applicable and the effects of the pricing rule on the price applied to an order when those conditions are met.

To modify the conditions and effects of a pricing rule based on the combination of items ordered:


1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.
3. The Basic Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the pricing rule.

**Note:** If there is only one pricing rule matching the search criteria, the details of the corresponding pricing rule are automatically displayed.



5. The Pricing Rule Summary screen is displayed. Modify the information in the **Conditions** tab, as required.

The following table describes the fields in the **Conditions** tab of the Pricing Rule Summary screen:

---

| Field  | Description   |
|--|---|
| IF An order is placed in <currency name or any> currency   | Select one of the following options: <ul style="list-style-type: none"><li>▪ From the drop-down list, select the currency used in the order, for example, <b>USD</b>, <b>Euro</b>, and so on.</li><li>▪ Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.<br/><b>Note:</b> If you select the <b>any</b> option, you can use the pricing rule to apply only a percentage discount or a percentage surcharge, and not an absolute discount or an absolute surcharge on the price applied to the order.</li></ul> |
| AND the order contains <any or all> of the following items | Select one of the following options: <ul style="list-style-type: none"><li>▪ <b>any:</b> One of the conditions under which the pricing rule will function is that the order must contain at least one of the items you will specify in the Item ID fields.</li><li>▪ <b>all:</b> One of the conditions under which the pricing rule will function is that the order must contain all the items you will specify in the Item ID fields.</li></ul>  |
| Item ID*   | Click the  icon to search for the item that the order must contain for the pricing rule to function. The Basic Item Search screen is displayed. Enter the search criteria and click <b>Search</b> . Alternatively, click <b>Advanced Search</b> , enter the search criteria, and click <b>Search</b> . The items matching the search criteria are displayed. Select the item by clicking the corresponding <b>Item ID</b> hyperlink. Alternatively, select the corresponding check box and click <b>Select</b> .   |

---

| Field                                     | Description   |
|---|---|
| with a quantity of*                       | Enter the minimum quantity of the item that the order must contain for the pricing rule to function.  |
| Add Item                                  | <p>Click this to specify an additional item. A new row for specifying the item and the minimum quantity of the item is displayed. Enter the identifier of the item and the minimum quantity of the item.</p> <p>To delete an item, click the  icon corresponding to the item you want to delete.</p> <p><b>Note:</b> You cannot define a pricing rule by adding an Item ID multiple times.</p>   |
| THEN Apply                                | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>an absolute discount:</b> Select this option to apply an absolute discount on the item if the specified conditions are met. <p><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</p> </li> <li>▪ <b>a percentage discount:</b> Select this option to apply a percentage discount on the item if the specified conditions are met.</li> <li>▪ <b>an absolute surcharge:</b> Select this option to apply an absolute surcharge on the item if the specified conditions are met. <p><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</p> </li> <li>▪ <b>a percentage surcharge:</b> Select this option to apply a percentage surcharge on the item if the specified conditions are met.</li> </ul>  |
| of* <discount amount or surcharge amount> | Enter the amount to be either discounted from the price or charged as surcharge. For example, if you enter an absolute discount of \$25, the amount of \$25 will be discounted from the price if the specified conditions are met.  |
| to the item*                              | Click the  icon to search for the item to which the discount or surcharge is to be applied. The Basic Item Search screen is displayed. Enter the search criteria and click <b>Search</b> . Alternatively, click <b>Advanced Search</b> , enter the search criteria, and click <b>Search</b> . The items matching the search criteria are displayed. Select the item by clicking the corresponding <b>Item ID</b> hyperlink. Alternatively, select the corresponding check box and click <b>Select</b> .  |
| each                                      | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>for one quantity on the order:</b> Select this option to apply the discount or surcharge on a single unit of the items you specified in the Item ID fields earlier.</li> <li>▪ <b>for every occurrence of the item on the order:</b> Select this option to apply the discount or surcharge on all the units of the items specified in the Item ID fields earlier.</li> <li>▪ <b>once for each combination of items above:</b> Select this option to apply the discount or surcharge on each combination of the items specified earlier. For example, if you specify that a customer will get a 10% discount on 1 bag of popcorn if the customer orders two movies, the customer will get only a 10% discount on one bag of popcorn even if the customer orders two movies and purchases three bags of popcorn. However, if the customer orders four movies, the customer will get a 10% discount on two bags of popcorn.</li> </ul> |

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| Field  | Description  |
|--|--|
| For analytics and accounting purpose, the <discount or surcharge> shall be collected against the charge name | From the drop-down list, select the charge name that is to be associated with the discount or surcharge. The charge name is used to track the amount of discount or surcharge that has been applied to an order. |

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6. Click **Submit**.

**Note:** \* indicates that the field is mandatory.



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## Modify the Conditions and Effects of a Pricing Rule Based on Item Quantity

A pricing organization user can modify the conditions under which an item quantity pricing rule will become applicable and the effects of the pricing rule on the price applied to an order when the conditions are met.

To modify the conditions and effects of a pricing rule based on item quantity:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.
3. The Basic Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the pricing rule.

**Note:** If there is only one pricing rule matching the search criteria, the details of the corresponding pricing rule are automatically displayed.





5. The Pricing Rule Summary screen is displayed. Modify the information in the **Conditions** tab, as required.

The following table describes the fields in the **Conditions** tab of the Pricing Rule Summary screen:

---

| Field  | Description   |
|--|---|
| IF An order is placed in <currency name or any> currency | <p>Select one of the following options:</p> <ul style="list-style-type: none"><li>▪ From the drop-down list, select the currency used in the order, for example, <b>USD</b>, <b>Euro</b>, and so on.</li><li>▪ Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.</li></ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the pricing rule to apply only a percentage discount or a percentage surcharge, and not an absolute discount or an absolute surcharge on the price applied to the order.</p> |

---

| Field  | Description  |
|--|--|
| AND IF the order contains items where the item's <attribute or Item ID> is in the following list | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>attribute:</b> One of the conditions under which the pricing rule will function is that the order must contain items with the attributes you will specify in the Attribute ID fields.</li> </ul> <p>To specify an attribute, in the <b>Attribute ID</b> box, click the  icon to search for the corresponding Attribute ID.</p> <p>To add a new attribute, click <b>Add Attribute</b>. To remove an attribute, click the  icon corresponding to the attribute you want to remove.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>- You cannot define a pricing rule by adding an attribute multiple times.</li> <li>- Computed, Derived, and Referenced attributes cannot be added in a pricing rule.</li> </ul> <ul style="list-style-type: none"> <li>▪ <b>Item ID*:</b> One of the conditions under which the pricing rule will function is that the order must contain items with the Item IDs you will specify in the Item ID fields.</li> </ul> <p>To specify an Item ID, in the <b>Item ID</b> box, click the  icon to search for the corresponding Item ID.</p> <p>To add an additional Item ID, click <b>Add Item</b>. To remove an item, click the  icon corresponding to the item you want to remove.</p> <p><b>Note:</b> You cannot define a pricing rule by adding an Item ID multiple times.</p> |
| AND IF the quantity of the item is greater than*   | <p>Enter the minimum quantity of the item that the order must contain for the pricing rule to function. For example, if you enter 200, one of the conditions under which the pricing rule will function is that the quantity of the items with the specified attributes or Item IDs in the order must be greater than 200.</p>   |
| THEN apply   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>an absolute discount:</b> Select this option to apply an absolute discount on the item if the specified conditions are met.</li> </ul> <p><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</p> <ul style="list-style-type: none"> <li>▪ <b>a percentage discount:</b> Select this option to apply a percentage discount on the item if the specified conditions are met.</li> <li>▪ <b>an absolute surcharge:</b> Select this option to apply an absolute surcharge on the item if the specified conditions are met.</li> </ul> <p><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</p> <ul style="list-style-type: none"> <li>▪ <b>a percentage surcharge:</b> Select this option to apply a percentage surcharge on the item if the specified conditions are met.</li> </ul>   |
| of* <discount amount or surcharge amount>  | <p>Enter the amount to be either discounted from the price or charged as surcharge. For example, if you enter an absolute discount of \$25, the amount of \$25 will be discounted from the price if the specified conditions are met.</p>  |
| Apply to   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>a single occurrence:</b> Select this option to apply the discount or surcharge to a single unit of the item.</li> <li>▪ <b>all occurrences:</b> Select this option to apply the discount or surcharge to all the units of the item.</li> </ul>   |

| Field  | Description  |
|--|--|
| For analytics and accounting purpose, the <discount or surcharge> shall be collected against the charge name | If at least one of the conditions applies discount to the order, then select the appropriate charge name from the <b>the discount shall be collected against the charge name</b> drop-down list. If at least one of the conditions applies surcharge to the order, then select the appropriate charge name from the <b>the surcharge shall be collected against the charge name</b> drop-down list. The charge name is used to track the amount of discount or surcharge that has been applied to the order. |

6. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition to an item quantity pricing rule:

1. In the Pricing Rule Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for an item quantity pricing rule, under the **Conditions** tab of the Pricing Rule Summary screen, click the  icon corresponding to the condition you want to delete. The condition is no longer displayed.

**Note:** The  icon is displayed only if there is more than one condition defined.

---

## Modify the Conditions and Effects of a Pricing Rule Based on the Order Total

A pricing organization user can modify the conditions under which an order total pricing rule will become applicable and the effects of the pricing rule on the price applied to an order when the conditions are met.

To modify the conditions and effects of a pricing rule based on the order total:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.
3. The Basic Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the pricing rule.

**Note:** If there is only one pricing rule matching the search criteria, the details of the corresponding pricing rule are automatically displayed.

5. The Pricing Rule Summary screen is displayed. Modify the information in the **Conditions** tab, as required.

The following table describes the fields in the **Conditions** tab of the Pricing Rule Summary screen:

---

| Field  | Description   |
|--|---|
| IF An order is placed in <currency name or any> currency | Select one of the following options: <ul style="list-style-type: none"><li>▪ From the drop-down list, select the currency used in the order, for example, <b>USD</b>, <b>Euro</b>, and so on.</li><li>▪ Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.<br/><b>Note:</b> If you select the <b>any</b> option, you can use the pricing rule to apply only a percentage discount or a percentage surcharge, and not an absolute discount or an absolute surcharge to the price applied to the order.</li></ul> |
| AND IF the order total is greater than*                  | Enter the appropriate amount. For example, if you enter 1000, one of the conditions under which the pricing rule will function is that the order total of the order must be greater than \$1,000 if USD is the currency you specified.  |

---

| Field  | Description  |
|--|--|
| THEN apply   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>an absolute discount:</b> Select this option to apply an absolute discount on the order total if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li>▪ <b>a percentage discount:</b> Select this option to apply a percentage discount on the order total if the specified conditions are met.</li> <li>▪ <b>an absolute surcharge:</b> Select this option to apply an absolute surcharge on the order total if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li>▪ <b>a percentage surcharge:</b> Select this option to apply a percentage surcharge on the order total if the specified conditions are met.</li> </ul> |
| of*  | <p>Enter the amount to be either discounted from the order total or charged as surcharge. For example, if you enter an absolute discount of \$100, the amount of \$100 will be discounted from the order total if the specified conditions are met.</p>  |
| For analytics and accounting purpose, the <discount or surcharge> shall be collected against the charge name | <p>If at least one of the conditions applies discount to the order, then select the appropriate charge name from the <b>the discount shall be collected against the charge name</b> drop-down list. If at least one of the conditions applies surcharge to the order, then select the appropriate charge name from the <b>the surcharge shall be collected against the charge name</b> drop-down list. The charge name is used to track the amount of discount or surcharge that has been applied to the order.</p>  |

6. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition to an order total pricing rule:

1. In the Pricing Rule Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for an order total pricing rule, under the **Conditions** tab of the Pricing Rule Summary screen, click the  icon corresponding to the condition you want to delete. The condition is no longer displayed.

**Note:** The  icon is displayed only if there is more than one condition defined.

---

## Modify the Conditions and Effects of a Pricing Rule Based on the Ship Order Total

A pricing organization user can modify the conditions under which a ship order total pricing rule will become applicable and the effects of the pricing rule on the price applied to an order when the conditions are met.

To modify the conditions and effects of a pricing rule based on the ship order total:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.
3. The Basic Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the pricing rule.

**Note:** If there is only one pricing rule matching the search criteria, the details of the corresponding pricing rule are automatically displayed.

5. The Pricing Rule Summary screen is displayed. Modify the information in the **Conditions** tab, as required.

The following table describes the fields in the **Conditions** tab of the Pricing Rule Summary screen:

---

| Field  | Description   |
|--|---|
| IF An order is placed in <currency name or any> currency | Select one of the following options: <ul style="list-style-type: none"><li>▪ From the drop-down list, select the currency used in the order. For example, if you select <b>USD</b>, one of the conditions under which the pricing rule will function is that the currency used for the price of the items in the order must be USD.</li><li>▪ Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.<br/><b>Note:</b> If you select the <b>any</b> option, you can use the pricing rule to apply only a percentage discount or a percentage surcharge, and not an absolute discount or an absolute surcharge on the price applied to the order.</li></ul> |
| AND IF the order <ships completely or ships separately>  | Select one of the following options: <ul style="list-style-type: none"><li>▪ <b>ships completely:</b> Select this option to apply the pricing rule on orders that are shipped as one shipment.</li><li>▪ <b>ships separately:</b> Select this option to apply the pricing rule on orders that may be shipped as separate shipments.</li></ul>   |
| via <carrier service name>                               | From the drop-down list, select the carrier service used to ship the order. For example, if you select Express Overnight as the carrier, one of the conditions under which the pricing rule will function is that the carrier used to ship the order must be Express Overnight.   |

---

| Field  | Description   |
|--|---|
| AND IF the order total is greater than*  | Enter the appropriate amount. For example, if you enter 1000, one of the conditions under which the pricing rule will function is that the order total of the order must be greater than \$1,000 if USD is the currency you specified.  |
| THEN apply   | Select one of the following options: <ul style="list-style-type: none"> <li>▪ <b>an absolute discount:</b> Select this option to apply an absolute discount on the shipping charges if the specified conditions are met.</li> <li>▪ <b>a percentage discount:</b> Select this option to apply a percentage discount on the shipping charges if the specified conditions are met.</li> <li>▪ <b>an absolute surcharge:</b> Select this option to apply an absolute surcharge on the shipping charges if the specified conditions are met.</li> <li>▪ <b>a percentage surcharge:</b> Select this option to apply a percentage surcharge on the shipping charges if the specified conditions are met.</li> <li>▪ <b>a maximum shipping charge:</b> Select this option to apply the maximum shipping charge if the specified conditions are met. The maximum shipping charge is a flat fee which, when applied, will replace the current shipping charges for the order.</li> </ul> |
| of*  | Enter the amount to be either discounted from the shipping charges or charged as surcharge. For example, if you enter an absolute discount of \$100, the amount of \$100 will be discounted from the shipping charges if the specified conditions are met.  |
| For analytics and accounting purpose, the <discount or surcharge> shall be collected against the charge name | If at least one of the conditions applies discount to the order, then select the appropriate charge name from the <b>the discount shall be collected against the charge name</b> drop-down list. If at least one of the conditions applies surcharge to the order, then select the appropriate charge name from the <b>the surcharge shall be collected against the charge name</b> drop-down list. The charge name is used to track the amount of discount or surcharge that has been applied to the order.  |

## 6. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition for a ship order total pricing rule:

1. In the Pricing Rule Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for a ship order total pricing rule, under the **Conditions** tab of the Pricing Rule Summary screen, click the  icon corresponding to the condition you want to delete. The condition is no longer displayed.

**Note:** The  icon is displayed only if there is more than one condition defined.

# Modify the Conditions and Effects of a Pricing Rule Based on Shipping Surcharge

A pricing organization user can modify the conditions under which a shipping surcharge pricing rule will apply and the effects of the pricing rule on the price applied to an order when the conditions are satisfied.



To modify the conditions and effects of a pricing rule based on shipping surcharge:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.
3. The Basic Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the pricing rule.

**Note:** If there is only one pricing rule matching the search criteria, the details of the corresponding pricing rule are automatically displayed.

5. The Pricing Rule Summary screen is displayed. Modify the information in the **Conditions** tab, as required.

The following table describes the fields in the **Conditions** tab of the Pricing Rule Summary screen:

| Field  | Description  |
|--|--|
| IF An order is placed in <currency name or any> currency                             | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ From the drop-down list, select the currency used in the order, for example, <b>USD</b>, <b>Euro</b>, and so on.</li> <li>▪ Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.</li> </ul>   |
| AND IF the order contains items where the item's attribute is in the following list: | <p>Click the  icon adjacent the <b>Attribute ID*</b> box to search for the corresponding identifier of the attribute of an item in the order. One of the conditions under which the pricing rule will function is that the order must contain items with the attributes you specify.</p> <p>To add a new attribute, click <b>Add Attribute</b>. To remove an attribute, click the  icon corresponding to the attribute you want to remove.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>- You cannot define a pricing rule by adding an attribute multiple times.</li> <li>- Computed, Derived, and Referenced attributes cannot be added in a pricing rule.</li> </ul> |
| THEN apply a surcharge of*   | <p>Enter the amount to be charged as shipping surcharge on the order if the specified conditions are met. For example, if you enter \$25, the amount of \$25 will be charged as shipping surcharge on the order if the specified conditions are met.</p>   |



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| <b>Field</b>   | <b>Description</b>   |
|--|--|
| For analytics and accounting purpose, the surcharge shall be collected against the charge name | From the drop-down list, select the charge name that is to be associated with the surcharge. The charge name is used to track the amount of surcharge that has been applied to an order. |

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6. Click **Submit**.

**Note:** \* indicates that the field is mandatory.

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## Modify the Status of a Pricing Rule

A pricing rule can be in either **Active** status or **Inactive** status. A pricing rule can have an effect on the order price only if the pricing rule is in the **Active** status. A pricing organization user can assign a pricing rule that is in the **Inactive** status to a customer, but that pricing rule will have no effect on the price adjustments made to the order until it is activated.

A pricing organization user can change the status of a pricing rule to either activate or deactivate the pricing rule.

To modify the status of a pricing rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.
3. The Basic Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the pricing rule.

**Note:** If there is only one pricing rule matching the search criteria, the details of the corresponding pricing rule are automatically displayed.

5. The Pricing Rule Summary screen is displayed. Perform either of the following tasks:
  - If the status of the pricing rule is **INACTIVE**, click **Activate** to activate the pricing rule.
  - If the status of the pricing rule is **ACTIVE**, click **Deactivate** to deactivate the pricing rule.
6. Click **Save**.

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## Delete a Pricing Rule

A pricing organization user can delete a pricing rule, if required.

To delete a pricing rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Pricing Rule**. Alternatively, click the **Find Pricing Rule** hyperlink in the home page.
3. The Basic Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the pricing rule.

**Note:** If there is only one pricing rule matching the search criteria, the details of the corresponding pricing rule are automatically displayed.

5. The Pricing Rule Summary screen is displayed. Click **Delete**.

The pricing rule is deleted and the home page is displayed.

**Notes:**

- The **Delete** button is enabled only if the status of the pricing rule is **Inactive**.
- To delete a pricing rule that is assigned to a customer, you must first remove the customer assignments.

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## Create a Manual Pricing Rule

You can create manual pricing rules that can be used by a customer sales representative in a quote. A manual pricing rule will be used to perform pricing adjustments to a quote. However, a manual pricing rule will be applicable only if certain conditions are met. A manual pricing rule is characterized by conditions and effects. When a condition pertaining to a manual pricing rule is satisfied, the corresponding effect is applied to the corresponding quote's price. There are various price adjustments that a customer sales representative can apply to the price of an entire quote, a line item or an option in the quote. For example a dealer can give the factory discount, marketing discount, and special pricing discount on an item. Manual pricing rules can thus be applied to a quote as required. However, a manual pricing rule cannot be applied automatically. A customer sales representative must select the appropriate manual pricing rules to be applied to a quote using the Sterling Field Sales application.

