

TIBCO® Fulfillment Catalog - Offer and Price Designer User's Guide

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TIBCO Documentation and Support Services

Documentation for this and other TIBCO products is available on the TIBCO Documentation site. This site is updated more frequently than any documentation that might be included with the product. To ensure that you are accessing the latest available help topics, visit:

<https://docs.tibco.com>

Product-Specific Documentation

The following documents for this product can be found on the TIBCO Documentation site:

- *TIBCO Fulfillment Catalog Installation Guide*
- *TIBCO Fulfillment Catalog Product Catalog Guide*
- *TIBCO Fulfillment Catalog User's Guide*
- *TIBCO Fulfillment Catalog Web Services Guide*
- *TIBCO Fulfillment Catalog Offer and Price Designer User's Guide*
- *TIBCO Fulfillment Catalog Release Notes*

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- For an overview of TIBCO Support, and information about getting started with TIBCO Support, visit this site:

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- If you already have a valid maintenance or support contract, visit this site:

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Entry to this site requires a user name and password. If you do not have a user name, you can request one.

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<https://community.tibco.com>

Offer and Price Designer Overview

The Offer & Price Designer is designed to be a separate component of Fulfillment Catalog.

Although the Fulfillment Catalog system is a robust system that can perform all catalog related functions, it is still very technical and it is suitable for technical users who define low level records and fulfillment details.

The Offer and Price Designer component eliminates this complexity with an intuitive user interface and a simplified workflow. Business users can use the Offer and Price Designer for business oriented view of the data, and also use it on a daily basis for offer creation activities.

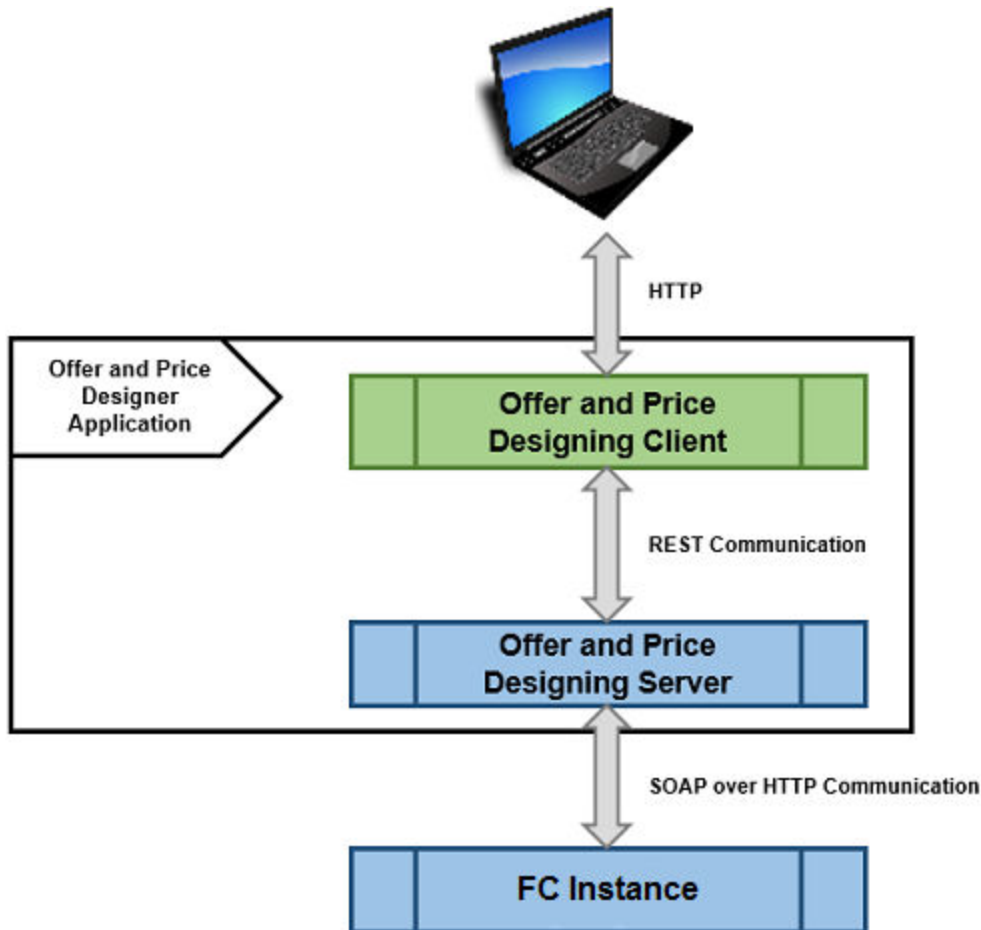
The benefits of Offer & Price Designer are as follows:

- Business users can define, browse, and interact with customer oriented products, thereby hiding the complexity of the low level technical catalog.
- Business users can perform the following operations related to Offers:
 - Browsing, searching, and filtering offers
 - Creating and modifying offers
 - Modifying offer segments like `CompatibleSegment` and `IncompatibleSegment`
 - Modifying `ProductRequiredFor`, `IncompatibleProduct`, and autoprovisioning product of an offer
 - Modifying and browsing offer hierarchy parameters like `ProductComprisedOf`
 - Modifying Offer price including price characteristics, segments and `ProductRequiresGroup`
 - Modifying Offer discount, which includes discount, characteristics, segments and `ProductRequiresGroup`
- Reduction in user clicks or wait time required to perform catalog tasks.

Architecture of Offer and Price Designer

The architecture of Offer and Price Designer is as follows:

Architecture of Offer and Price Designer



The Offer and Price Designer application is comprised of two parts:

- A client part, which serves as a browser based front end. The client role is to provide a superior user experience to the user.
- A server part, which communicates with the Fulfillment Catalog instance using SOAP over HTTP and providing the client part with a REST API. The server role is to aggregate and process data back and forth between the client user interface, and the Fulfillment Catalog instance.

The application does not use a database as it relies only on the data that persists in the Fulfillment Catalog instance.

Offer and Price Designer Security and Credentials

The Offer and Price Designer configuration contains the address of the instance of Fulfillment Catalog. The client user interface requests for credentials. The required credentials are Fulfillment Catalog credentials and are sent directly to Fulfillment Catalog to open a session, and also verify if the concerned user has the rights to create offers and perform all Offer and Price Designer operations.

Once logged in, the server returns a JWT token to the client UI for further communications. The token contains the session token from Fulfillment Catalog, which will be used in subsequent communication with the Fulfillment Catalog system.

Relationships Handled by Offer and Price Designer

The relationships of Fulfillment Catalog handled by the Offer and Price Designer are as follows:

Relationships of Fulfillment Catalog Handled by the Offer and Price Designer

Source	Target	Relationship Name
PRODUCT	PRODUCT	ProductComprisedOf
PRODUCT	PRODUCT	IncompatibleProduct / ProductRequiredFor
PRODUCT	SEGMENT	CompatibleSegment / IncompatibleSegment
PRODUCT	CHARACTERISTIC	Characteristic
PRODUCT	PRICE	ProductPricedBy
PRICE	DISCOUNT	PriceAlteredByDiscount
PRICE	SEGMENT	PriceRequiresSegment
PRICE	PRICE	PriceComprisedOf
PRICE	CHARACTERISTIC	PriceRequiresCharacteristic
PRICE	REQUIRES_PRODUCT	PriceRequiresProductGroup
DISCOUNT	SEGMENT	DiscountRequiresSegment
DISCOUNT	CHARACTERISTIC	DiscountRequiresCharacteristic
DISCOUNT	REQUIRES_PRODUCT	DiscountRequiresProductGroup
REQUIRES_PRODUCT	PRODUCT	ProductRequiredByGroup

Creating Users for Offer and Price Designer

A user can only access Offer and Price Designer if the user is assigned the role of Offer Designer in the Fulfillment Catalog enterprise. Only the user having the administrator role in the Fulfillment Catalog enterprise can create users who can access the Offer and Price Designer system.


The user having an administrator role only approves the offer using the Fulfillment Catalog enterprise. The user with the administrator role cannot access the Offer and Price Designer system. The user with the Offer Designer role can access the Offer and Price Designer system to create offers.

Prerequisites

To perform the following steps it is mandatory that the user has administrator role in the Fulfillment Catalog enterprise:

Procedure

1. Access the Fulfillment Catalog system and login using administrator credentials.
2. Click **Administration > User Accounts**.
The User Accounts page opens.
3. Click **Create**.
The Add User page opens.
4. Provide values for the following fields:

Fields	Description
User Name	Enter an appropriate user name. This will be used for logging in to Offer and Price Designer.
First Name	Enter the first name of the user.
Middle Name	Enter the middle name of the user.
Last Name	Enter the last name of the user.
Password	Enter a temporary password for the user.
Re-enter Password	Re-enter the temporary password for the user.
5. In the **Roles** panel, highlight the **Offer Designer** option from the **Available Roles** list and click the  button.
The action performed will add **Offer Designer** role in the **Selected Roles** list.
6. Click the **Save** button.
The new user is created and the user can access and use the *Offer and Price Designer* system.