The effect of a manual pricing rule can either be a discount or a surcharge. Discounts can be an absolute amount, a percentage amount, or a flat fee. A manual pricing rule that modifies the price applied to a quote by an absolute amount can be applied only to a single currency. A manual pricing rule that modifies the price applied to a quote by a percentage amount can be applied to either a single currency or multiple currencies.

Pricing adjustments defined for a manual pricing rule can be overridden by a customer sales representative when creating a quote. However, a pricing adjustment cannot exceed the maximum adjustment defined in a manual pricing rule.

While a pricing organization user can only create or modify a manual pricing rule, an enterprise user can assign a manual pricing rule to customers.

The following table lists the types of manual pricing rules that can be created. The corresponding topics containing detailed information pertaining to these tasks are listed adjacent to the manual pricing rule types.

Click a topic name to access details pertaining to that topic.

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| <b>Manual Pricing Rule Type</b> | <b>Topic</b>   |
|---------------------------------|--|
| Combination                     | <a href="#">Create a Manual Pricing Rule Based on the Combination of Items Ordered</a> |
| Item Quantity                   | <a href="#">Create a Manual Pricing Rule Based on Item Quantity</a>                    |
| Order Total                     | <a href="#">Create a Manual Pricing Rule Based on the Order Total</a>                  |

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## Create a Manual Pricing Rule Based on the Combination of Items Ordered



You can create a manual pricing rule for an item, based on the combination of items being ordered. In this type of manual pricing rule, the price of an item changes based on the combination of items being ordered. For example, you can create a manual pricing rule under which, for every home theatre system a customer buys, a discount is offered on a DVD player.

**Note:** Only a pricing organization user can create a manual pricing rule based on the combination of items ordered.

To create a manual pricing rule based on the combination of items ordered:



1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Manual Pricing Rule**. Alternatively, click the **New Manual Pricing Rule** hyperlink in the home page.
3. The Create Manual Pricing Rule screen is displayed. Select the **Combination** radio button.
4. In the **Manual Pricing Rule ID\*** box, enter a unique identifier for the manual pricing rule. The Manual Pricing Rule ID, which is used to identify the manual pricing rule, must be unique for each pricing organization.


**Note:** Manual pricing rules and coupons cannot share the same identifier. For example, if you enter SAVE50SHIP in the **Manual Pricing Rule ID\*** box, and if a coupon with SAVE50SHIP as the Coupon ID exists, an error message is displayed.

5. Click **Submit**.
6. The Manual Pricing Rule Summary screen is displayed. In the **Manual Pricing Rule Information** panel, the Manual Pricing Rule Type you selected and the Manual Pricing Rule ID you entered are displayed. In the **Manual Pricing Rule Description\*** box, enter a brief description of the manual pricing rule.
7. Select the start date by clicking the  icon adjacent the **Effective Start Date\*** field, and select the start time from the drop-down list. The start date and start time indicate the date and time from which the manual pricing rule becomes effective.
8. Select the end date by clicking the  icon adjacent the **Effective End Date\*** field, and select the end time from the drop-down list. The end date and the end time indicate the date and time until which the manual pricing rule is effective.

9. In the **Conditions** tab, enter the appropriate information.

The following table describes the fields in the **Conditions** tab of the Manual Pricing Rule Summary screen:

| Field  | Description  |
|--|--|
| IF An order is placed in<br><currency name or any><br>currency   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>From the drop-down list, select the currency used in the order, for example, USD.</li> <li>Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if only one currency is defined for the pricing organization.</li> </ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the manual pricing rule to apply only a percentage discount or a percentage surcharge, and not an absolute discount or an absolute surcharge on the price applied to the order.</p>   |
| AND the order contains<br><any or all> of the<br>following items | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>any:</b> One of the conditions under which this manual pricing rule will function is that the order must contain at least one of the items you specify in the Item ID fields.</li> <li><b>all:</b> One of the conditions under which this manual pricing rule will function is that the order must contain all the items you specify in the Item ID field.</li> </ul>  |
| Item ID*   | <p>Click the  icon to search for the item that the order must contain for this manual pricing rule to function. The Basic Item Search screen is displayed. Enter the search criteria and click <b>Search</b>. Alternatively, click <b>Advanced Search</b>, enter the search criteria, and click <b>Search</b>. The items matching the search criteria are displayed. Select the relevant item by clicking the corresponding <b>Item ID</b> hyperlink. Alternatively, select the corresponding check box and click <b>Select</b>.</p>  |
| with a quantity of*<br><quantity> Each                           | <p>Enter the minimum quantity of the item the order must contain for this manual pricing rule to function.</p>   |
| Add Item   | <p>Click this to specify an additional item. A new row for specifying the item and the minimum quantity of the item is displayed. Enter the identifier of the item and the minimum quantity of the item.</p> <p>To delete an item, click the  icon adjacent the item you want to delete.</p> <p><b>Note:</b> You cannot define a manual pricing rule by adding the same Item ID multiple times.</p>   |
| THEN Allow a maximum   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>absolute discount:</b> Select this option to apply an absolute discount on the item if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li><b>percentage discount:</b> Select this option to apply a percentage discount on the item if the specified conditions are met.</li> <li><b>absolute surcharge:</b> Select this option to apply an absolute surcharge on the item if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li><b>percentage surcharge:</b> Select this option to apply a percentage surcharge on the item if the specified conditions are met.</li> </ul> |

| Field  | Description   |
|--|---|
| of* <discount amount or surcharge amount>  | <p>Enter the maximum amount that cannot be exceeded when overriding the amount to be either discounted from the price or charged as surcharge in the Sterling Field Sales application.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>▪ If this field is left blank, the amount to be either discounted from the price or charged as surcharge in the Sterling Field Sales application can be overridden to any value.</li> <li>▪ The value in this field should not be less than the default pricing adjustment value.</li> </ul>   |
| with a default of <discount amount or surcharge amount>  | <p>Enter the default amount that will be either discounted from the price or charged as surcharge.</p> <p><b>Note:</b> The default amount can be overridden in the Sterling Field Sales application, but this amount cannot exceed the maximum amount configured.</p>   |
| to the item* <Item ID> for every occurrence of the item on the order   | <p>Click the  icon to search for the item to which the discount or surcharge is to be applied. The Basic Item Search screen is displayed. Enter the search criteria and click <b>Search</b>. Alternatively, click <b>Advanced Search</b>, enter the search criteria, and click <b>Search</b>. The items matching the search criteria are displayed. Select the relevant item by clicking the corresponding <b>Item ID</b> hyperlink. Alternatively, select the corresponding check box and click <b>Select</b>. The discount or surcharge will be applied on all the units of the items specified in the Item ID fields earlier.</p> |
| For analytics and accounting purpose, the <discount or surcharge> shall be collected against the charge name | <p>From the drop-down list, select the charge name that is to be associated with the discount or surcharge. The charge name is used to track the amount of discount or surcharge that has been applied to an order.</p>   |

10. Click **Submit**.

**Note:** \* indicates that the field is mandatory.

---

## Create a Manual Pricing Rule Based on Item Quantity



You can create a manual pricing rule for an item based on the quantity of that item. In this manual pricing rule type, the price of an item changes based on the quantity of items a customer places an order for. For example, you can create a manual pricing rule under which a customer can get a discount of \$50 if the customer buys three shirts, and a discount of \$150 if the customer buys six shirts.

**Note:** Only a pricing organization user can create a manual pricing rule based on the quantity of an item.

To create a manual pricing rule based on the quantity of an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Manual Pricing Rule**. Alternatively, click the **New Manual Pricing Rule** hyperlink in the home page.
3. The Create Manual Pricing Rule screen is displayed. Select the **Item Quantity** option.
4. In the **Manual Pricing Rule ID\*** box, enter a unique identifier for the manual pricing rule. The Manual Pricing Rule ID, which is used to identify the manual pricing rule, must be unique for each pricing organization.





**Note:** Manual pricing rules and coupons cannot share the same identifier. For example, if you enter SAVE50SHIP in the **Manual Pricing Rule ID\*** box, and if a coupon with SAVE50SHIP as the Coupon ID exists, an error message is displayed.

5. Click **Submit**.
6. The Manual Pricing Rule Summary screen is displayed. In the **Manual Pricing Rule Information** panel, the Manual Pricing Rule Type you selected and the Manual Pricing Rule ID you entered are displayed. In the **Manual Pricing Rule Description\*** box, enter a brief description of the manual pricing rule.
7. Select the start date by clicking the  icon adjacent the **Effective Start Date\*** field, and select the start time from the drop-down list. The start date and start time indicate the date and time from which the manual pricing rule becomes effective.
8. Select the end date by clicking the  icon adjacent the **Effective End Date\*** field, and select the end time from the drop-down list. The end date and the end time indicate the date and time until which the manual pricing rule is effective.



9. In the **Conditions** tab, enter the appropriate information.

The following table describes the fields in the **Conditions** tab of the Manual Pricing Rule Summary screen:

| Field  | Description   |
|--|---|
| IF An order is placed in <currency name or any> currency   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>From the drop-down list, select the currency used in the order, for example, USD.</li> <li>Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if only one currency is defined for the pricing organization.</li> </ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the manual pricing rule to apply only a percentage discount or a percentage surcharge, and not an absolute discount or an absolute surcharge on the price applied to the order.</p>  |
| AND IF the order contains items where the item's <attribute or Item ID> is in the following list | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>attribute:</b> One of the conditions under which this pricing rule will function is that the order must contain items with the attributes you specify in the Attribute ID fields. <ul style="list-style-type: none"> <li>To specify an attribute, click the  icon adjacent the <b>Attribute ID</b> box to search for the corresponding Attribute ID.</li> <li>To add a new attribute, click <b>Add Attribute</b>.</li> <li>To remove an attribute, click the  icon adjacent the attribute you want to remove.</li> </ul> <p><b>Note:</b> You cannot define a pricing rule by adding the same attribute multiple times.</p> </li> <li><b>Item ID*:</b> One of the conditions under which the manual pricing rule will function is that the order must contain items with the Item IDs you specify in the Item ID fields. <ul style="list-style-type: none"> <li>To specify an Item ID, click the  icon adjacent the <b>Item ID</b> box to search for the corresponding Item ID.</li> <li>To add an additional Item ID, click <b>Add Item</b>. To remove an item, click the  icon adjacent the item you want to remove.</li> </ul> <p><b>Note:</b> You cannot define a manual pricing rule by adding the same Item ID multiple times.</p> </li> </ul> |
| AND IF the quantity of the item is greater than*   | <p>Enter the minimum quantity of the item the order must contain for this manual pricing rule to function. For example, if you enter 200, one of the conditions under which this manual pricing rule will function is that the quantity of the items with the specified attributes or Item IDs in the order must be greater than 200.</p>   |

| Field   | Description  |
|---|--|
| THEN Allow a maximum of* <discount amount or surcharge amount>  | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>absolute discount:</b> Select this option to apply an absolute discount on the item if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li>▪ <b>percentage discount:</b> Select this option to apply a percentage discount on the item if the specified conditions are met.</li> <li>▪ <b>absolute surcharge:</b> Select this option to apply an absolute surcharge on the item if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li>▪ <b>percentage surcharge:</b> Select this option to apply a percentage surcharge on the item if the specified conditions are met.</li> </ul> |
| of* <discount amount or surcharge amount>   | <p>Enter the maximum amount that cannot be exceeded when overriding the amount to be either discounted from the price or charged as surcharge in the Sterling Field Sales application.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>▪ If this field is left blank, the amount to be either discounted from the price or charged as surcharge in the Sterling Field Sales application can be overridden to any value.</li> <li>▪ The value in this field should not be less than the default pricing adjustment value.</li> </ul>  |
| with a default of <discount amount or surcharge amount><br>Apply to all occurrences of the matching item on the order | <p>Enter the amount that will be either discounted from the price or charged as surcharge by default.</p> <p><b>Note:</b> The default amount can be overridden in the Sterling Field Sales application, but this amount cannot exceed the maximum amount configured.</p>   |
| For analytics and accounting purpose, the <discount or surcharge> shall be collected against the charge name          | <p>If at least one of the conditions applies a discount to the order, select the appropriate charge name from <b>the discount shall be collected against the charge name</b> drop-down list. If at least one of the conditions applies surcharge to the order, select the appropriate charge name from <b>the surcharge shall be collected against the charge name</b> drop-down list. The charge name is used to track the amount of discount or surcharge that has been applied to the order.</p>  |

10. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition to a manual pricing rule based on the quantity of an item:

1. In the Manual Pricing Rule Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for a manual pricing rule based on the quantity of an item, under the **Conditions** tab of the Manual Pricing Rule Summary screen, click the  icon adjacent the condition you want to delete. The condition will no longer be displayed.

**Note:** The  icon is displayed only if more than one condition is defined.

---

## Create a Manual Pricing Rule Based on the Order Total



You can create a manual pricing rule in which you can define the pricing of an item based on the order total. In this type of the manual pricing rule, the total amount charged to the customer changes, based on the order total. For example, you can create a manual pricing rule under which a customer can get a 25% discount if the customer buys goods worth \$5,000 or more. Thus, if the customer buys goods worth \$5,000, the order total charged to the customer will be \$3,750.

**Note:** Only a pricing organization user can create a manual pricing rule based on the order total.

To create a manual pricing rule based on the order total:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Manual Pricing Rule**. Alternatively, click the **New Manual Pricing Rule** hyperlink in the home page.
3. The Create Manual Pricing Rule screen is displayed. Select the **Order Total** option.
4. In the **Manual Pricing Rule ID\*** box, enter a unique identifier for the manual pricing rule. The Manual Pricing Rule ID, which is used to identify the manual pricing rule, must be unique for each pricing organization.

**Note:** Manual pricing rules and coupons cannot share the same identifier. For example, if you enter SAVE50SHIP in the **Manual Pricing Rule ID\*** box, and if a coupon with SAVE50SHIP as the Coupon ID exists, an error message is displayed.

5. Click **Submit**.
6. The Manual Pricing Rule Summary screen is displayed. In the **Manual Pricing Rule Information** panel, the Manual Pricing Rule Type you selected and the Manual Pricing Rule ID you entered are displayed. In the **Manual Pricing Rule Description\*** box, enter a brief description of the manual pricing rule.
7. Select the start date by clicking the  icon adjacent the **Effective Start Date\*** field, and select the start time from the drop-down list. The start date and start time indicate the date and time from which the manual pricing rule becomes effective.
8. Select the end date by clicking the  icon adjacent the **Effective End Date\*** field, and select the end time from the drop-down list. The end date and the end time indicate the date and time until which the manual pricing rule is effective.

9. In the **Conditions** tab, enter the appropriate information.

The following table describes the fields in the **Conditions** tab of the Manual Pricing Rule Summary screen:

| Field  | Description  |
|--|--|
| IF An order is placed in <currency name or any> currency   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>From the drop-down list, select the currency used in the order, for example, USD.</li> <li>Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if only one currency is defined for the pricing organization.</li> </ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use this manual pricing rule to apply only a percentage discount or a percentage surcharge, and not an absolute discount or an absolute surcharge to the price applied to the order.</p>  |
| AND IF the order total is greater than*  | <p>Enter the appropriate amount. For example, if you enter 1000, one of the conditions under which this manual pricing rule will function is that the order total of the order must be greater than \$1,000 if USD is the currency you specified.</p>  |
| THEN Allow a maximum   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>absolute discount:</b> Select this option to apply an absolute discount on the order total if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li><b>percentage discount:</b> Select this option to apply a percentage discount on the order total if the specified conditions are met.</li> <li><b>absolute surcharge:</b> Select this option to apply an absolute surcharge on the order total if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li><b>percentage surcharge:</b> Select this option to apply a percentage surcharge on the order total if the specified conditions are met.</li> </ul> |
| of* <discount amount or surcharge amount>  | <p>Enter the maximum amount that cannot be exceeded when overriding the amount to be either discounted from the price or charged as surcharge in the Sterling Field Sales application.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>If this field is left blank, the amount to be either discounted from the price or charged as surcharge in the Sterling Field Sales application can be overridden to any value.</li> <li>The value in this field should not be less than the default pricing adjustment value.</li> </ul>  |
| with a default of <discount amount or surcharge amount>  | <p>Enter the default amount that will be either discounted from the price or charged as surcharge.</p> <p><b>Note:</b> The default amount can be overridden in the Sterling Field Sales application, but this amount cannot exceed the maximum amount configured.</p>  |
| For analytics and accounting purpose, the <discount or surcharge> shall be collected against the charge name | <p>If at least one of the conditions applies discount to the order, select the appropriate charge name from <b>the discount shall be collected against the charge name</b> drop-down list. If at least one of the conditions applies surcharge to the order, then select the appropriate charge name from <b>the surcharge shall be collected against the charge name</b> drop-down list. The charge name is used to track the amount of discount or surcharge that has been applied to the order.</p>   |

10. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition to a manual pricing rule based on the order total:

1. In the Manual Pricing Rule Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for a manual pricing rule based on the order total, under the **Conditions** tab of the Manual Pricing Rule Summary screen, click the  icon adjacent the condition you want to delete. The condition will no longer be displayed.

**Note:** The  icon is displayed only if more than one condition is defined.

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## Assign a Manual Pricing Rule to Customers

After a manual pricing rule is created, an enterprise user can assign the manual pricing rule to customers of the corresponding enterprise. When a manual pricing rule is assigned to a customer, this manual pricing rule will be used to adjust the prices applied to quotes pertaining to that customer.

**Note:** Only an enterprise user can assign a manual pricing rule to customers.

To assign a manual pricing rule to specific customers:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Manual Pricing Rule**. Alternatively, click the **Find Manual Pricing Rule** hyperlink in the home page.
3. The Manual Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The manual pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the manual pricing rule.


**Note:** If only one manual pricing rule matches the search criteria, the details of the corresponding manual pricing rule are automatically displayed.

5. The Manual Pricing Rule Summary screen is displayed. Under the **Assign To Customers** tab, the following tabs are displayed:
  - Generic Assignments
  - Customer Profile Assignments
  - Specific Assignments
6. In the **Generic Assignments** tab, specify the generic assignments for the manual pricing rule by selecting one or more of the following options:
  - **This manual pricing rule is not assigned to any customer:** Select this option to assign the manual pricing rule to customers at a later point of time. If you select this option, the manual pricing rule cannot be used to adjust the quote price.
  - **This manual pricing rule is applicable to all customers:** Select this option to assign the manual pricing rule to all customers.
  - **This manual pricing rule is applicable to the following customers:** Select this option to assign the manual pricing rule to different types of customers such as anonymous users, all consumer customers, and all business customers. Select the appropriate check box.

The following table describes the check boxes under the **This manual pricing rule is applicable to the following customers** option:

| Check Box              | Description  |
|------------------------|--|
| Anonymous users        | Select this to assign the manual pricing rule to all anonymous users. An anonymous user is a user who can add items to the cart without logging in to the Sterling Web application. If you select this check box, the manual pricing rule will be used to adjust the prices applied to quotes pertaining to all the anonymous users. |
| All consumer customers | Select this to assign the manual pricing rule to all the consumer customers of the corresponding enterprise. If you select this check box, the manual pricing rule will be used to adjust the prices applied to quotes pertaining to all the consumer customers.   |
| All business customers | Select this to assign the manual pricing rule to all the business customers of the corresponding enterprise. If you select this check box, the manual pricing rule will be used to adjust the prices applied to quotes pertaining to all the business customers.   |

**Notes:**

- If you select both the **All consumer customers** check box and the **All business customers** check box, the **Customer Profile Assignments** tab and the **Specific Assignments** tab are disabled. This is because the manual pricing rule will be applicable to all consumer and business customers and you do not need to specify any customer attribute criteria using the **Customer Profile Assignments** tab or add specific business customers using the **Specific Assignments** tab.
  - Similarly, if you select the **All business customers** check box without selecting the **All consumer customers** check box, only the **Specific Assignments** tab is disabled.
7. Under the **Customer Profile Assignments** tab, specify the criteria based on customer attributes such as **Vertical**, **Relationship Type**, **Membership Level**, and **Region**. The manual pricing rule will be applicable to any customer who fulfills any of the criteria defined under this tab. For example, you can create a manual pricing rule that will be applicable only to customers from the Education vertical market and who are resellers. Click **Add** to add a customer attribute criteria. The Customer Rule dialog box is displayed. Add one or multiple criteria, as required:
- From the **Vertical** drop-down list, select the customer’s vertical market, for example, **Education**, **Government**, and so on.
  - From the **Relationship Type** drop-down list, select the relationship type of the customer, for example, **Reseller**, **Retailer**, **Distributor**, and so on. The relationship type indicates the type of relationship the customer has with the enterprise.
  - From the **Membership Level** drop-down list, select the customer’s membership level, for example, **Gold**, **Silver**, **Platinum**, and so on.
  - Click the  icon adjacent the **Region** box. The Regions dialog box is displayed. Select the appropriate region.
  - Click **Save**.

**Note:** It is mandatory that you select at least one criteria.



8. Under the **Specific Assignments** tab, add the ID and name of the business customers to whom you want to assign the manual pricing rule. The manual pricing rule will be applicable to all the customers defined under this tab. To add a customer, perform the following tasks:
  - a. Click **Add**.
  - b. The Customer Search dialog box is displayed. Enter the appropriate search criteria and click **Search**.
  - c. The ID and name of the customers matching the search criteria are displayed in the **Customer List** panel. Select the check boxes corresponding to the customers you want to add and click **Select**.
9. Click **Save**.

**Note:** The manual pricing rule is assigned to customers who meet any of the criteria defined under the **Generic Assignments**, **Customer Profile Assignments**, and **Specific Assignments** tabs.

## Modify Customer Assignment Attributes

An enterprise user can modify the customer attributes based on which a manual pricing rule is assigned to specific customers. In such a scenario, the enterprise user can modify the attributes displayed under the **Customer Profile Assignments** tab of the Manual Pricing Rule Summary screen.

To modify attributes:

1. Under the **Customer Profile Assignments** tab, select the row containing the attributes that you want to modify, and click **Modify**. Alternatively, double-click the row containing the attributes that you want to modify.
2. The Customer Rule dialog box is displayed. Modify the appropriate fields, and click **Save**.

## Remove Customer Assignment Attributes

An enterprise user can remove the customer attributes based on which a manual pricing rule is assigned to specific customers. In such a scenario, the enterprise user can remove the attributes displayed under the **Customer Profile Assignments** tab of the Manual Pricing Rule Summary screen.

To remove attributes:

1. Under the **Customer Profile Assignments** tab, select the attribute row that you want to remove, and click **Remove**.
2. A confirmation dialog box is displayed, asking whether you want to remove the assignment. Click **Yes**.  
The attribute row is removed.

## Remove Specific Customer Assignments

If an enterprise user does not want a manual pricing rule to be assigned to a specific customer, the user can remove the corresponding customer from the list of customers displayed under the **Specific Assignments** tab of the Manual Pricing Rule Summary screen.

To remove a customer assignment:

1. Under the **Specific Assignments** tab, select the customer by selecting the corresponding check box, and click **Remove**.
2. A confirmation dialog box is displayed, asking whether you want to remove the assignments. Click **Yes**.

The row containing the ID and name of the customer is removed.

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## Search and View a Manual Pricing Rule

You can search for a manual pricing rule and view its details using the following options:

- **Basic manual pricing rule search:** This type of search enables you to perform a quick search by specifying basic criteria such as the complete identifier or a partial identifier of the manual pricing rule, the identifier of the item the manual pricing rule applies to, or the manual pricing rule type.
- **Advanced manual pricing rule search:** This type of search enables you to perform a search based on the criteria the user selects. You can select the criteria and the corresponding operator, and then select or specify the corresponding values.

### Basic Manual Pricing Rule Search

To perform a basic manual pricing rule search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Manual Pricing Rule**. Alternatively, click the **Find Manual Pricing Rule** hyperlink in the home page.
3. The Basic Manual Pricing Rule Search screen is displayed. In the **Rule ID Contains** box, enter the complete identifier or a partial identifier of the manual pricing rule you want to search for.
4. Click the  icon adjacent the **Target Item Is** box to search for the item to which the rule applies.
5. The Item Search screen is displayed. In the **Basic Item Search** panel, enter the search criteria and click **Search**. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search**.
6. The items matching the search criteria are displayed. Select the relevant item by clicking the corresponding **Item ID** hyperlink. Alternatively, select the corresponding check box and click **Select**.
7. From the **Rule Type Is** drop-down list, select the manual pricing rule type.
8. In the **Status** field, select one of the following radio buttons:
  - **All:** Select this option to locate all the manual pricing rules that match the search criteria.
  - **Active:** Select this option to locate only the active manual pricing rules that match the search criteria.
  - **Inactive:** Select this option to locate only the inactive manual pricing rules that match the search criteria.
9. Select the **Only include manual pricing rules that are effective today** check box to search for only those manual pricing rules that are valid for the current date.
10. From the **Order By** drop-down list, select the order in which you want the search results to be sorted.
11. Click **Search**.

The manual pricing rules matching the search criteria are displayed. However, if only one manual pricing rule matches the search criteria, the corresponding Manual Pricing Rule Summary screen is displayed.

**Note:** If the administration organization is not a pricing organization, the manual pricing rules that are available for the pricing organization of the administration organization are displayed.

## Advanced Manual Pricing Rule Search

To perform an advanced manual pricing rule search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Manual Pricing Rule**. Alternatively, click the **Find Manual Pricing Rule** hyperlink in the home page.
3. The Manual Pricing Rule Search screen is displayed. Click **Advanced Search**.
4. The **Advanced Manual Pricing Rule Search** panel is displayed. From the **Select Criteria** drop-down list, select the criteria that you want to include in the search. For example, to search for a manual pricing rule by type, select **Manual Pricing Rule Type** from the **Select Criteria** drop-down list.
5. From the **Operator** drop-down list, select the operator you want to use for the search criteria.

In the corresponding box, enter or select the appropriate value for the criteria. The boxes are displayed based on the operator you select. For example, if you select **Effective Start Date** from the **Select Criteria** drop-down list, and **Between** from the **Operator** drop-down list, two boxes in which you can enter or select the appropriate dates, are displayed.

### Notes:

- It is mandatory that you select or enter at least one search criteria and a corresponding value.
  - If you select or enter more than one search criteria, the search will return the manual pricing rules that match all the criteria.
6. Click **Search**. The manual pricing rules matching the search criteria are displayed. However, if only one manual pricing rule matches the search criteria, the corresponding Manual Pricing Rule Summary screen is displayed.

**Note:** If the administration organization is not a pricing organization, the manual pricing rules that are available for the pricing organization of the administration organization are displayed.

## Add More Search Criteria

You can include additional search criteria to perform a more detailed search and narrow down the search results.

To include additional search criteria:

1. In the Advanced Manual Pricing Rule Search screen, click **Add More Criteria**.
2. A new row for specifying the search criteria is displayed. Enter the appropriate search criteria, and click **Search**.

The manual pricing rules matching the search criteria are displayed. However, if only one manual pricing rule matches the search criteria, the corresponding Manual Pricing Rule Summary screen is displayed.

**Note:** If the administration organization is not a pricing organization, the manual pricing rules that are available for the pricing organization of the administration organization are displayed.

## Save a Manual Pricing Rule Search

You can save a manual pricing rule search to avoid entering the corresponding search criteria every time you search for a particular manual pricing rule.

To save a manual pricing rule search:

1. From the **Pricing** menu, select **Find Manual Pricing Rule**. Alternatively, click the **Find Manual Pricing Rule** hyperlink in the home page.
2. The Manual Pricing Rule Search screen is displayed. In the **Basic Manual Pricing Rule Search** panel, enter the appropriate search criteria. Alternatively, click **Advanced Search** and enter the appropriate search criteria.
3. From the **Saved Searches** drop-down menu, select **Create Saved Search**.
4. The **Save Search** dialog box is displayed. In the **Saved Search Name\*** box, enter a name for the search that is to be saved.
5. Select the **Include in favorite searches** check box to mark the saved search as a favorite. Marking a saved search as a favorite enables you to quickly navigate to that saved search from the home page. A maximum of five most recent favorite saved searches are displayed as hyperlinks under the **Favorite Searches** panel in the home page. You can also access the favorite saved searches using the **Favorites** menu in the header bar of the home page.
6. Click **Save**.

**Note:** \* indicates that the field is mandatory.

## Perform a Search Using a Saved Manual Pricing Rule Search

To search for a manual pricing rule using a saved manual pricing rule search:

1. From the **Pricing** menu, select **Find Manual Pricing Rule**. Alternatively, click the **Find Manual Pricing Rule** hyperlink in the home page.
2. The Basic Manual Pricing Rule Search screen is displayed. Click **Saved Searches** to view the list of saved manual pricing rule searches. Alternatively, click **Advanced Search**, and then click **Saved Searches**.

The saved manual pricing rule searches are displayed in a menu, with the favorite saved searches, if any, displayed at the top of the list.

**Note:** A maximum of eight saved searches are displayed in the menu.

3. Perform either of the following tasks:
  - If the saved search is displayed in the menu, click the saved search name to view the corresponding search results.
  - If the saved search is not displayed in the menu, click **More Searches...** The Find Saved Searches for Manual Pricing Rules dialog box is displayed. In the **Saved Search Name Contains** box, enter either the complete or partial saved search name to filter the list of saved searches displayed in the **Saved Searches** panel. Double-click a saved search name to view the corresponding search

results. Alternatively, click a saved search name and click **Select** to view the corresponding search results.

**Note:** The **More Searches...** button is displayed only if there are more than eight saved pricing rule searches.

The Manual Pricing Rule Search screen is displayed with the search criteria automatically populated along with the search results.

## Modify a Saved Manual Pricing Rule Search

To modify a saved manual pricing rule search:

1. From the **Pricing** menu, select **Find Manual Pricing Rule**. Alternatively, click the **Find Manual Pricing Rule** hyperlink in the home page.
2. The Manual Pricing Rule Search screen is displayed. Click **Saved Searches** to view the list of saved manual pricing rule searches. Alternatively, click **Advanced Search**, and then click **Saved Searches**.

The saved manual pricing rule searches are displayed in a menu, with the favorite saved searches, if any, displayed at the top of the list.

**Note:** A maximum of eight saved searches are displayed in the menu.

3. Perform either of the following tasks:
  - If the saved search is displayed in the menu, click the saved search name to view the corresponding search screen.
  - If the saved search is not displayed in the menu, click **More Searches...** The Find Saved Searches for Manual Pricing Rules dialog box is displayed. In the **Saved Search Name Contains** box, enter either the complete or partial saved search name to filter the list of saved searches displayed in the **Saved Searches** panel. Double-click a saved search name to view the corresponding search screen. Alternatively, click a saved search name and click **Select** to view the corresponding search screen.

**Note:** The **More Searches...** button is displayed only if there are more than eight saved manual pricing rule searches.
4. The Manual Pricing Rule Search screen is displayed with the search criteria automatically populated. Modify the appropriate information, and select **Create Saved Search** from the **Saved Searches** drop-down menu.
5. The Save Search dialog box is displayed, with the name of the original saved search populated in the **Saved Search Name\*** box. Perform one of the following tasks:
  - To overwrite the original saved search, leave the name as is. The Confirm Overwrite dialog box, which contains a message asking you for confirmation about proceeding with the update of the original saved search, is displayed. Click **Yes**.
  - To save the search under a new name, enter a name for the search.
6. Select the **Include in favorite searches** check box to include the saved search in the list of favorites. If you select this check box, the saved search name will be displayed as a hyperlink in the home page and you can quickly navigate to this saved search by clicking the corresponding hyperlink.

7. Click **Save**.

**Note:** \* indicates that the field is mandatory.

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## Copy a Manual Pricing Rule

A pricing organization user can create a new manual pricing rule by creating a copy of an existing rule. When a user copies a manual pricing rule, all the conditions and effects defined in the original manual pricing rule are copied to the new manual pricing rule.

**Note:** The status of the new manual pricing rule created using the copying function will be set to INACTIVE even if the status of the manual pricing rule from which it is copied is ACTIVE.

To copy a manual pricing rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Manual Pricing Rule**. Alternatively, click the **Find Manual Pricing Rule** hyperlink in the home page.
3. The Manual Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. If only one manual pricing rule matches the search criteria, the Manual Pricing Rule Summary screen is displayed. Click the **Copy Manual Pricing Rule** related task.

If multiple manual pricing rules matches the search criteria, the list of manual pricing rules is displayed. Perform either of the following tasks:

- Select the manual pricing rule you want to copy by selecting the corresponding check box, and click **Copy**.

**Note:** You can copy only one manual pricing rule at a time.

- Click the **Rule ID** hyperlink or double-click the row corresponding to the manual pricing rule you want to copy. In the Manual Pricing Rule Summary screen, click the **Copy Manual Pricing Rule** related task.
5. The Copy Manual Pricing Rule dialog box is displayed. In the **New Rule ID\*** box, enter a unique identifier for the new manual pricing rule.
  6. Click **Create**.

The Manual Pricing Rule Summary screen pertaining to the new manual pricing rule is displayed.

**Note:** \* indicates that the field is mandatory.



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## Modify Manual Pricing Rule Details

An enterprise user or a pricing organization user can modify the details pertaining to a manual pricing rule. A pricing organization user can modify the description of a manual pricing rule, the date range within which a manual pricing rule is effective, the status of a manual pricing rule, the conditions under which a manual pricing rule will become applicable, and the effects of the manual pricing rule if those conditions are met. An enterprise user can modify only the assignment of a manual pricing rule to customers. If the pricing organization is an enterprise, the user can modify all the information pertaining to a manual pricing rule, including the assignment of the manual pricing rule to customers, and the modification of the conditions and effects.



To modify the details of a manual pricing rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Manual Pricing Rule**. Alternatively, click the **Find Manual Pricing Rule** hyperlink in the home page.
3. The Manual Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The manual pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the manual pricing rule.

**Note:** If only one manual pricing rule matches the search criteria, the details of the corresponding manual pricing rule are automatically displayed.

5. The Manual Pricing Rule Summary screen is displayed. Modify the appropriate fields depending on whether you are an enterprise user or a pricing organization user.

As a pricing organization user, you can modify the following:

- **Manual Pricing Rule Description\***: Modify the description of the manual pricing rule, as appropriate.
- **Effective Start Date\***: Modify the start date and start time of the manual pricing rule by clicking the corresponding  icon and selecting the time from the drop-down list. The start date and start time indicate the date and time from which the manual pricing rule becomes effective.
- **Effective End Date\***: Modify the end date and end time of the manual pricing rule by clicking the corresponding  icon and selecting the time from the drop-down list. The end date and end time indicate the date and time until which the manual pricing rule is effective.

**Note:** \* indicates that the field is mandatory.

As an enterprise user, you can perform the following task:

- [Assign a Manual Pricing Rule to Customers](#)

As a pricing organization user, you can perform the following tasks:

- [Modify the Status of a Manual Pricing Rule](#)
- [Delete a Manual Pricing Rule](#)
- [Modify the Conditions and Effects of a Manual Pricing Rule Based on the Order Total](#)

- [Modify the Conditions and Effects of a Manual Pricing Rule Based on the Combination of Items](#)
- [Modify the Conditions and Effects of a Manual Pricing Rule Based on the Item Quantity](#)
- [Copy a Manual Pricing Rule](#)

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## Modify the Conditions and Effects of a Manual Pricing Rule Based on the Combination of Items

A pricing organization user can modify the conditions under which a manual pricing rule based on the combination of items will become applicable, and the effects of this manual pricing rule on the price applied to an order when those conditions are met.

To modify the conditions and effects of a manual pricing rule based on the combination of items:


1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Manual Pricing Rule**. Alternatively, click the **Find Manual Pricing Rule** hyperlink in the home page.
3. The Basic Manual Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The manual pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the manual pricing rule.

**Note:** If only one manual pricing rule matches the search criteria, the details of the corresponding manual pricing rule are automatically displayed.



5. The Manual Pricing Rule Summary screen is displayed. Modify the information in the **Conditions** tab, as required.

The following table describes the fields in the **Conditions** tab of the Manual Pricing Rule Summary screen:

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| Field  | Description  |
|--|--|
| IF An order is placed in <currency name or any> currency   | Select one of the following options: <ul style="list-style-type: none"><li>▪ From the drop-down list, select the currency used in the order, for example, USD.</li><li>▪ Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if only one currency is defined for the pricing organization.<br/><b>Note:</b> If you select the <b>any</b> option, you can use the manual pricing rule to apply only a percentage discount or a percentage surcharge, and not an absolute discount or an absolute surcharge on the price applied to the order.</li></ul>  |
| AND the order contains <any or all> of the following items | Select one of the following options: <ul style="list-style-type: none"><li>▪ <b>any:</b> One of the conditions under which this manual pricing rule will function is that the order must contain at least one of the items you specify in the Item ID fields.</li><li>▪ <b>all:</b> One of the conditions under which this manual pricing rule will function is that the order must contain all the items you specify in the Item ID field.</li></ul>  |
| Item ID*   | Click the  icon to search for the item that the order must contain for this manual pricing rule to function. The Basic Item Search screen is displayed. Enter the search criteria and click <b>Search</b> . Alternatively, click <b>Advanced Search</b> , enter the search criteria, and click <b>Search</b> . The items matching the search criteria are displayed. Select the relevant item by clicking the corresponding <b>Item ID</b> hyperlink. Alternatively, select the corresponding check box and click <b>Select</b> . |

---

| Field  | Description  |
|--|--|
| with a quantity of*<br><quantity> Each   | Enter the minimum quantity of the item the order must contain for this manual pricing rule to function.  |
| Add Item   | <p>Click this to specify an additional item. A new row for specifying the item and the minimum quantity of the item is displayed. Enter the identifier of the item and the minimum quantity of the item.</p> <p>To delete an item, click the  icon adjacent the item you want to delete.</p> <p><b>Note:</b> You cannot define a manual pricing rule by adding the same Item ID multiple times.</p>   |
| THEN Allow a maximum   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>absolute discount:</b> Select this option to apply an absolute discount on the item if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li>▪ <b>percentage discount:</b> Select this option to apply a percentage discount on the item if the specified conditions are met.</li> <li>▪ <b>absolute surcharge:</b> Select this option to apply an absolute surcharge on the item if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li>▪ <b>percentage surcharge:</b> Select this option to apply a percentage surcharge on the item if the specified conditions are met.</li> </ul> |
| of* <discount amount or surcharge amount>  | <p>Enter the maximum amount that cannot be exceeded when overriding the amount to be either discounted from the price or charged as surcharge in the Sterling Field Sales application.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>▪ If this field is left blank, the amount to be either discounted from the price or charged as surcharge in the Sterling Field Sales application can be overridden to any value.</li> <li>▪ The value in this field should not be less than the default pricing adjustment value.</li> </ul>  |
| with a default of<br><discount amount or surcharge amount>   | <p>Enter the default amount that will be either discounted from the price or charged as surcharge.</p> <p><b>Note:</b> The default amount can be overridden in the Sterling Field Sales application, but this amount cannot exceed the maximum amount configured.</p>  |
| to the item* <Item ID> for every occurrence of the item on the order   | <p>Click the  icon to search for the item to which the discount or surcharge is to be applied. The Basic Item Search screen is displayed. Enter the search criteria and click <b>Search</b>. Alternatively, click <b>Advanced Search</b>, enter the search criteria, and click <b>Search</b>. The items matching the search criteria are displayed. Select the relevant item by clicking the corresponding <b>Item ID</b> hyperlink. Alternatively, select the corresponding check box and click <b>Select</b>. The discount or surcharge will be applied on all the units of the items specified in the Item ID fields earlier.</p>  |
| For analytics and accounting purpose, the <discount or surcharge> shall be collected against the charge name | <p>From the drop-down list, select the charge name that is to be associated with the discount or surcharge. The charge name is used to track the amount of discount or surcharge that has been applied to an order.</p>  |

6. Click **Submit**.

**Note:** \* indicates that the field is mandatory.

---

## Modify the Conditions and Effects of a Manual Pricing Rule Based on the Item Quantity

A pricing organization user can modify the conditions under which a manual pricing rule based on the quantity of an item will become applicable, and the effects of this manual pricing rule on the price applied to an order when the conditions are met.

To modify the conditions and effects of a manual pricing rule based on item quantity:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Manual Pricing Rule**. Alternatively, click the **Find Manual Pricing Rule** hyperlink in the home page.
3. The Basic Manual Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The manual pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the manual pricing rule.

**Note:** If only one manual pricing rule matches the search criteria, the details of the corresponding manual pricing rule are automatically displayed.





5. The Manual Pricing Rule Summary screen is displayed. Modify the information in the **Conditions** tab, as required.

The following table describes the fields in the **Conditions** tab of the Manual Pricing Rule Summary screen:

---

| Field  | Description   |
|--|---|
| IF An order is placed in <currency name or any> currency | <p>Select one of the following options:</p> <ul style="list-style-type: none"><li>▪ From the drop-down list, select the currency used in the order, for example, USD.</li><li>▪ Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if only one currency is defined for the pricing organization.</li></ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the manual pricing rule to apply only a percentage discount or a percentage surcharge, and not an absolute discount or an absolute surcharge on the price applied to the order.</p> |

---

| Field  | Description   |
|--|---|
| AND IF the order contains items where the item's <attribute or Item ID> is in the following list | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>attribute:</b> One of the conditions under which this pricing rule will function is that the order must contain items with the attributes you specify in the Attribute ID fields. <p>To specify an attribute, click the  icon adjacent the <b>Attribute ID</b> box to search for the corresponding Attribute ID.</p> <p>To add a new attribute, click <b>Add Attribute</b>.</p> <p>To remove an attribute, click the  icon adjacent the attribute you want to remove.</p> <p><b>Note:</b> You cannot define a pricing rule by adding the same attribute multiple times.</p> </li> <li>▪ <b>Item ID*:</b> One of the conditions under which the manual pricing rule will function is that the order must contain items with the Item IDs you specify in the Item ID fields. <p>To specify an Item ID, click the  icon adjacent the <b>Item ID</b> box to search for the corresponding Item ID.</p> <p>To add an additional Item ID, click <b>Add Item</b>. To remove an item, click the  icon adjacent the item you want to remove.</p> <p><b>Note:</b> You cannot define a manual pricing rule by adding the same Item ID multiple times.</p> </li> </ul> |
| AND IF the quantity of the item is greater than*   | <p>Enter the minimum quantity of the item the order must contain for this manual pricing rule to function. For example, if you enter 200, one of the conditions under which this manual pricing rule will function is that the quantity of the items with the specified attributes or Item IDs in the order must be greater than 200.</p>   |
| THEN Allow a maximum   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>absolute discount:</b> Select this option to apply an absolute discount on the item if the specified conditions are met. <p><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</p> </li> <li>▪ <b>percentage discount:</b> Select this option to apply a percentage discount on the item if the specified conditions are met.</li> <li>▪ <b>absolute surcharge:</b> Select this option to apply an absolute surcharge on the item if the specified conditions are met. <p><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</p> </li> <li>▪ <b>percentage surcharge:</b> Select this option to apply a percentage surcharge on the item if the specified conditions are met.</li> </ul>  |
| of* <discount amount or surcharge amount>  | <p>Enter the maximum amount that cannot be exceeded when overriding the amount to be either discounted from the price or charged as surcharge in the Sterling Field Sales application.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>▪ If this field is left blank, the amount to be either discounted from the price or charged as surcharge in the Sterling Field Sales application can be overridden to any value.</li> <li>▪ The value in this field should not be less than the default pricing adjustment value.</li> </ul>   |

| Field   | Description  |
|---|--|
| with a default of<br><discount amount or<br>surcharge amount><br>Apply to all occurrences<br>of the matching item on<br>the order | Enter the amount that will be either discounted from the price or charged as surcharge by default.<br><b>Note:</b> The default amount can be overridden in the Sterling Field Sales application, but this amount cannot exceed the maximum amount configured.  |
| For analytics and<br>accounting purpose, the<br><discount or surcharge><br>shall be collected against<br>the charge name          | If at least one of the conditions applies a discount to the order, select the appropriate charge name from <b>the discount shall be collected against the charge name</b> drop-down list. If at least one of the conditions applies surcharge to the order, select the appropriate charge name from <b>the surcharge shall be collected against the charge name</b> drop-down list. The charge name is used to track the amount of discount or surcharge that has been applied to the order. |

#### 6. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition to a manual pricing rule based on the quantity of an item:

1. In the Manual Pricing Rule Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for a manual pricing rule based on the quantity of an item, under the **Conditions** tab of the Manual Pricing Rule Summary screen, click the  icon adjacent the condition you want to delete. The condition will no longer be displayed.

**Note:** The  icon is displayed only if more than one condition is defined.



---

## Modify the Conditions and Effects of a Manual Pricing Rule Based on the Order Total

A pricing organization user can modify the conditions under which a manual pricing rule based on the order total will become applicable, and the effects of this pricing rule on the price applied to an order when the conditions are met.

To modify the conditions and effects of a manual pricing rule based on the order total:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Manual Pricing Rule**. Alternatively, click the **Find Manual Pricing Rule** hyperlink in the home page.
3. The Basic Manual Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The manual pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the manual pricing rule.

**Note:** If only one manual pricing rule matches the search criteria, the details of the corresponding manual pricing rule are automatically displayed.

5. The Manual Pricing Rule Summary screen is displayed. Modify the information in the **Conditions** tab, as required.

The following table describes the fields in the **Conditions** tab of the Manual Pricing Rule Summary screen:

---

| Field  | Description  |
|--|--|
| IF An order is placed in <currency name or any> currency | Select one of the following options: <ul style="list-style-type: none"><li>▪ From the drop-down list, select the currency used in the order, for example, USD.</li><li>▪ Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if only one currency is defined for the pricing organization.<br/><b>Note:</b> If you select the <b>any</b> option, you can use this manual pricing rule to apply only a percentage discount or a percentage surcharge, and not an absolute discount or an absolute surcharge to the price applied to the order.</li></ul> |
| AND IF the order total is greater than*                  | Enter the appropriate amount. For example, if you enter 1000, one of the conditions under which this manual pricing rule will function is that the order total of the order must be greater than \$1,000 if USD is the currency you specified.   |

---

| Field  | Description  |
|--|--|
| THEN Allow a maximum of* <discount amount or surcharge amount>   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>absolute discount:</b> Select this option to apply an absolute discount on the order total if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li>▪ <b>percentage discount:</b> Select this option to apply a percentage discount on the order total if the specified conditions are met.</li> <li>▪ <b>absolute surcharge:</b> Select this option to apply an absolute surcharge on the order total if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li>▪ <b>percentage surcharge:</b> Select this option to apply a percentage surcharge on the order total if the specified conditions are met.</li> </ul> |
| with a default of <discount amount or surcharge amount>  | <p>Enter the maximum amount that cannot be exceeded when overriding the amount to be either discounted from the price or charged as surcharge in the Sterling Field Sales application.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>▪ If this field is left blank, the amount to be either discounted from the price or charged as surcharge in the Sterling Field Sales application can be overridden to any value.</li> <li>▪ The value in this field should not be less than the default pricing adjustment value.</li> </ul>  |
| For analytics and accounting purpose, the <discount or surcharge> shall be collected against the charge name | <p>If at least one of the conditions applies discount to the order, select the appropriate charge name from <b>the discount shall be collected against the charge name</b> drop-down list. If at least one of the conditions applies surcharge to the order, then select the appropriate charge name from <b>the surcharge shall be collected against the charge name</b> drop-down list. The charge name is used to track the amount of discount or surcharge that has been applied to the order.</p>   |

## 6. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition to a manual pricing rule based on the order total:

1. In the Manual Pricing Rule Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for a manual pricing rule based on the order total, under the **Conditions** tab of the Manual Pricing Rule Summary screen, click the  icon adjacent the condition you want to delete. The condition will no longer be displayed.

**Note:** The  icon is displayed only if more than one condition is defined.

---

## Modify the Status of a Manual Pricing Rule

A manual pricing rule can be in either Active status or Inactive status. A manual pricing rule can have an effect on the quote price only if it is in Active status. A pricing organization user can assign a manual pricing rule that is in Inactive status to a customer, but that will have no effect on the price adjustments made to the quote until the rule is activated.

A pricing organization user can change the status of a manual pricing rule to either Active or Inactive.

To modify the status of a manual pricing rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Manual Pricing Rule**. Alternatively, click the **Find Manual Pricing Rule** hyperlink in the home page.
3. The Manual Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The manual pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the manual pricing rule.  
**Note:** If only one manual pricing rule matches the search criteria, the details of the corresponding manual pricing rule are automatically displayed.
5. The Manual Pricing Rule Summary screen is displayed. Perform either of the following tasks:
  - If the status of the manual pricing rule is INACTIVE, click **Activate** to activate the manual pricing rule.
  - If the status of the manual pricing rule is ACTIVE, click **Deactivate** to deactivate the manual pricing rule.
6. Click **Save**.

---

## Delete a Manual Pricing Rule

A pricing organization user can delete a manual pricing rule only if the status of the manual pricing rule is Inactive. To delete a manual pricing rule that is assigned to a customer, you must first remove the customer assignments.

To delete a manual pricing rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Manual Pricing Rule**. Alternatively, click the **Find Manual Pricing Rule** hyperlink in the home page.
3. The Manual Pricing Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The manual pricing rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the manual pricing rule.

**Note:** If only one manual pricing rule matches the search criteria, the details of the corresponding manual pricing rule are automatically displayed.

5. The Manual Pricing Rule Summary screen is displayed. Click **Delete**.  
The manual pricing rule is deleted and the home page is displayed.

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## Create an Approval Rule

You, as an enterprise user, can create approval rules that will be used to set and enforce discount policies in the Sterling Field Sales application. For example, you can create an approval rule with the condition that if the discount offered on a quote exceeds the maximum discount allowed on that quote, the quote must be approved by the corresponding approver before it is presented to a customer.

The following table lists the types of approval rules that can be created. The corresponding topics containing detailed information pertaining to these tasks are listed adjacent to the approval rule types. Click a topic name to access details pertaining to that topic.

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| Approval Rule Type | Topic   |
|--------------------|---|
| Header             | <a href="#">Create a Header Approval Rule</a> |
| Line               | <a href="#">Create a Line Approval Rule</a>   |

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## Create a Header Approval Rule

You, as an enterprise user, can create an approval rule to be applied at the quote header level. If the conditions in this rule are met, a customer sales representative can apply the corresponding discount as a header level discount in the corresponding quote. However, the discount must still be approved by an approver as part of the quote lifecycle.

To create a header approval rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Approval Rule**. Alternatively, click the **New Approval Rule** hyperlink in the home page.
3. The Create Approval Rule screen is displayed. Select the **Header** option.
4. In the **Approval Rule ID\*** box, enter a unique identifier for the approval rule. The Rule ID, which is used to identify the approval rule, must be unique for each pricing organization.
5. Click **Submit**.
6. The Approval Rule Summary screen is displayed. In the **Approval Rule Information** panel, the Approval Rule Type you selected is displayed.
7. From the **Message Code** drop-down list, select a message code. Depending on the message code selected, the **Message** box is automatically populated.

**Note:** The options in the **Message Code** drop-down list are displayed only if you have set the approval rule violation reasons in the Applications Manager.

8. Select the start date by clicking the  icon adjacent the **Effective Start Date\*** field. Select the start time from the drop-down list. The start date and start time indicate the date and time from which the approval rule becomes effective.
9. Select the end date by clicking the  icon adjacent the **Effective End Date\*** field. Select the end time from the drop-down list. The end date and the end time indicate the date and time until which the approval rule is effective.
10. Select the **Override all other rules** check box to make this approval rule as an override rule. If you have selected this check box, an approval from the corresponding approver is not required.
11. In the **Conditions** panel, perform the following steps:
  - a. To add a condition, click **Add Condition**.
  - b. In the row that is added, click the  icon adjacent the *<entity attributes for condition>* field to select a header-level entity attribute. For example, you can select manual discount, item attribute, and so on in the dialog box that is displayed.
  - c. A dialog box containing the available entity attributes in a tree hierarchy is displayed. Select an entity attribute depending on fields that are displayed in the dynamic panel. For example, if you

select Item Attribute from the tree hierarchy, a field that enables the selection of the corresponding attribute value is displayed.

**Note:** If you select Customer Rating entity attribute from the tree hierarchy in step c, the query type is not available for selection. For example, if you select the Role entity attribute from the tree hierarchy, the query types available are “equals” and “equals ignore case”. In case of Customer Rating, the query type is defaulted to “is”.

- d. To create multiple conditions, click **Add Condition**. However, you must define a condition completely before adding a new condition.
- e. A new row is added. Repeat step b and step c.
- f. You can establish an “and” or “or” relationship between the conditions in a rule. Perform the following steps to establish a relationship between conditions in a rule:
  - From the **<Operator>** drop-down list in the dynamic panel, select **And** to establish an “and” relationship between the conditions in a rule. If all the selected conditions are evaluated as True, the result will be True. If any of the selected conditions are evaluated as False, the result will be False.
  - From the **<Operator>** drop-down list in the dynamic panel, select **Or** to establish an “or” relationship between the conditions in a rule. If any of the selected conditions are evaluated as True, the result will be True. If all the selected conditions are evaluated as False, the result will be False.
- g. To negate a condition, select a condition and click **Not**. The entity attribute in the selected condition is negated.

**Notes:**

- You can select only one condition in a rule at a time.
  - You cannot select multiple operators between the conditions in a group. For example, if you have created three conditions, A, B, and C, you can either establish an “and” relationship or an “or” relationship between the conditions.
  - You cannot modify the sequence of the fields in the row in which a condition is created.
- h. Click **Save**.

## Group Conditions in a Header Approval Rule

Perform the following steps to group the conditions:

1. Under the **Conditions** panel in the Approval Rule Summary screen, press the Ctrl key and select the conditions that you want to group. Ensure that all the conditions that are selected for grouping are selected completely and are consecutive. However, you cannot group a condition with an existing group.
2. Click **Group**.

## Ungroup Conditions in a Header Approval Rule

Perform the following steps to ungroup the conditions:



1. Under the **Conditions** panel in the Approval Rule Summary screen, press the Ctrl key and select the group of conditions that you want to ungroup.
2. Click **Un Group**.

## Modify the Sequence of the Conditions in a Header Approval Rule

Perform the following steps to modify the sequence of the conditions:

1. Under the **Conditions** panel in the Approval Rule Summary screen, select the condition that you want to move up or down by clicking it.
2. Click either the **Move up** or **Move Down** buttons.

**Note:** When you modify the sequence of conditions, the operators that you have assigned to the conditions also move along with the conditions. In such a scenario, the relationship between the conditions can change based on the operators assigned to the conditions.

## Remove a Condition from a Header Approval Rule

Perform the following steps to remove a condition from a header approval rule:

1. Under the **Conditions** panel in the Approval Rule Summary screen, select the condition that you want to remove by clicking it.
2. Click **Remove Condition**.
3. **Note:** The **Remove Condition** button is enabled only if a condition is selected.  
The condition is removed from the approval rule.

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## Create a Line Approval Rule

You, as an enterprise user, can create an approval rule that can be applied at a line level in a quote. When the conditions in this rule are satisfied, a customer sales representative can apply the corresponding discount as a line-level discount in the corresponding quote. However, if an approver rejects the line-level discount, the entire quote is rejected.

To create a line approval rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Approval Rule**. Alternatively, click the **New Approval Rule** hyperlink in the home page.
3. The Create Approval Rule screen is displayed. Select the **Line Level** option.
4. In the **Approval Rule ID\*** box, enter a unique identifier for the approval rule. The Rule ID, which is used to identify the approval rule, must be unique for each pricing organization.
5. Click **Submit**.
6. The Approval Rule Summary screen is displayed. In the **Approval Rule Information** panel, the Approval Rule Type you selected is displayed.
7. From the **Message Code** drop-down list, select a message code. Depending on the message code selected, the **Message** box is automatically populated.

**Note:** The options in the **Message Code** drop-down list are displayed only if you have set the approval rule violation reasons in the Applications Manager.

8. Select the start date by clicking the  icon adjacent the **Effective Start Date\*** field. Select the start time from the drop-down list. The start date and start time indicate the date and time from which the approval rule becomes effective.
9. Select the end date by clicking the  icon adjacent the **Effective End Date\*** field. Select the end time from the drop-down list. The end date and the end time indicate the date and time until which the approval rule is effective.
10. Select the **Override all other rules** check box to make this approval rule as an override rule. If you have selected this check box, an approval from the corresponding approver is not required.
11. In the **Conditions** panel, perform the following steps:
  - a. To add a condition, click **Add Condition**.
  - b. In the row that is added, click the  icon adjacent the *<entity attributes for condition>* field to select a -level entity attribute. For example, you can select manual discount, item attribute, and so on in the dialog box that is displayed.
  - c. A dialog box containing the available entity attributes in a tree hierarchy is displayed. Select an entity attribute depending on fields that are displayed in the dynamic panel. For example, if you select Item Attribute from the tree hierarchy, a field that enables the selection of the corresponding attribute value is displayed.

- d. To create multiple conditions, click **Add Condition**. However, you must define a condition completely before adding a new condition
- e. A new row is added. Repeat step b and step c.
- f. You can establish an “and” or “or” relationship between the conditions in a rule. Perform the following steps to establish a relationship between conditions in a rule:
  - From the *<Operator>* drop-down list in the dynamic panel, select **And** to establish an “and” relationship between the conditions in a rule. If all the selected conditions are evaluated as True, the result will be True. If any of the selected conditions are evaluated as False, the result will be False.
  - From the *<Operator>* drop-down list in the dynamic panel, select **Or** to establish an “or” relationship between the conditions in a rule. If any of the selected conditions are evaluated as True, the result will be True. If all the selected conditions are evaluated as False, the result will be False.
- g. To negate a condition, select a condition and click **Not**. The entity attribute in the selected condition is negated.

**Notes:**

- You can select only one condition in a rule at a time.
  - You cannot select multiple operators between the conditions in a group. For example, if you have created three conditions, A, B, and C, you can either establish an “and” relationship or an “or” relationship between the conditions.
  - You cannot modify the sequence of the fields in the row in which a condition is created.
- h. Click **Save**.

## Group Conditions in a Line Approval Rule

Perform the following steps to group the conditions:

1. Under the **Conditions** panel in the Approval Rule Summary screen, press the Ctrl key and select the conditions that you want to group. Ensure that all the conditions that are selected for grouping are selected completely and are consecutive. However, you cannot group a condition with an existing group.
2. Click **Group**.

## Ungroup Conditions in a Line Approval Rule

Perform the following steps to ungroup the conditions:

1. Under the **Conditions** panel in the Approval Rule Summary screen, press the Ctrl key and select the group of conditions that you want to ungroup.
2. Click **Un Group**.

## Modify the Sequence of the Conditions in a Line Approval Rule

Perform the following steps to modify the sequence of the conditions:

1. Under the **Conditions** panel in the Approval Rule Summary screen, select the condition that you want to move up or down by clicking it.
2. Click either the **Move up** or **Move Down** buttons.

**Note:** When you modify the sequence of conditions, the operators that you have assigned to the conditions also move along with the conditions. In such a scenario, the relationship between the conditions can change based on the operators assigned to the conditions.

## Remove a Condition from a Line Approval Rule

Perform the following steps to remove a condition from a line approval rule:

1. Under the **Conditions** panel in the Approval Rule Summary screen, select the condition that you want to remove by clicking it.
2. Click **Remove Condition**.
3. **Note:** The **Remove Condition** button is enabled only if a condition is selected.  
The condition is removed from the approval rule.

---

## Search and View an Approval Rule

You, as an enterprise user, can search for an approval rule belonging to your enterprise and view its details using the following options:

- **Basic approval rule search:** This type of search enables you to perform a quick search by specifying basic criteria such as the complete identifier or partial identifier of the approval rule, the identifier of the item the approval rule applies to, or the approval rule type.
- **Advanced approval rule search:** This type of search enables you to perform a search based on the criteria that is selected. You can select the criteria and the corresponding operator, and then select or specify the corresponding values.

### Basic Approval Rule Search

To perform a basic approval rule search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Approval Rule**. Alternatively, click the **Find Approval Rule** hyperlink in the home page.
3. The Approval Rule Search screen is displayed. In the **Rule ID Contains** box, enter the complete identifier or partial identifier of the approval rule you want to search for.
4. In the **Message Contains** box, enter a word or a string of words in the message that was provided for the approval rule.
5. In the **Status** field, select one of the following radio button:
  - **All:** Select this option to locate all the approval rules that match the search criteria.
  - **Active:** Select this option to locate only the active approval rules that match the search criteria.
  - **Inactive:** Select this option to locate only the inactive approval rules that match the search criteria.
6. Select the **Only include approval rules that are effective today** check box to search only for approval rules that are valid for the current date.
7. Select the **Only show override rules** check box to search for the override approval rules.
8. Click **Search**.
9. The approval rules matching the search criteria are displayed. In case of multiple approval rules matching the search criteria, select the check box adjacent the approval rule whose details you want to view, and click **Select**. The Approval Rule Summary screen is displayed. However, if there is only one approval rule matching the search criteria, the Approval Rule Summary screen pertaining to that rule is displayed.

## Advanced Approval Rule Search

To perform an advanced approval rule search:

1. Log in to Sterling Business Center as an administrator.
  2. From the **Pricing** menu, select **Find Approval Rule**. Alternatively, click the **Find Approval Rule** hyperlink in the home page.
  3. The Approval Rule Search screen is displayed. Click **Advanced Search**.
  4. The **Advanced Approval Rule Search** panel is displayed. From the **Select Criteria** drop-down list, select the criteria that you want to include in the search. For example, to search for an approval rule by ID, select **Rule ID Contains** from the **Select Criteria** drop-down list.
  5. Perform the following steps:
    - a. From the **Operator** drop-down list, select the operator you want to use for the search criteria.
    - b. In the corresponding box, enter or select the appropriate value for the criteria.  
  
The boxes are displayed based on the operator you select. For example, if you select **Message Code** from the **Select Criteria** drop-down list, a drop-down list from which you can select the appropriate message code, is displayed.
- Note:** It is mandatory that you select or enter at least one search criteria and a corresponding value. If you select or enter more than one search criteria, the search will return the approval rules that match all the criteria.
6. Click **Search**.
  7. The approval rules matching the search criteria are displayed. In case of multiple approval rules matching the search criteria, select the check box adjacent the approval rule whose details you want to view, and click **Select**. The Approval Rule Summary screen is displayed. However, if there is only one approval rule matching the search criteria, the Approval Rule Summary screen pertaining to the approval rule is displayed.

### Add More Search Criteria

You can include additional search criteria to perform a more detailed search and narrow down the search results.

To include additional search criteria:

1. In the Advanced Approval Rule Search screen, click **Add More Criteria**.
2. A new row for specifying the search criteria is displayed. Enter the appropriate search criteria. For example, from the **Operator** drop-down list, select the operator you want to use for the search criteria, and in the corresponding box, enter or select the appropriate value for the criteria.

## Save an Approval Rule Search

You can save an approval rule search to avoid entering the corresponding search criteria every time you search for a particular approval rule.

To save an approval rule search:

1. From the **Pricing** menu, select **Find Approval Rule**. Alternatively, click the **Find Approval Rule** hyperlink in the home page.
2. The Approval Rule Search screen is displayed. In the **Basic Approval Rule Search** panel, enter the appropriate search criteria. Alternatively, click **Advanced Search** and enter the appropriate search criteria.
3. From the **Saved Searches** drop-down menu, select **Create Saved Search**.
4. The **Save Search** dialog box is displayed. In the **Saved Search Name\*** box, enter a name for the search.
5. Select the **Include in favorite searches** check box to mark the saved search as a favorite. Marking a saved search as a favorite enables you to quickly navigate to that saved search from the home page. A maximum of five most recent favorite saved searches are displayed as hyperlinks under the **Favorite Searches** panel in the home page. You can also access the favorite saved searches using the **Favorites** menu in the header bar of the home page.
6. Click **Save**.

**Note:** \* indicates that the field is mandatory.

## Perform a Search Using a Saved Approval Rule Search

To search for an approval rule using a saved approval rule search:

1. From the **Pricing** menu, select **Find Approval Rule**. Alternatively, click the **Find Approval Rule** hyperlink in the home page.
2. The Basic Approval Rule Search screen is displayed. Click **Saved Searches** to view the list of saved approval rule searches. Alternatively, click **Advanced Search**, and then click **Saved Searches**.

The saved approval rule searches are displayed in a menu, with the favorite saved searches, if any, displayed at the top of the list.

**Note:** A maximum of eight saved searches are displayed in the menu.

3. Perform either of the following tasks:
  - If the saved search is displayed in the menu, click the saved search to view the corresponding search results.
  - If the saved search is not displayed in the menu, click **More Searches...** The Find Saved Searches for Approval Rules dialog box is displayed. In the **Saved Search Name Contains** box, enter either the complete or partial saved search name to filter the list of saved searches displayed in the **Saved**

**Searches** panel. Double-click a saved search name to view the corresponding search results. Alternatively, click a saved search name and click **Select** to view the corresponding search results.

**Note:** The **More Searches...** button is displayed only if there are more than eight saved approval rule searches.

The Approval Rule Search screen is displayed with the search criteria automatically populated in along with the search results.

## Modify a Saved Approval Rule Search

To modify a saved approval rule search:

1. From the **Pricing** menu, select **Find Approval Rule**. Alternatively, click the **Find Approval Rule** hyperlink in the home page.
2. The Approval Rule Search screen is displayed. Click **Saved Searches** to view the list of saved approval rule searches. Alternatively, click **Advanced Search**, and then click **Saved Searches**.  
The saved approval rule searches are displayed in the menu, with the favorite saved searches, if any, displayed at the top of the list.  
**Note:** A maximum of eight saved searches are displayed in the menu.
3. Perform either of the following steps:
  - If the saved search is displayed in the menu, click the saved search to view the corresponding search screen.
  - If the saved search is not displayed in the menu, click **More Searches...** The Find Saved Searches for Approval Rules dialog box is displayed. In the **Saved Search Name Contains** box, enter either the complete or partial saved search name to filter the list of saved searches displayed in the **Saved Searches** panel. Double-click a saved search name to view the corresponding search screen. Alternatively, click a saved search name, and click **Select** to view the corresponding search screen.  
**Note:** The **More Searches...** button is displayed only if there are more than eight saved approval rule searches.
4. The Approval Rule Search screen is displayed with the search criteria populated automatically. Modify the information, and select **Create Saved Search** from the **Saved Searches** drop-down menu.
5. The Save Search dialog box is displayed, with the name of the original saved search populated in the **Saved Search Name\*** box. Perform one of the following steps:
  - To overwrite the original saved search, leave the name as is. The Confirm Overwrite dialog box, which contains a message asking you for confirmation about proceeding with the update of the original saved search, is displayed. Click **Yes**.
  - To save the search under a new name, enter a name for the search.
6. Select the **Include in favorite searches** check box to include the saved search in the list of favorites. If you select this check box, the saved search name will be displayed as a hyperlink in the home page and you can quickly navigate to this saved search by clicking the corresponding hyperlink.
7. Click **Save**.

**Note:** \* indicates that the field is mandatory.



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## Copy an Approval Rule

You, as an enterprise user, can create a new approval rule from an existing approval rule by copying it. When a user copies an approval rule, all the conditions and the result defined in the original approval rule are copied to the new approval rule.

**Note:** The status of the new approval rule created by copying an approval rule will be set to **INACTIVE** even if the status of the approval rule from which it is copied is **ACTIVE**.

To copy an approval rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Approval Rule**. Alternatively, click the **Find Approval Rule** hyperlink in the home page.
3. The Basic Approval Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. If only one approval rule matches the search criteria, the Approval Rule Summary screen is displayed. Click the **Copy Approval Rule** related task.

If multiple approval rules match the search criteria, the list of approval rules is displayed. Perform either of the following tasks:

- Select the approval rule you want to copy by selecting the corresponding check box, and click **Copy**.

**Note:** You can copy only one approval rule at a time.

- Click the **Rule ID** hyperlink or double-click the row corresponding to the approval rule you want to copy. In the Approval Rule Summary screen, click the **Copy Approval Rule** related task.
5. The Copy Approval Rule dialog box is displayed. In the **New Rule ID\*** box, enter a unique identifier for the new approval rule.
  6. Click **Create**.

The Approval Rule Summary screen pertaining to the new approval rule is displayed.

**Note:** \* indicates that the field is mandatory.

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## Modify Approval Rule Details

You, as an enterprise user, can modify the details pertaining to an approval rule belonging to an enterprise. You can modify the date range within which an approval rule is effective, the status of an approval rule, the conditions under which an approval rule will become applicable, and the result of the approval rule if those conditions are met.

To modify the details of an approval rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Approval Rule**. Alternatively, click the **Find Approval Rule** hyperlink in the home page.
3. The Basic Approval Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The approval rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the approval rule.

**Note:** If only one approval rule matches the search criteria, the details of the corresponding approval rule are automatically displayed.

5. The Approval Rule Summary screen is displayed. Modify the appropriate fields as follows:
  - **Effective Start Date\***: Modify the start date and start time of the approval rule by clicking the corresponding  icon and selecting the time from the drop-down list. The start date and start time indicate the date and time from which the approval rule becomes effective.
  - **Effective End Date\***: Modify the end date and end time of the approval rule by clicking the corresponding  icon and selecting the time from the drop-down list. The end date and end time indicate the date and time until which the approval rule is effective.
  - **Override all other rules**: Select or clear this check box depending on whether or not you want to make this approval rule an override rule.

**Note:** \* indicates that the field is mandatory.

See also:

- [Modify the Status of an Approval Rule](#)
- [Modify the Conditions in a Header Approval Rule](#)
- [Modify the Conditions in a Line Approval Rule](#)
- [Copy an Approval Rule](#)
- [Delete an Approval Rule](#)

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## Modify the Conditions in a Header Approval Rule


You, as an enterprise user, can modify the conditions under which an approval rule based on the quote header level will become applicable.

To modify the conditions in a header approval rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Approval Rule**. Alternatively, click the **Find Approval Rule** hyperlink in the home page.
3. The Basic Approval Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The approval rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the approval rule.

**Note:** If one approval rule matches the search criteria, the details of the corresponding approval rule are automatically displayed.

The Approval Rule Summary screen is displayed.

5. In the **Conditions** panel, perform the following steps:
  - a. Click the condition that you want to modify.
  - b. In the row that is displayed, click the  icon adjacent the *<entity attributes for condition>* field to select a new header-level entity attribute. For example, you can select manual discount, item attribute, and so on in the dialog box that is displayed.
  - c. A dialog box containing the available entity attributes in a tree hierarchy is displayed. Select an entity attribute depending on fields that are displayed in the dynamic panel. For example, if you select Item Attribute from the tree hierarchy, a field that enables the selection of the corresponding attribute value is displayed.

**Note:** If you select Customer Rating entity attribute from the tree hierarchy in step c, the query type is not available for selection. For example, if you select the Role entity attribute from the tree hierarchy, the query types available are “equals” and “equals ignore case”. In case of Customer Rating, the query type is defaulted to “is”.

- d. You can establish an “and” or “or” relationship between the conditions in a rule. Perform the following steps to establish a relationship between conditions in a rule:
  - From the *<Operator>* drop-down list in the dynamic panel, select **And** to establish an “and” relationship between the conditions in a rule. If all the selected conditions are evaluated as True, the result will be True. If any of the selected conditions are evaluated as False, the result will be False.
  - From the *<Operator>* drop-down list in the dynamic panel, select **Or** to establish an “or” relationship between the conditions in a rule. If any of the selected conditions are evaluated as True, the result will be True. If all the selected conditions are evaluated as False, the result will be False.

- e. To negate a condition, select the condition and click **Not**. The entity attribute in the condition is negated.

**Notes:**

- You can select only one condition in a rule at a time.
  - You cannot select multiple operators between the conditions in a group. For example, if you have created three conditions, A, B, and C, you can either establish an “and” relationship or an “or” relationship between the conditions.
  - You cannot modify the sequence of the fields in the row in which a condition is created.
- f. Click **Save**.

## Group Conditions in a Header Approval Rule

Perform the following steps to group the conditions:

1. Under the **Conditions** panel in the Approval Rule Summary screen, press the Ctrl key and select the conditions that you want to group. Ensure that all the conditions that are selected for grouping are selected completely and are consecutive. However, you cannot group a condition with an existing group.
2. Click **Group**.

## Ungroup Conditions in a Header Approval Rule

Perform the following steps to ungroup the conditions:

1. Under the **Conditions** panel in the Approval Rule Summary screen, press the Ctrl key and select the group of conditions that you want to ungroup.
2. Click **Un Group**.

## Modify the Sequence of the Conditions in a Header Approval Rule

Perform the following steps to modify the sequence of the conditions:

1. Under the **Conditions** panel in the Approval Rule Summary screen, select the condition that you want to move up or down by clicking it.
2. Click either the **Move up** or **Move Down** buttons.

**Note:** When you modify the sequence of conditions, the operators that you have assigned to the conditions also move along with the conditions. In such a scenario, the relationship between the conditions can change based on the operators assigned to the conditions.

## Remove a Condition from a Header Approval Rule

Perform the following steps to remove a condition from a header approval rule:

1. Under the **Conditions** panel in the Approval Rule Summary screen, select the condition that you want to remove by clicking it.
2. Click **Remove Condition**.
3. **Note:** The **Remove Condition** button is enabled only if one condition is selected.  
The condition is removed from the approval rule.

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## Modify the Conditions in a Line Approval Rule


You, as an enterprise user, can modify the conditions under which an approval rule will become applicable.

To modify the conditions in a line approval rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Approval Rule**. Alternatively, click the **Find Approval Rule** hyperlink in the home page.
3. The Basic Approval Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The approval rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the approval rule.

**Note:** If one approval rule matches the search criteria, the details of the corresponding approval rule are automatically displayed.

The Approval Rule Summary screen is displayed.

5. In the **Conditions** panel, perform the following steps:
  - a. Click the condition that you want to modify.
  - b. In the row that is displayed, click the  icon adjacent the *<entity attributes for condition>* field to select a new line-level entity attribute. For example, you can select manual discount, item attribute, and so on in the dialog box that is displayed.
  - c. A dialog box containing the available entity attributes in a tree hierarchy is displayed. Select an entity attribute depending on fields that are displayed in the dynamic panel. For example, if you select Item Attribute from the tree hierarchy, a field that enables the selection of the corresponding attribute value is displayed.
  - d. You can establish an “and” or “or” relationship between the conditions in a rule. Perform the following steps to establish a relationship between conditions in a rule:
    - From the *<Operator>* drop-down list in the dynamic panel, select **And** to establish an “and” relationship between the conditions in a rule. If all the selected conditions are evaluated as True, the result will be True. If any of the selected conditions are evaluated as False, the result will be False.
    - From the *<Operator>* drop-down list in the dynamic panel, select **Or** to establish an “or” relationship between the conditions in a rule. If any of the selected conditions are evaluated as True, the result will be True. If all the selected conditions are evaluated as False, the result will be False.
  - e. To negate a condition, select the condition and click **Not**. The entity attribute in the condition is negated.

### Notes:

- You can select only one condition in a rule at a time.

- You cannot select multiple operators between the conditions in a group. For example, if you have created three conditions, A, B, and C, you can either establish an “and” relationship or an “or” relationship between the conditions.
  - You cannot modify the sequence of the fields in the row in which a condition is created.
- f. Click **Save**.

## Group Conditions in a Header Approval Rule

Perform the following steps to group the conditions:

1. Under the **Conditions** panel in the Approval Rule Summary screen, press the Ctrl key and select the conditions that you want to group. Ensure that all the conditions that are selected for grouping are selected completely and are consecutive. However, you cannot group a condition with an existing group.
2. Click **Group**.

## Ungroup Conditions in a Header Approval Rule

Perform the following steps to ungroup the conditions:

1. Under the **Conditions** panel in the Approval Rule Summary screen, press the Ctrl key and select the group of conditions that you want to ungroup.
2. Click **Un Group**.

## Modify the Sequence of the Conditions in a Header Approval Rule

Perform the following steps to modify the sequence of the conditions:

1. Under the **Conditions** panel in the Approval Rule Summary screen, select the condition that you want to move up or down by clicking it.
2. Click either the **Move up** or **Move Down** buttons.

**Note:** When you modify the sequence of conditions, the operators that you have assigned to the conditions also move along with the conditions. In such a scenario, the relationship between the conditions can change based on the operators assigned to the conditions.

## Remove a Condition from a Line Approval Rule

Perform the following steps to remove a condition from a line approval rule:

1. Under the **Conditions** panel in the Approval Rule Summary screen, select the condition that you want to remove by clicking it.
2. Click **Remove Condition**.
3. **Note:** The **Remove Condition** button is enabled only if a condition is selected.  
The condition is removed from the approval rule.

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## Modify the Status of an Approval Rule

An approval rule can be in either **Active** status or **Inactive** status. An approval rule can have an effect on a quote only if it is in **Active** status.

An enterprise user can change the status of an approval rule to either Active or Inactive.

To change the status of an approval rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Approval Rule**. Alternatively, click the **Find Approval Rule** hyperlink in the home page.
3. The Basic Approval Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The approval rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the approval rule.

**Note:** If only one approval rule matches the search criteria, the details of the corresponding approval rule are automatically displayed.

5. The Approval Rule Summary screen is displayed. Perform either of the following tasks:
  - If the status of the approval rule is **INACTIVE**, click **Activate** to activate the approval rule.
  - If the status of the approval rule is **ACTIVE**, click **Deactivate** to deactivate the approval rule.
6. Click **Save**.



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## Delete an Approval Rule

You, as an enterprise user, can delete an approval rule. The **Delete** button is enabled only if the status of an approval rule is **Inactive**.

To delete an approval rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Approval Rule**. Alternatively, click the **Find Approval Rule** hyperlink in the home page.
3. The Basic Approval Rule Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The approval rules matching the search criteria are displayed. Click the **Rule ID** hyperlink or double-click the row corresponding to the approval rule.

**Note:** If only one approval rule matches the search criteria, the details of the corresponding approval rule are automatically displayed.

5. The Approval Rule Summary screen is displayed. Click **Delete**.  
The approval rule is deleted and the home page is displayed.

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## Create a Coupon

A coupon is used to make pricing adjustments to an order. These adjustments will be applicable only if the coupon is applied to the order and certain conditions are met. A coupon is characterized by conditions and effects. When a condition pertaining to a coupon is satisfied, the corresponding effect is applied to the order price. While pricing adjustments are made automatically in the context of pricing rules, for a coupon to affect an order's price, a user must add the coupon manually to the order.

The effect of a coupon is applied to the order price as a discount. Discounts can either be an absolute amount or a percentage amount. A coupon that modifies an order price by an absolute amount can be applied only to a single currency. A coupon that modifies an order price by a percentage amount can be applied either to a single currency or all currencies.

While a pricing organization user can only create or modify a coupon, an enterprise user can only assign a coupon to customers.

A pricing organization user can create the following types of coupons:

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| To Create Coupon of Type | Click Here  |
|--------------------------|---|
| Combination              | <a href="#">Create a Coupon Based on the Combination of Items Ordered</a> |
| Item Quantity            | <a href="#">Create a Coupon Based on Item Quantity</a>                    |
| Order Total              | <a href="#">Create a Coupon Based on the Order Total</a>                  |
| Ship Order Total         | <a href="#">Create a Coupon Based on the Ship Order Total</a>             |

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## Create a Coupon Based on the Combination of Items Ordered

A combination coupon is a type of coupon that is used to make price adjustments to an order based on the combination of items being ordered. For example, an organization can create a coupon for which a customer gets a DVD player free of cost if the customer buys a TV, or a customer gets a 10% discount on DVDs if the customer buys a DVD player.



Only a pricing organization user can create a combination coupon.


To create a combination coupon:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Coupon**. Alternatively, click the **New Coupon** hyperlink in the home page.
3. The Create Coupon screen is displayed. Select the **Combination** option.
4. In the **Coupon ID\*** box, enter a unique identifier for the coupon. The Coupon ID, which is used to identify the coupon, must be unique for the pricing organization.  
**Note:** Pricing rules and coupons cannot share the same identifier. For example, if you enter ABC in the **Coupon ID\*** box, and if a pricing rule with ABC as the Pricing Rule ID exists, an error message is displayed.
5. Click **Submit**.
6. The Coupon Summary screen is displayed. In the **Coupon Information** panel, the Coupon Type you selected and the Coupon ID you entered are displayed. In the **Coupon Description\*** box, enter a brief description of the coupon.
7. In the **Effective Start Date\*** field, select the start date by clicking the  icon, and select the start time from the drop-down list. The start date and start time indicate the date and time from which the coupon becomes effective.
8. In the **Effective End Date\*** field, select the end date by clicking the  icon, and select the end time from the drop-down list. The end date and end time indicate the date and time until which the coupon is effective.
9. Select the **This coupon can be combined with other coupons** check box in order to enable this coupon to be used with other coupons.
10. Select the **Apply even if the item price has been manually overridden** check box to apply price adjustments to the order even after the item's price has been manually overridden.

11. In the **Conditions** tab, enter the appropriate information.

The following table describes the fields in the **Conditions** tab of the Coupon Summary screen:

| Field  | Description  |
|--|--|
| IF An order is placed in <currency name or any> currency   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>From the drop-down list, select the currency used for the price of the items in the order, for example, <b>USD</b>, <b>Euro</b>, and so on.</li> <li>Select the <b>any</b> option if the currency used for the price of the items in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.</li> </ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the coupon to apply only a percentage discount and not an absolute discount on the order price.</p>                              |
| AND the order contains <any or all> of the following items | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>any:</b> One of the conditions under which the coupon will apply is that the order must contain at least one of the items you will specify in the Item ID fields.</li> <li><b>all:</b> One of the conditions under which the coupon will apply is that the order must contain all the items you will specify in the Item ID fields.</li> </ul>   |
| Item ID*   | <p>Enter the identifier of the item that the order must contain for the coupon to apply.</p> <p>Alternatively, click the  icon to search for the corresponding Item ID. The Basic Item Search screen is displayed. Enter the search criteria and click <b>Search</b>. Alternatively, click <b>Advanced Search</b>, enter the search criteria, and click <b>Search</b>. The items matching the search criteria are displayed. Select the item by clicking the corresponding <b>Item ID</b> hyperlink. Alternatively, select the corresponding check box and click <b>Select</b>.</p> |
| with a quantity of*  | <p>Enter the minimum quantity of the item that the order must contain for the coupon to apply.</p>   |
| Add Item   | <p>Click this to specify an additional item. A new row for specifying the item and the minimum quantity of the item is displayed. Enter the identifier of the item and the minimum quantity of the item.</p> <p>To delete an item, click the  icon corresponding to the item you want to delete.</p> <p><b>Note:</b> You cannot define a coupon by adding an Item ID multiple times.</p>  |
| THEN Apply   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>an absolute discount:</b> Select this option to apply an absolute discount on the item if the specified conditions are met.</li> </ul> <p><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</p> <ul style="list-style-type: none"> <li><b>a percentage discount:</b> Select this option to apply a percentage discount on the item if the specified conditions are met.</li> </ul>  |
| of*  | <p>Enter the amount to be discounted from the price. For example, if you enter an absolute discount of \$25, the amount of \$25 will be discounted from the price if the specified conditions are met.</p>   |

| Field   | Description  |
|---|--|
| to the item*  | Click the  icon to search for the item to which the discount is to be applied. The Basic Item Search screen is displayed. Enter the search criteria and click <b>Search</b> . Alternatively, click <b>Advanced Search</b> , enter the search criteria, and click <b>Search</b> . The items matching the search criteria are displayed. Select the item by clicking the corresponding <b>Item ID</b> hyperlink. Alternatively, select the corresponding check box and click <b>Select</b> .  |
| each  | Select one of the following options: <ul style="list-style-type: none"> <li>▪ <b>for one quantity on the order:</b> Select this option to apply the discount on a single unit of the items specified in the Item ID fields earlier.</li> <li>▪ <b>for every occurrence of the item on the order:</b> Select this option to apply the discount on all the units of the items specified in the Item ID fields earlier.</li> <li>▪ <b>once for each combination of items above:</b> Select this option to apply the discount on each combination of the items specified earlier. For example, if you specify that a customer will get a 15% discount on a printer if the customer buys two computers, the customer will get only a 15% discount on a printer even if the customer buys two computers and two printers. However, if the customer buys four computers and two printers, the customer will get a 15% discount on both the printers.</li> </ul> |
| For analytics and accounting purpose, the discount shall be collected against the charge name | From the drop-down list, select the charge name that is to be associated with the discount. The charge name is used to track the amount of discount that has been applied to an order.   |

12. Click **Submit**.

**Note:** \* indicates that the field is mandatory.



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## Create a Coupon Based on Item Quantity

An item quantity coupon is a type of coupon that changes the unit price of an item based on the quantity of items being ordered. For example, if an organization wants to offer three items for \$150, and five items for \$200, the organization can create an item quantity coupon that will adjust the price on the order accordingly when a customer adds the coupon to an order.


Only a pricing organization user can create a coupon based on item quantity.

To create a coupon based on item quantity:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Coupon**. Alternatively, click the **New Coupon** hyperlink in the home page.
3. The Create Coupon screen is displayed. Select the **Item Quantity** option.
4. In the **Coupon ID\*** box, enter a unique identifier for the coupon. The Coupon ID, which is used to identify the coupon, must be unique for the pricing organization.  
**Note:** Pricing rules and coupons cannot share the same identifier. For example, if you enter ABC in the **Coupon ID\*** box, and if a pricing rule with ABC as the Pricing Rule ID exists, an error message is displayed.
5. Click **Submit**.
6. The Coupon Summary screen is displayed. In the **Coupon Information** panel, the Coupon Type you selected and the Coupon ID you entered are displayed. In the **Coupon Description\*** box, enter a brief description of the coupon.
7. In the **Effective Start Date\*** field, select the start date by clicking the  icon, and select the start time from the drop-down list. The start date and start time indicate the date and time from which the coupon becomes effective.
8. In the **Effective End Date\*** field, select the end date by clicking the  icon, and select the end time from the drop-down list. The end date and end time indicate the date and time until which the coupon is effective.
9. Select the **This coupon can be combined with other coupons** check box in order to enable this coupon to be used with other coupons.
10. Select the **Apply even if the item price has been manually overridden** check box to apply price adjustments even after the item's price has been manually overridden.

11. In the **Conditions** tab, enter the appropriate information.

The following table describes the fields in the **Conditions** tab of the Coupon Summary screen:

| Field   | Description   |
|---|---|
| IF An order is placed in <currency name or any> currency                                      | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>From the drop-down list, select the currency used in the order, for example, <b>USD</b>, <b>Euro</b>, and so on.</li> <li>Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.</li> </ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the coupon to apply only a percentage discount and not an absolute discount on the order price.</p> |
| AND IF the order contains the item*   | <p>Click the  icon to search for the Item ID of the item contained in the order. One of the conditions under which the coupon will apply is that the order must contain the item with the Item ID you specify.</p>   |
| AND IF the quantity of the item is greater than*  | <p>Enter the minimum quantity of the item that the order must contain for the coupon to apply. For example, if you enter 200, one of the conditions under which the coupon will apply is that the quantity of the items with the specified attributes or Item IDs in the order must be greater than 200.</p>  |
| THEN apply  | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>an absolute discount:</b> Select this option to apply an absolute discount on the item if the specified conditions are met.</li> </ul> <p><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</p> <ul style="list-style-type: none"> <li><b>a percentage discount:</b> Select this option to apply a percentage discount on the item if the specified conditions are met.</li> </ul>                                     |
| of*   | <p>Enter the amount to be discounted from the price. For example, if you enter an absolute discount of \$25, the amount of \$25 will be discounted from the price if the specified conditions are met.</p>  |
| Apply to  | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>a single occurrence:</b> Select this option to apply the discount on a single unit of the item.</li> <li><b>all occurrences:</b> Select this option to apply the discount on all the units of the item.</li> </ul>  |
| For analytics and accounting purpose, the discount shall be collected against the charge name | <p>From the drop-down list, select the charge name that is to be associated with the discount. The charge name is used to track the amount of discount that has been applied to an order.</p>   |

12. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition to an item quantity coupon:

1. In the Coupon Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for an item quantity coupon, under the **Conditions** tab of the Coupon Summary screen, click the  icon corresponding to the condition you want to delete. The condition is no longer displayed.

**Note:** The  icon is displayed only if multiple conditions are defined.





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## Create a Coupon Based on the Order Total

An order total coupon is a type of coupon that changes the total amount charged to a customer based on the order total. For example, an organization can create a coupon for which a customer can get a 25% discount if the customer buys goods worth \$5,000 or more. Thus, if the customer buys goods worth \$5,000, the total amount charged to the customer will be \$3,750.

Only a pricing organization user can create a coupon based on the order total.

To create a coupon based on the order total:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Coupon**. Alternatively, click the **New Coupon** hyperlink in the home page.
3. The Create Coupon screen is displayed. Select the **Order Total** option.
4. In the **Coupon ID\*** box, enter a unique identifier for the coupon. The Coupon ID, which is used to identify the coupon, must be unique for the pricing organization.  
**Note:** Pricing rules and coupons cannot share the same identifier. For example, if you enter ABC in the **Coupon ID\*** box, and if a pricing rule with ABC as the Pricing Rule ID exists, an error message is displayed.
5. Click **Submit**.
6. The Coupon Summary screen is displayed. In the **Coupon Information** panel, the Coupon Type you selected and the Coupon ID you entered are displayed. In the **Coupon Description\*** box, enter a brief description of the coupon.
7. In the **Effective Start Date\*** field, select the start date by clicking the  icon, and select the start time from the drop-down list. The start date and start time indicate the date and time from which the coupon becomes effective.
8. In the **Effective End Date\*** field, select the end date by clicking the  icon, and select the end time from the drop-down list. The end date and end time indicate the date and time until which the coupon is effective.
9. Select the **This coupon can be combined with other coupons** check box to allow the coupon to be used with other coupons.
10. Select the **Apply results to the line and not to the order** check box to apply the effects of the coupon at the order line level and not the order level.

11. In the **Conditions** tab, enter the appropriate information.

The following table describes the fields in the **Conditions** tab of the Coupon Summary screen:

| Field   | Description   |
|---|---|
| IF An order is placed in <currency name or any> currency                                      | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>From the drop-down list, select the currency used in the order, for example, <b>USD</b>, <b>Euro</b>, and so on.</li> <li>Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.</li> </ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the coupon to apply only a percentage discount and not an absolute discount on the order price.</p> |
| AND IF the order total is greater than*   | Enter the appropriate amount. For example, if you enter 1000, one of the conditions under which the coupon will apply is that the order total of the order must be greater than \$1,000 if USD is the currency you specified.   |
| THEN apply  | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>An absolute discount:</b> Select this option to apply an absolute discount on the order total if the specified conditions are met.<br/><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</li> <li><b>A percentage discount:</b> Select this option to apply a percentage discount on the order total if the specified conditions are met.</li> </ul>   |
| of*   | Enter the amount to be discounted from the order total. For example, if you enter an absolute discount of \$100, the amount of \$100 will be discounted from the order total if the specified conditions are met.   |
| For analytics and accounting purpose, the discount shall be collected against the charge name | From the drop-down list, select the charge name that is to be associated with the discount. The charge name is used to track the amount of discount that has been applied to an order.  |

12. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition to an order total coupon:

- In the Coupon Summary screen, under the **Conditions** tab, click **Add Condition**.
- A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for an order total coupon, under the **Conditions** tab of the Coupon Summary screen, click the  icon corresponding to the condition you want to delete. The condition is no longer displayed.

**Note:** The  icon is displayed only if multiple conditions are defined.



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## Create a Coupon Based on the Ship Order Total

A ship order total coupon is a type of coupon that changes the total shipping charges that is charged to a customer based on the order total. For example, an organization can create a coupon under which a customer can get a 100% discount on shipping charges if the customer buys goods worth \$5,000 or more.

Only a pricing organization user can create a coupon based on the ship order total.

To create a coupon based on the ship order total:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **New Coupon**. Alternatively, click the **New Coupon** hyperlink in the home page.
3. The Create Coupon screen is displayed. Select the **Ship Order Total** option.
4. In the **Coupon ID\*** box, enter a unique identifier for the coupon. The Coupon ID, which is used to identify the coupon, must be unique for the pricing organization.  
**Note:** Pricing rules and coupons cannot share the same identifier. For example, if you enter ABC in the **Coupon ID\*** box, and if a pricing rule with ABC as the Pricing Rule ID exists, an error message is displayed.
5. Click **Submit**.
6. The Coupon Summary screen is displayed. In the **Coupon Information** panel, the Coupon Type you selected and the Coupon ID you entered are displayed. In the **Coupon Description\*** box, enter a brief description of the coupon.
7. In the **Effective Start Date\*** field, select the start date by clicking the  icon, and select the start time from the drop-down list. The start date and start time indicate the date and time from which the coupon becomes effective.
8. In the **Effective End Date\*** field, select the end date by clicking the  icon, and select the end time from the drop-down list. The end date and end time indicate the date and time until which the coupon is effective.
9. Select the **This coupon can be combined with other coupons** check box in order to enable this coupon to be used with other coupons.
10. Select the **Apply results to the line and not to the order** check box to apply the effects of the coupon at the order line level and not the order level.

11. In the **Conditions** tab, enter the appropriate information.

The following table describes the fields in the **Conditions** tab of the Coupon Summary screen:

| Field   | Description  |
|---|--|
| IF An order is placed in <currency name or any> currency                                      | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>From the drop-down list, select the currency used in the order. For example, if you select <b>USD</b>, one of the conditions under which the coupon will apply is that the currency used for the price of the items in the order must be USD.</li> <li>Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.</li> </ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the coupon to apply only a percentage discount and not an absolute discount on the order price.</p> |
| AND IF the order <ships completely or ships separately>                                       | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>ships completely:</b> Select this option to apply the coupon on orders for which the shipping preference is that the items in the order are shipped in as few shipments as possible.</li> <li><b>ships separately:</b> Select this option to apply the coupon on orders for which the shipping preference is that the items in the order are shipped as and when they become available.</li> </ul>   |
| via <carrier service name>  | <p>From the drop-down list, select the carrier service used to ship the order. For example, if you select Express Overnight as the carrier, one of the conditions under which the coupon will apply is that the carrier used to ship the order must be Express Overnight.</p>  |
| AND IF the order total is greater than*   | <p>Enter the appropriate amount. For example, if you enter 1000, one of the conditions under which the coupon will apply is that the order total of the order must be greater than \$1,000 if USD is the currency you specified.</p>   |
| THEN apply  | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li><b>An absolute discount:</b> Select this option to apply an absolute discount on the shipping charges if the specified conditions are met.</li> <li><b>A percentage discount:</b> Select this option to apply a percentage discount on the shipping charges if the specified conditions are met.</li> <li><b>A maximum shipping charge:</b> Select this option to apply the maximum shipping charge if the specified conditions are met. The maximum shipping charge is a flat fee which, when applied, will replace the current shipping charges for the order.</li> </ul>   |
| of*   | <p>Enter the amount to be either discounted from the shipping charges. For example, if you enter an absolute discount of \$100, the amount of \$100 will be discounted from the shipping charges if the specified conditions are met.</p>  |
| For analytics and accounting purpose, the discount shall be collected against the charge name | <p>From the drop-down list, select the charge name that is to be associated with the discount. The charge name is used to track the amount of discount that has been applied to an order.</p>  |

12. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition to a ship order total coupon:

1. In the Coupon Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for a ship order total coupon, under the **Conditions** tab of the Coupon Summary screen, click the  icon corresponding to the condition you want to delete. The condition is no longer displayed.

**Note:** The  icon is displayed only if multiple conditions are defined.

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## Assign a Coupon to Customers

After a coupon is created, an enterprise user can assign a coupon to customers of the corresponding enterprise. When a coupon is assigned to customers, the coupon will be used to adjust the order price when the customers add the coupon to the order.

**Note:** Only an enterprise user can assign a coupon to customers.

To assign a coupon to customers:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Coupon**. Alternatively, click the **Find Coupon** hyperlink in the home page.
3. The Basic Coupon Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The coupons matching the search criteria are displayed. Click the **Coupon ID** hyperlink or double-click the row corresponding to the coupon.


**Note:** If there is only one coupon matching the search criteria, the details of the corresponding coupon are automatically displayed.

5. The Coupon Summary screen is displayed. Under the **Assign To Customers** tab, the following tabs are displayed:
  - Generic Assignments
  - Customer Profile Assignments
  - Specific Assignments
6. In the **Generic Assignments** tab, specify the generic assignments for the coupon by performing one or more of the following tasks:
  - **This coupon is not assigned to any customer:** Select this option to assign the coupon to customers at a later point of time. If you select this option, the coupon cannot be used to adjust the order price.
  - **This coupon is applicable to all customers:** Select this option to assign the coupon to all customers. If you select this option, all the customers of an enterprise can use the coupon to adjust the prices applied to their orders.
  - **This coupon is applicable to the following customers:** Select this option to assign the coupon to different types of customers such as anonymous users, all consumer customers, and all business customers. Select the appropriate check box:

The following table describes the check boxes under the **This coupon is applicable to the following customers** option:

| Check Box              | Description  |
|------------------------|--|
| Anonymous users        | Select this check box to assign the coupon to all anonymous users. An anonymous user is a user who can add items to the cart without logging in to the Sterling Web application. If you select this check box, the coupon will be used to adjust the prices applied to orders pertaining to all the anonymous users. |
| All consumer customers | Select this check box to assign the coupon to all the consumer customers of the corresponding enterprise. If you select this check box, the coupon will be used to adjust the prices applied to orders pertaining to all the consumer customers.   |
| All business customers | Select this check box to assign the coupon to all the business customers of the corresponding enterprise. If you select this check box, the coupon will be used to adjust the prices applied to orders pertaining to all the business customers.   |

**Note:** If you select both the **All consumer customers** check box and the **All business customers** check box, the **Customer Profile Assignments** tab and the **Specific Assignments** tab are disabled. This is because the coupon will be applicable to all consumer and business customers and you do not need to specify any customer attribute criteria using the **Customer Profile Assignments** tab or add specific business customers using the **Specific Assignments** tab. Similarly, if you select the **All business customers** check box without selecting the **All consumer customers** check box, only the **Specific Assignments** tab is disabled.

7. Under the **Customer Profile Assignments** tab, specify the criteria based on customer attributes such as **Vertical**, **Relationship Type**, **Membership Level**, and **Region**. The coupon will be applicable to any customer who fulfills any of the criteria defined under this tab. For example, you can create a coupon that will be applicable only to Government customers or customers who are resellers. Click **Add** to add a customer attribute criteria. The Customer Rule dialog box is displayed. Add one or multiple criteria, as required, and click **Save**:
  - From the **Vertical** drop-down list, select the customer's vertical market, for example, **Education**, **Government**, and so on.
  - From the **Relationship Type** drop-down list, select the relationship type of the customer, for example, **Reseller**, **Retailer**, **Distributor**, and so on. The relationship type indicates the type of relationship the customer has with the enterprise.
  - From the **Membership Level** drop-down list, select the customer's membership level, for example, **Gold**, **Silver**, **Platinum**, and so on.
  - Click the  icon adjacent the **Region** box. The Regions dialog box is displayed. Select the appropriate region.

**Note:** It is mandatory that you select at least one criteria.



8. Under the **Specific Assignments** tab, add the ID and name of the business customers to whom you want to assign the coupon. The coupon will be applicable to all the customers defined under this tab. To add a customer, perform the following tasks:
  - a. Click **Add**.
  - b. The Customer Search dialog box is displayed. Enter the appropriate search criteria and click **Search**.
  - c. The ID and name of the customers matching the search criteria are displayed in the **Customer List** panel. Select the check boxes corresponding to the customers you want to add and click **Select**.
9. Click **Save**.

**Note:** The coupon is assigned to customers who meet any of the criteria defined under the **Generic Assignments**, **Customer Profile Assignments**, and **Specific Assignments** tabs.

## Modify Customer Assignment Attributes

An enterprise user can modify the customer attributes based on which a coupon is assigned to specific customers. In such a scenario, the enterprise user can modify the attributes displayed under the **Customer Profile Assignments** tab of the Coupon Summary screen.

To modify attributes:

1. Under the **Customer Profile Assignments** tab, select the row containing the attributes that you want to modify, and click **Modify**. Alternatively, double-click the row containing the attributes that you want to modify.
2. The Customer Rule dialog box is displayed. Modify the appropriate fields, and click **Save**.

## Remove Customer Assignment Attributes

An enterprise user can remove the customer attributes based on which a coupon is assigned to specific customers. In such a scenario, the enterprise user can remove the attributes displayed under the **Customer Profile Assignments** tab of the Coupon Summary screen.

To remove attributes:

1. Under the **Customer Profile Assignments** tab, select the row of attributes that you want to remove, and click **Remove**.
2. A confirmation dialog box is displayed, asking whether you want to remove the assignment. Click **Yes**.  
The row of attributes is removed.

## Remove Specific Customer Assignments

If an enterprise user does not want a coupon to be assigned to a specific customer, the user can remove the corresponding customer from the list of customers displayed under the **Specific Assignments** tab of the Coupon Summary screen.

To remove a customer assignment:

1. Under the **Specific Assignments** tab, select the customer by selecting the corresponding check box, and click **Remove**.
2. A confirmation dialog box is displayed, asking whether you want to remove the assignments. Click **Yes**.

The row containing the ID and name of the customer is removed.

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## Search for a Coupon

A user can search for a coupon and view its details using the following options:

- **Basic coupon search:** This type of search enables a user to perform a quick search by specifying basic criteria such as the complete or partial Coupon ID, the ID of the item the coupon applies to, or the coupon type.
- **Advanced coupon search:** This type of search enables a user to perform a search based on the criteria the user selects. The user can select the criteria and the corresponding operator, and then select or specify the corresponding values.

### Basic Coupon Search

To perform a basic coupon search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Coupon**. Alternatively, click the **Find Coupon** hyperlink in the home page.
3. The Coupon Search screen is displayed. Under the **Basic Coupon Search** panel, in the **Coupon ID Contains** box, enter either the complete or partial ID of the coupon you want to search for.
4. Click the  icon adjacent the **Target Item Is** box to search for the item to which the coupon is to be applied. The Item Search screen is displayed. In the **Basic Item Search** panel, enter the search criteria and click **Search**. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search**. The items matching the search criteria are displayed. Select the item by clicking the corresponding **Item ID** hyperlink. Alternatively, select the corresponding check box and click **Select**.
5. From the **Coupon Type Is** drop-down list, select the coupon type.
6. Select the **Only include coupons that are effective today** check box to search for only the coupons that are valid for the current date.
7. Click **Search**. The coupons matching the search criteria are displayed. However, if there is only one coupon matching the search criteria, the Coupon Summary screen is displayed.

**Note:** If the administration organization is not a pricing organization, the coupons that are available for the pricing organization of the administration organization are displayed.

### Advanced Coupon Search

To perform an advanced coupon search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Coupon**. Alternatively, click the **Find Coupon** hyperlink in the home page.
3. The Basic Coupon Search screen is displayed. Click **Advanced Search**.

4. The Advanced Coupon Search panel is displayed. From the **Select Criteria** drop-down list, select the criteria you want to include in the search. For example, to search for a coupon by status, select **Coupon Status** from the **Select Criteria** drop-down list.
5. From the **Operator** drop-down list, select the operator you want to use for the search criteria.

In the corresponding box, enter or select the appropriate value for the criteria. The boxes are displayed based on the operator you select. For example, if you select **Effective Start Date** from the **Select Criteria** drop-down list, and **Between** from the **Operator** drop-down list, two boxes in which you can enter or select the appropriate dates, are displayed.

**Note:** It is mandatory that you select or enter at least one search criteria and a corresponding value. If you select or enter more than one search criteria, the search will return the coupons that match all the criteria.

6. Click **Search**. The coupons matching the search criteria are displayed. However, if there is only one coupon matching the search criteria, the Coupon Summary screen is displayed.

**Note:** If the administration organization is not a pricing organization, the coupons that are available for the pricing organization of the administration organization are displayed.

## Add More Search Criteria

You can include additional search criteria to perform a more detailed search and narrow down the search results.

To include additional search criteria:

1. In the Advanced Coupon Search panel, click **Add More Criteria**.
2. A new row for specifying the search criteria is displayed. Enter the appropriate search criteria, and click **Search**.

The coupons matching the search criteria are displayed. However, if there is only one coupon matching the search criteria, the Coupon Summary screen is displayed.

**Note:** If the administration organization is not a pricing organization, the coupons that are available for the pricing organization of the administration organization are displayed.

## Save a Coupon Search

You can save a coupon search to avoid entering the search criteria every time you search for a particular coupon.

To save a coupon search:

1. From the **Pricing** menu, select **Find Coupon**. Alternatively, click the **Find Coupon** hyperlink in the home page.
2. The Coupon Search screen is displayed. In the **Basic Coupon Search** panel, enter the appropriate search criteria. Alternatively, click **Advanced Search** and enter the appropriate search criteria.
3. From the **Saved Searches** drop-down menu, select **Create Saved Search**.
4. The Save Search dialog box is displayed. In the **Saved Search Name\*** box, enter a name for the search that is to be saved.

5. Select the **Include in favorite searches** check box to mark the saved search as a favorite. Marking a saved search as a favorite enables you to quickly navigate to that saved search from the home page. A maximum of five most recent favorite saved searches are displayed as hyperlinks under the **Favorite Searches** panel in the home page. You can also access the favorite saved searches using the **Favorites** menu in the header bar of the home page.
6. Click **Save**.

## Perform a Search Using a Saved Coupon Search

To search for a coupon using a saved coupon search:

1. From the **Pricing** menu, select **Find Coupon**. Alternatively, click the **Find Coupon** hyperlink in the home page.
2. The Basic Coupon Search screen is displayed. Click **Saved Searches** to view the list of saved coupon searches. Alternatively, click **Advanced Search** and then click **Saved Searches**.

The saved coupon searches are displayed in a menu, with the favorite saved searches, if any, displayed at the top of the list.

**Note:** A maximum of eight saved searches are displayed in the menu.

3. Perform either of the following tasks:
  - If the saved search is displayed in the menu, click the saved search to view the corresponding search results.
  - If the saved search is not displayed in the menu, click **More Searches...** The Find Saved Searches for Coupons dialog box is displayed. In the **Saved Search Name Contains** box, enter either the complete or partial saved search name to filter the list of saved searches displayed in the **Saved Searches** panel. Double-click a saved search name to view the corresponding search results. Alternatively, click a saved search name and click **Select** to view the corresponding search results.

**Note:** The **More Searches...** button is displayed only if there are more than eight saved coupon searches.

The Coupon Search screen is displayed with the search criteria filled in along with the search results.

## Modify a Saved Coupon Search

To modify a saved coupon search:

1. From the **Pricing** menu, select **Find Coupon**. Alternatively, click the **Find Coupon** hyperlink in the home page.
2. The Basic Coupon Search screen is displayed. Click **Saved Searches** to view the list of saved coupon searches. Alternatively, click **Advanced Search** and click **Saved Searches**.

The saved coupon searches are displayed in a menu, with the favorite saved searches, if any, displayed at the top of the list.

**Note:** A maximum of eight saved searches are displayed in the menu.

3. Perform either of the following tasks:

- If the saved search is displayed in the menu, click the saved search to view the corresponding search screen.
  - If the saved search is not displayed in the menu, click **More Searches...** The Find Saved Searches for Coupons dialog box is displayed. In the **Saved Search Name Contains** box, enter either the complete or partial saved search name to filter the list of saved searches displayed in the **Saved Searches** panel. Double-click a saved search name to view the corresponding search screen. Alternatively, click a saved search name and click **Select** to view the corresponding search screen.  
**Note:** The **More Searches...** button is displayed only if there are more than eight saved coupon searches.
4. The Coupon Search screen is displayed with the search criteria filled in. Modify the appropriate information, and select **Create Saved Search** from the **Saved Searches** drop-down menu.
  5. The Save Search dialog box is displayed, with the name of the original saved search populated in the **Saved Search Name\*** box. Perform one of the following tasks:
    - To overwrite the original saved search, leave the name as is. The Confirm Overwrite dialog box, which contains a message asking you for confirmation about proceeding with the update of the original saved search, is displayed. Click **Yes**.
    - To save the search under a new name, enter a name for the search.
  6. Select the **Include in favorite searches** check box to include the saved search in the list of favorites.
  7. Click **Save**.

**Note:** \* indicates that the field is mandatory.

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## Copy a Coupon

A pricing organization user can create a new coupon from an existing coupon by copying it. When a user copies a coupon, all the conditions and effects defined in the original coupon are copied to the new coupon.

**Note:** The status of the new coupon created using the copying function will be set to **INACTIVE** even if the status of the coupon from which it is copied is **ACTIVE**.

To copy a coupon:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Coupon**. Alternatively, click the **Find Coupon** hyperlink in the home page.
3. The Basic Coupon Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. If there is only one coupon matching the search criteria, the Coupon Summary screen is displayed. Click the **Copy Price List** related task. If there are multiple coupons matching the search criteria, the list of coupons is displayed. Perform either of the following tasks:
  - Select the coupon you want to copy by selecting the corresponding check box, and click **Copy**.  
**Note:** You can copy only one coupon at a time.
  - Click the **Coupon ID** hyperlink or double-click the row corresponding to the coupon you want to copy. In the Coupon Summary screen, click the **Copy Coupon** related task.
5. The Copy Coupon dialog box is displayed. In the **New Coupon ID\*** box, enter a unique identifier for the new coupon.
6. Click **Create**.

The Coupon Summary screen pertaining to the new coupon is displayed.

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## Modify Coupon Details

A pricing organization user can modify the description of a coupon, the date range within which a coupon is effective, the status of a coupon, the conditions under which the coupon will become applicable, and the effects of the coupon if those conditions are met. An enterprise user can modify only the customer assignments of a coupon. If the pricing organization is an enterprise, the user can modify all the information pertaining to a coupon, including the assignment of the coupon to customers, and modifying the conditions and effects.



To modify the details of a coupon:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Coupon**. Alternatively, click the **Find Coupon** hyperlink in the home page.
3. The Basic Coupon Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The coupons matching the search criteria are displayed. Click the **Coupon ID** hyperlink or double-click the row corresponding to the coupon.

**Note:** If there is only one coupon matching the search criteria, the details of the corresponding coupon are automatically displayed.

5. The Coupon Summary screen is displayed. Modify the appropriate fields depending on whether you are an enterprise user or a pricing organization user.

As a pricing organization user, you can modify the following fields:

- **Coupon Description\*:** Modify the description of the coupon, as appropriate.
- **Effective Start Date\*:** Modify the start date and start time of the coupon by clicking the corresponding  icon and selecting the time from the drop-down list. The start date and start time indicate the date and time from which the coupon becomes effective.
- **Effective End Date\*:** Modify the end date and end time of the coupon by clicking the corresponding  icon and selecting the time from the drop-down list. The end date and end time indicate the date and time until which the coupon is effective.
- **This coupon can be combined with other coupons:** Select or clear this check box depending on whether or not you want to enable this coupon to be used with other coupons.
- **Apply even if the item price has been manually overridden:** Select or clear this check box depending on whether or not you want to apply the price adjustments even after the item's price has been manually overridden.

**Note:** This check box is displayed only if the coupon is a combination or item quantity coupon.



- **Apply results to the line and not to the order:** Select or clear this check box depending on whether or not you want to apply the coupon at the order line level and not the order level.

**Note:** This check box is displayed only if the coupon is an order total or ship order total coupon.

**Note:** \* indicates that the field is mandatory.

As a pricing organization user, you can perform the following tasks:

- [Modify the Status of a Coupon](#)
- [Delete a Coupon](#)
- [Modify the Conditions and Effects of a Coupon Based on the Combination of Items Ordered](#)
- [Modify the Conditions and Effects of a Coupon Based on Item Quantity](#)
- [Modify the Conditions and Effects of a Coupon Based on the Order Total](#)
- [Modify the Conditions and Effects of a Coupon Based on the Ship Order Total](#)
- [Copy a Coupon](#)

As an enterprise user, you can perform the following task:

- [Assign a Coupon to Customers](#)

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## Modify the Conditions and Effects of a Coupon Based on the Combination of Items Ordered


A pricing organization user can modify the conditions under which a combination coupon will be applicable and the effects of the coupon on the order price when the conditions are met.

To modify the conditions and effects of a coupon based on the combination of items ordered:



1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Coupon**. Alternatively, click the **Find Coupon** hyperlink in the home page.
3. The Basic Coupon Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The coupons matching the search criteria are displayed. Click the **Coupon ID** hyperlink or double-click the row corresponding to the coupon.  
**Note:** If there is only one coupon matching the search criteria, the details of the corresponding coupon are automatically displayed.
5. The Coupon Summary screen is displayed. Modify the information in the **Conditions** tab, as required.

The following table describes the fields in the **Conditions** tab of the Coupon Summary screen:

---

| Field  | Description   |
|--|---|
| IF An order is placed in <currency name or any> currency   | Select one of the following options: <ul style="list-style-type: none"><li>▪ From the drop-down list, select the currency used for the price of the items in the order, for example, <b>USD</b>, <b>Euro</b>, and so on.</li><li>▪ Select the <b>any</b> option if the currency used for the price of the items in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.<br/><b>Note:</b> If you select the <b>any</b> option, you can use the coupon to apply only a percentage discount and not an absolute discount on the order price.</li></ul>                                  |
| AND the order contains <any or all> of the following items | Select one of the following options: <ul style="list-style-type: none"><li>▪ <b>any:</b> One of the conditions under which the coupon will apply is that the order must contain at least one of the items you will specify in the Item ID fields.</li><li>▪ <b>all:</b> One of the conditions under which the coupon will apply is that the order must contain all the items you will specify in the Item ID fields.</li></ul>  |
| Item ID*   | Enter the identifier of the item that the order must contain for the coupon to apply.<br>Alternatively, click the  icon to search for the corresponding Item ID. The Basic Item Search screen is displayed. Enter the search criteria and click <b>Search</b> . Alternatively, click <b>Advanced Search</b> , enter the search criteria, and click <b>Search</b> . The items matching the search criteria are displayed. Select the item by clicking the corresponding <b>Item ID</b> hyperlink. Alternatively, select the corresponding check box and click <b>Select</b> . |

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| Field   | Description   |
|---|---|
| with a quantity of*   | Enter the minimum quantity of the item that the order must contain for the coupon to apply.   |
| Add Item  | <p>Click this to specify an additional item. A new row for specifying the item and the minimum quantity of the item is displayed. Enter the identifier of the item and the minimum quantity of the item.</p> <p>To delete an item, click the  icon corresponding to the item you want to delete.</p> <p><b>Note:</b> You cannot define a coupon by adding an Item ID multiple times.</p>   |
| THEN Apply  | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>an absolute discount:</b> Select this option to apply an absolute discount on the item if the specified conditions are met. <p><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</p> </li> <li>▪ <b>a percentage discount:</b> Select this option to apply a percentage discount on the item if the specified conditions are met.</li> </ul>   |
| of*   | Enter the amount to be discounted from the price. For example, if you enter an absolute discount of \$25, the amount of \$25 will be discounted from the price if the specified conditions are met.   |
| to the item*  | Click the  icon to search for the item to which the discount is to be applied. The Basic Item Search screen is displayed. Enter the search criteria and click <b>Search</b> . Alternatively, click <b>Advanced Search</b> , enter the search criteria, and click <b>Search</b> . The items matching the search criteria are displayed. Select the item by clicking the corresponding <b>Item ID</b> hyperlink. Alternatively, select the corresponding check box and click <b>Select</b> .   |
| each  | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>for one quantity on the order:</b> Select this option to apply the discount on a single unit of the items specified in the Item ID fields earlier.</li> <li>▪ <b>for every occurrence of the item on the order:</b> Select this option to apply the discount on all the units of the items specified in the Item ID fields earlier.</li> <li>▪ <b>once for each combination of items above:</b> Select this option to apply the discount on each combination of the items specified earlier. For example, if you specify that a customer will get a 15% discount on a printer if the customer buys two computers, the customer will get only a 15% discount on a printer even if the customer buys two computers and two printers. However, if the customer buys four computers and two printers, the customer will get a 15% discount on both the printers.</li> </ul> |
| For analytics and accounting purpose, the discount shall be collected against the charge name | From the drop-down list, select the charge name that is to be associated with the discount. The charge name is used to track the amount of discount that has been applied to an order.  |

## 6. Click **Submit**.

**Note:** \* indicates that the field is mandatory.

1.

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## Modify the Conditions and Effects of a Coupon Based on Item Quantity

A pricing organization user can modify the conditions under which an item quantity coupon will be applicable and the effects of the coupon on the order price when the conditions are met.


To modify the conditions and effects of a coupon based on item quantity:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Coupon**. Alternatively, click the **Find Coupon** hyperlink in the home page.
3. The Basic Coupon Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The coupons matching the search criteria are displayed. Click the **Coupon ID** hyperlink or double-click the row corresponding to the coupon.

**Note:** If there is only one coupon matching the search criteria, the details of the corresponding coupon are automatically displayed.

5. The Coupon Summary screen is displayed. Modify the information in the **Conditions** tab, as required.

The following table describes the fields in the **Conditions** tab of the Coupon Summary screen:

| Field  | Description   |
|--|---|
| IF An order is placed in <currency name or any> currency | Select one of the following options: <ul style="list-style-type: none"><li>▪ From the drop-down list, select the currency used in the order, for example, <b>USD</b>, <b>Euro</b>, and so on.</li><li>▪ Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.</li></ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the coupon to apply only a percentage discount and not an absolute discount on the order price.</p> |
| AND IF the order contains the item*                      | Click the  icon to search for the Item ID of the item contained in the order. One of the conditions under which the coupon will apply is that the order must contain the item with the Item ID you specify.  |
| AND IF the quantity of the item is greater than*         | Enter the minimum quantity of the item that the order must contain for the coupon to apply. For example, if you enter 200, one of the conditions under which the coupon will apply is that the quantity of the items with the specified attributes or Item IDs in the order must be greater than 200.   |

| Field   | Description   |
|---|---|
| THEN apply  | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>an absolute discount:</b> Select this option to apply an absolute discount on the item if the specified conditions are met.</li> </ul> <p><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</p> <ul style="list-style-type: none"> <li>▪ <b>a percentage discount:</b> Select this option to apply a percentage discount on the item if the specified conditions are met.</li> </ul> |
| of*   | <p>Enter the amount to be discounted from the price. For example, if you enter an absolute discount of \$25, the amount of \$25 will be discounted from the price if the specified conditions are met.</p>  |
| Apply to  | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>a single occurrence:</b> Select this option to apply the discount on a single unit of the item.</li> <li>▪ <b>all occurrences:</b> Select this option to apply the discount on all the units of the item.</li> </ul>  |
| For analytics and accounting purpose, the discount shall be collected against the charge name | <p>From the drop-down list, select the charge name that is to be associated with the discount. The charge name is used to track the amount of discount that has been applied to an order.</p>   |

6. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition to an item quantity coupon:

1. In the Coupon Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for an item quantity coupon, under the **Conditions** tab of the Coupon Summary screen, click the  icon corresponding to the condition you want to delete. The condition is no longer displayed.

**Note:** The  icon is displayed only if multiple conditions are defined.

## Modify the Conditions and Effects of a Coupon Based on the Order Total

A pricing organization user can modify the conditions under which an order total coupon will be applicable and the effects of the coupon on the order price when the conditions are met.

To modify the conditions and effects of a coupon based on the order total:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Coupon**. Alternatively, click the **Find Coupon** hyperlink in the home page.
3. The Basic Coupon Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The coupons matching the search criteria are displayed. Click the **Coupon ID** hyperlink or double-click the row corresponding to the coupon.

**Note:** If there is only one coupon matching the search criteria, the details of the corresponding coupon are automatically displayed.

5. The Coupon Summary screen is displayed. Modify the information in the **Conditions** tab, as required.

The following table describes the fields in the **Conditions** tab of the Coupon Summary screen:

| Field  | Description   |
|--|---|
| IF An order is placed in <currency name or any> currency | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ From the drop-down list, select the currency used in the order, for example, <b>USD</b>, <b>Euro</b>, and so on.</li> <li>▪ Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.</li> </ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the coupon to apply only a percentage discount and not an absolute discount on the order price.</p> |
| AND IF the order total is greater than*                  | <p>Enter the appropriate amount. For example, if you enter 1000, one of the conditions under which the coupon will apply is that the order total of the order must be greater than \$1,000 if USD is the currency you specified.</p>  |
| THEN apply   | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>An absolute discount:</b> Select this option to apply an absolute discount on the order total if the specified conditions are met.</li> </ul> <p><b>Note:</b> This option is disabled if the currency used for the price of the items in the order can be any currency.</p> <ul style="list-style-type: none"> <li>▪ <b>A percentage discount:</b> Select this option to apply a percentage discount on the order total if the specified conditions are met.</li> </ul>                       |
| of*  | <p>Enter the amount to be discounted from the order total. For example, if you enter an absolute discount of \$100, the amount of \$100 will be discounted from the order total if the specified conditions are met.</p>  |

---

| Field   | Description  |
|---|--|
| For analytics and accounting purpose, the discount shall be collected against the charge name | From the drop-down list, select the charge name that is to be associated with the discount. The charge name is used to track the amount of discount that has been applied to an order. |

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6. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition to an order total coupon:

1. In the Coupon Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for an order total coupon, under the **Conditions** tab of the Coupon Summary screen, click the  icon corresponding to the condition you want to delete. The condition is no longer displayed.

**Note:** The  icon is displayed only if multiple conditions are defined.

## Modify the Conditions and Effects of a Coupon Based on the Ship Order Total

A pricing organization user can modify the conditions under which a ship order total coupon will be applicable and the effects of the coupon on the order price when the conditions are met.

To modify the conditions and effects of a coupon based on the ship order total:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Coupon**. Alternatively, click the **Find Coupon** hyperlink in the home page.
3. The Basic Coupon Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The coupons matching the search criteria are displayed. Click the **Coupon ID** hyperlink or double-click the row corresponding to the coupon.

**Note:** If there is only one coupon matching the search criteria, the details of the corresponding coupon are automatically displayed.

5. The Coupon Summary screen is displayed. Modify the information in the **Conditions** tab, as required.

The following table describes the fields in the **Conditions** tab of the Coupon Summary screen:

| Field  | Description  |
|--|--|
| IF An order is placed in <currency name or any> currency | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ From the drop-down list, select the currency used in the order. For example, if you select <b>USD</b>, one of the conditions under which the coupon will apply is that the currency used for the price of the items in the order must be USD.</li> <li>▪ Select the <b>any</b> option if the currency used in the order can be any currency. This option is not displayed if there is only one currency defined for the pricing organization.</li> </ul> <p><b>Note:</b> If you select the <b>any</b> option, you can use the coupon to apply only a percentage discount and not an absolute discount on the order price.</p> |
| AND IF the order <ships completely or ships separately>  | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>ships completely:</b> Select this option to apply the coupon on orders for which the shipping preference is that the items in the order are shipped in as few shipments as possible.</li> <li>▪ <b>ships separately:</b> Select this option to apply the coupon on orders for which the shipping preference is that the items in the order are shipped as and when they become available.</li> </ul>   |
| via <carrier service name>                               | <p>From the drop-down list, select the carrier service used to ship the order. For example, if you select Express Overnight as the carrier, one of the conditions under which the coupon will apply is that the carrier used to ship the order must be Express Overnight.</p>  |
| AND IF the order total is greater than*                  | <p>Enter the appropriate amount. For example, if you enter 1000, one of the conditions under which the coupon will apply is that the order total of the order must be greater than \$1,000 if USD is the currency you specified.</p>   |



| Field   | Description  |
|---|--|
| THEN apply  | <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>▪ <b>An absolute discount:</b> Select this option to apply an absolute discount on the shipping charges if the specified conditions are met.</li> <li>▪ <b>A percentage discount:</b> Select this option to apply a percentage discount on the shipping charges if the specified conditions are met.</li> <li>▪ <b>A maximum shipping charge:</b> Select this option to apply the maximum shipping charge if the specified conditions are met. The maximum shipping charge is a flat fee which, when applied, will replace the current shipping charges for the order.</li> </ul> |
| of*   | Enter the amount to be either discounted from the shipping charges. For example, if you enter an absolute discount of \$100, the amount of \$100 will be discounted from the shipping charges if the specified conditions are met.   |
| For analytics and accounting purpose, the discount shall be collected against the charge name | From the drop-down list, select the charge name that is to be associated with the discount. The charge name is used to track the amount of discount that has been applied to an order.   |

6. Click **Submit**.


**Note:** \* indicates that the field is mandatory.


## Add a New Condition

To add a new condition to a ship order total coupon:

1. In the Coupon Summary screen, under the **Conditions** tab, click **Add Condition**.
2. A new row for specifying the condition is displayed. Enter the appropriate information and continue defining the conditions and effects.

## Delete a Condition

To delete a condition for a ship order total coupon, under the **Conditions** tab of the Coupon Summary screen, click the  icon corresponding to the condition you want to delete. The condition is no longer displayed.

**Note:** The  icon is displayed only if multiple conditions are defined.

---

## Modify the Status of a Coupon

A coupon can be in either **Active** status or **Inactive** status. A coupon can affect the order price only if the coupon is active. A pricing organization user can assign an inactive coupon to a customer, but that coupon will have no effect on the price adjustments made to the order until it is activated.

A pricing organization user can change the status of a coupon to activate or deactivate the coupon.

To modify the status of a coupon:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Coupon**. Alternatively, click the **Find Coupon** hyperlink in the home page.
3. The Basic Coupon Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The coupons matching the search criteria are displayed. Click the **Coupon ID** hyperlink or double-click the row corresponding to the coupon.  
**Note:** If there is only one coupon matching the search criteria, the details of the corresponding coupon are automatically displayed.
5. The Coupon Summary screen is displayed. Perform either of the following tasks:
  - If the status of the coupon is **INACTIVE**, click **Activate** to activate the coupon.
  - If the status of the coupon is **ACTIVE**, click **Deactivate** to deactivate the coupon.
6. Click **Save**.

---

## Delete a Coupon

A pricing organization user can delete a coupon if that coupon no longer serves a purpose.

To delete a coupon:

1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Find Coupon**. Alternatively, click the **Find Coupon** hyperlink in the home page.
3. The Basic Coupon Search screen is displayed. Enter the search criteria and click **Search** to perform a basic search. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search** to perform an advanced search.
4. The coupons matching the search criteria are displayed. Click the **Coupon ID** hyperlink or double-click the row corresponding to the coupon.

**Note:** If there is only one coupon matching the search criteria, the details of the corresponding coupon are automatically displayed.

5. The Coupon Summary screen is displayed. Click **Delete**.

The coupon is deleted and the home page is displayed.

**Notes:**

- The **Delete** button is enabled only if the status of the coupon is **Inactive**.
- To delete a coupon that is assigned to a customer, you must first remove the customer assignments.

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## Manage Saved Searches

A user can save a search to avoid the task of entering the search criteria every time the user wants to search for a particular entity, such as a price list, pricing rule, or a coupon.

A user can manage the saved searches by performing the following tasks:

- Rename a saved search
- Delete a saved search
- View and Execute a Saved Search
- Mark a saved search as a favorite

### Rename a Saved Search

You can search for a saved search and rename it.

To rename a saved search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Favorites** menu, select **Manage Saved Searches**. Alternatively, if you are on the Basic Search or Advanced Search screen, select **Manage Saved Searches** from the **Saved Searches** drop-down menu.
3. The Saved Search Management dialog box is displayed. In the **Find Saved Searches** panel, perform the following tasks:
  - a. In the **Saved Search Name Contains** box, enter either the complete name or partial name of the saved search.
  - b. From the **Search Type** drop-down list, select the appropriate entity. For example, to search for a saved price list search, select price list from the drop-down list.

**Note:** If you navigated to the Saved Search Management dialog box by selecting **Manage Saved Searches** from the **Saved Searches** drop-down menu, the entity is already displayed in this field. You can either use this entity or select the appropriate entity from the drop-down list.
  - c. Click **Search**.
4. The saved searches matching the criteria are displayed in the **Saved Searches** panel. Select the check box corresponding to the saved search you want to rename, and enter a new name in the **Saved Search Name** column.
5. Click **Save**.

### Delete a Saved Search

You can search for a saved search and delete it.

To delete a saved search:


1. Log in to Sterling Business Center as an administrator.

2. From the **Favorites** menu, select **Manage Saved Searches**. Alternatively, if you are on the Basic Search or Advanced Search screen, select **Manage Saved Searches** from the **Saved Searches** drop-down menu.
3. The Saved Search Management dialog box is displayed. In the **Find Saved Searches** panel, perform the following tasks:
  - a. In the **Saved Search Name Contains** box, enter either the complete or partial name of the saved search.
  - b. From the **Search Type** drop-down list, select the appropriate entity.  
**Note:** If you navigated to the Saved Search Management dialog box by selecting **Manage Saved Searches** from the **Saved Searches** drop-down menu, the entity is already displayed in this field. You can either use this entity or select the appropriate entity from the drop-down list.
  - c. Click **Search**.
4. The saved searches matching the criteria are displayed in the **Saved Searches** panel. Select the check box corresponding to the saved search you want to delete, and click **Delete**.

## View and Execute a Saved Search

You can search for a saved search and then view and execute it.

To view and execute a saved search:



1. Log in to Sterling Business Center as an administrator.
2. From the **Favorites** menu, select **Manage Saved Searches**. Alternatively, if you are on the Basic Search or Advanced Search screen, select **Manage Saved Searches** from the **Saved Searches** drop-down menu.
3. The Saved Search Management dialog box is displayed. In the **Find Saved Searches** panel, perform the following tasks:
  - a. In the **Saved Search Name Contains** box, enter either the complete or partial name of the saved search.
  - b. From the **Search Type** drop-down list, select the appropriate entity.  
**Note:** If you navigated to the Saved Search Management dialog box by selecting **Manage Saved Searches** from the **Saved Searches** drop-down menu, the entity is already displayed in this field. You can either use this entity or select the appropriate entity from the drop-down list.
  - c. Click **Search**.
4. The saved searches matching the criteria are displayed in the **Saved Searches** panel. Select the check box corresponding to the saved search you want to view and execute, and click .  
The search screen is displayed with the search criteria filled in along with the search results.

## Mark a Saved Search as a Favorite

You can mark a saved search as a favorite to quickly navigate to a saved search that you frequently use.

To mark a saved search as a favorite:

1. Log in to Sterling Business Center as an administrator.
2. From the **Favorites** menu, select **Manage Saved Searches**. Alternatively, if you are on the Basic Search or Advanced Search screen, select **Manage Saved Searches** from the **Saved Searches** drop-down menu.
3. The Saved Search Management dialog box is displayed. In the **Find Saved Searches** panel, search for the appropriate saved search by performing the following tasks:
  - a. In the **Saved Search Name Contains** box, enter either the complete or partial saved search name.
  - b. From the **Search Type** drop-down list, select the appropriate entity.


**Note:** If you navigated to the Saved Search Management dialog box by selecting **Manage Saved Searches** from the **Saved Searches** drop-down menu, the entity is already displayed in this field. You can either use this entity or select the appropriate entity from the drop-down list.
  - c. Click **Search**.
4. The saved searches matching the criteria are displayed in the **Saved Searches** panel. Perform either of the following actions:
  - To mark a saved search as a favorite, click the  icon corresponding to the saved search.
  - To remove the favorite mark from a saved search, click the  icon corresponding to the saved search.
5. Click **Save**.

---

## Test Pricing Setup

After configuring the price lists, pricing rules, and coupons, you can test the price of the items added to an order on a particular date and time. You can also test the order price by selecting the coupons to be applied to the order.

To test the order price:


1. Log in to Sterling Business Center as an administrator.
2. From the **Pricing** menu, select **Test Pricing**.
3. The Test Pricing screen is displayed. In the **Select Customer or Specify Customer Attributes** area, select one of the following options to specify the customer for whom you want to test the price of items:
  - Select the **Anonymous Customer** option to test the price of items for an anonymous customer. An anonymous customer is a customer who can add items to the cart without logging in to the Sterling Web application.
  - Select the **Specific Business Customer** option to test the price of items for a specific business customer. To search for a business customer, click the  icon. The Customer Search dialog box is displayed. Enter the search criteria and click **Search**. The search results matching the search criteria are displayed in the **Customer List** panel. To select a customer, select the corresponding check box and click **Select**. To select multiple customers, select the corresponding check boxes and click **Select**.
  - Select the **Enter Customer Attributes** option and specify the attributes of the customer.




The following table describes the fields in the **Customer Attributes** area of the Test Pricing screen:

---

| Field             | Description   |
|-------------------|---|
| Customer Type     | Select one of the following options: <ul style="list-style-type: none"><li>▪ <b>All</b>: Select this option to test the price of all types of customers who fulfill the criteria you specify.</li><li>▪ <b>Business</b>: Select this option to test the price of all business customers who fulfill the criteria you specify.</li><li>▪ <b>Consumer</b>: Select this option to test the price of all consumer customers who fulfill the criteria you specify.</li></ul> |
| Relationship Type | From the drop-down list, select the relationship type the customer has with the enterprise, for example, <b>Reseller</b> , <b>Retailer</b> , <b>Distributor</b> , and so on.  |

---

| Field                           | Description   |
|---------------------------------|---|
| Region Or City, State, Zip Code | <p>Click the  icon adjacent the <b>Region</b> box to search for the region to which the customer belongs. The Regions dialog box is displayed. Select the appropriate region. Alternatively, perform the following tasks:</p> <ul style="list-style-type: none"> <li>▪ In the <b>City</b> box, enter the name of the city to which the customer belongs.</li> <li>▪ In the <b>State</b> box, enter the name of the state to which the customer belongs.</li> <li>▪ In the <b>Zip Code</b> box, enter the zip code of the city to which the customer belongs.</li> </ul> <p><b>Note:</b> The value of the <b>Region</b> field takes precedence over the values of the <b>City</b>, <b>State</b>, and <b>Zip Code</b> fields. Therefore, if you select a region and provide the city, state, and zip code information, only the region will be considered while testing the order price.</p> |
| Membership Level                | From the drop-down list, select the level of the customer, for example, <b>Gold</b> , <b>Silver</b> , <b>Platinum</b> , and so on.  |
| Vertical                        | From the drop-down list, select the customer's vertical market, for example, <b>Education</b> , <b>Government</b> , and so on.  |

4. In the **Select Items and Specify Quantity** area, add the items whose prices you want to test and the quantity of the items:
  - a. Click the  icon adjacent the **Select Item** box to search for an item.
  - b. The Item Search screen is displayed. In the **Basic Item Search** panel, enter the search criteria and click **Search**. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search**.
  - c. The items matching the search criteria are displayed. To select an item, select the corresponding check box and click **Select**. To select multiple items, select the corresponding check boxes and click **Select**.
  - d. In the **Enter Quantity** box, enter the appropriate quantity of the item.
5. In the **Select Coupons** area, add the coupons that you want to apply on the order.
  - a. Click the  icon adjacent the Select Coupon box to search for a coupon.
  - b. The Coupon Search screen is displayed. In the **Basic Coupon Search** panel, enter the search criteria and click **Search**. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search**.
  - c. The coupons matching the search criteria are displayed. To select a coupon, select the corresponding check box and click **Select**. To select multiple coupons, select the corresponding check boxes and click **Select**.
6. In the **Select Order Attributes** area, perform the following tasks:
  - a. In the **Date\***, select the date and time at which you want to test the price of an item. Select the date by clicking the  icon, and select the time from the drop-down list. (By default, the current date and current time are displayed.)
  - b. From the **Currency\*** drop-down list, select the currency that is to be used to test the price of an item. By default, the currency that has been defined for your organization is displayed.



## 7. Click **Show Price**.


The **Pricing Results** panel is displayed. You can view the following information in the **Pricing Results** panel:

- **Items:** You can view information about the items whose prices you are testing. You can view the identifier of an item, description, quantity, base price, and line total. Base price is the unit price of the item used for pricing, and line total is the price for the order line that is calculated based on the order line quantity and pricing rules or coupons applied to the order line, if any. For example, if a customer orders five numbers of an item whose list price is \$10, and adds a coupon for which a customer gets a discount of \$20 if the customer orders more than five numbers of that item, the line total will be \$30.
- **Line Charges/Discount Breakup:** You can view information about a selected order line. You can view the price list that has been used for item pricing, line total, the identifiers of the pricing rules or coupons applied to the order line, and any adjustments made to the price for the order line resulting from the pricing rules or coupons.
- **Coupons which were not applied:** If there is any coupon that cannot be applied to the order, you can view the identifier of the coupon and a brief description about why the coupon cannot be applied to the order.
- **Header Details:** You can view the order line total, the order total, the identifiers of the pricing rules or coupons applied to the order, and the price adjustments made to the order price resulting from pricing rules or coupons.


## Add Items When Testing the Pricing Setup

You can add more items to test the final price of those items.

To add a new item:

1. In the Test Pricing Screen, in the **Select Items and Specify Quantity** area, click **Add More Items**.
2. A new row for adding the item and the quantity of the item is displayed. Search for the corresponding item by clicking the  icon.
3. The Item Search screen is displayed. In the **Basic Item Search** panel, enter the search criteria and click **Search**. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search**.
4. The items matching the search criteria are displayed. To select an item, select the corresponding check box and click **Select**. To select multiple items, select the corresponding check boxes and click **Select**.
5. In the **Enter Quantity** box, enter the appropriate quantity of the item.


## Remove an Item

To remove an item whose price you do not want to test, in the **Select Items and Specify Quantity** area of the Test Pricing screen, click the  icon corresponding to the item you want to remove. The row containing the item and the quantity of the item is deleted.


## Add a Coupon

You can add coupons to adjust the price of items and test the final price of the items.

To add a new coupon:

1. In the Test Pricing screen, in the **Select Coupons** area, click **Add More Coupons**.
2. A new row for adding the coupon is displayed. Search for the corresponding coupon by clicking the  icon.
3. The Coupon Search screen is displayed. In the **Basic Coupon Search** panel, enter the search criteria and click **Search**. Alternatively, click **Advanced Search**, enter the search criteria, and click **Search**.
4. The coupons matching the search criteria are displayed. To select a coupon, select the corresponding check box and click **Select**. To select multiple coupons, select the corresponding check boxes and click **Select**.

## Remove a Coupon

To remove a coupon that you do not want to use while testing the price of the items, in the **Select Coupons** area of the Test Pricing screen, click the  icon corresponding to the coupon you want to remove. The coupon is deleted.

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