Logging in to Offer and Price Designer

The login name format will be username@enterprisename. Contact the admin for your username and password.

Procedure

1. Open a browser and access the following URL format: http://host:port/opdesigner to launch Offer and Price Designer:
The login page of the Offer and Price Designer is displayed.
2. Enter the **Login** name.
3. Enter the **Password**.
4. Click the **Login** button.
Upon successful login you can access the *Offer and Price Designer* system.

Offer and Price Designer User Interface Overview








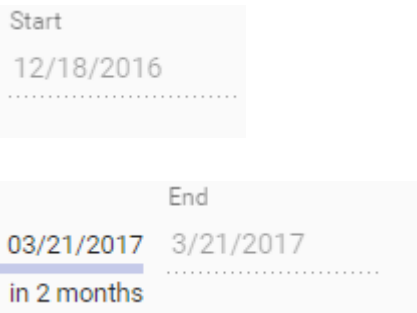
The Homepage

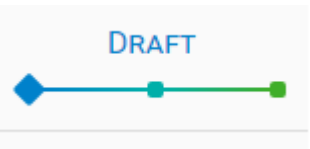

The Offer and Price Designer has a simple and intuitive user interface. The homepage is a clutter-free layout. You can perform all the operations related to Offers from the homepage itself.

The homepage contains access to all the operations that can be performed on Offers.

User Interface Components

The following table lists the user interface components and their description:

Icon/Element	Description
	To add a new offer.
	To create the clone of an existing offer.
	To view the hierarchy graph of the offer.
	To delete an offer.
	To search an offer or to filter the results.
	To sort the offer list in ascending or descending order based on the field. Currently offers can be sorted based on their Name or Type . The blue arrow indicates the field on which the offer is sorted.
	Selection boxes. You can only select one.
	Shows the time line of the offer from the start of the offer to the end of the offer.

Icon/Element	Description
	<p>Shows the status of the offer. The status can be:</p> <ul style="list-style-type: none">• Draft• Pending Approval• Active
	<p>Toggle button that either activates or deactivates the Single Use function.</p>

Viewing Details About Offer and Price Designer

The details about Offer and Price Designer can be viewed by using the About feature. The following details can be viewed:

- The URL of the server
- The current user logged in
- The default currency used
- The statuses that an offer can be assigned
- The sub types of an offer
- The format of the date

To view details about the Offer and Price Designer, perform the following steps:

Procedure

1. Click the **Profile** dropdown menu.
2. Click **About**.
The dialog box containing details about Offer and Price Designer.

Refreshing the Cache

Since Offer and Price Designer is linked to the server that stores the data of Fulfillment Catalog, it is necessary to ensure that the data is synchronized between the two applications. By refreshing the cache you synchronize the data between the two applications. To refresh the cache, perform the following steps:

Procedure

1. Click the **Profile** dropdown menu.

2. Click **Refresh cache**.

The data will be synchronized between Offer and Price Designer and Fulfillment Catalog.



If you cannot view the new records, added using the Fulfillment Catalog system (like offers, characteristics, segments, etc), or the change in status of offers, validated from the Fulfillment Catalog system, you should refresh the cache.

Viewing Offer and Price Designer Statistics

The **Statistics** feature can be used to view all the statistics related to the usage of the Offer and Price Designer. To view the Offer and Price Designer statistics, perform the following statistics:

Procedure

1. Click the **Profile** dropdown menu.
2. Click **Statistics**.
The dialog box containing all the statistics about Offer and Price Designer.

Logging out of Offer and Price Designer

To log out from Offer and Price Designer, perform the following steps:

Procedure

1. Click the **Profile** dropdown menu.
2. Click **Logout**.
Your session in the *Offer and Price Designer* system will be terminated.


Offers

The following topics will be covered in this section:

- [Creating an Offer](#)
- [Searching an Offer](#)
- [Using Filters to Search an Offer](#)
- [Cloning an Existing Offer](#)
- [Modifying an Existing Offer](#)
- [Deleting an Offer](#)

Creating an Offer

Procedure

1. Click the  icon in the homepage. The New Offer - Details page opens.

2. Enter the following details:

Field	Description
Offer id	A unique ID to identify the offer.
Name	A name for the offer
Short description	A short description for the offer. The short description will be displayed in the offer list.
Long description	A summary about the offer.


3. Select the **Type** of offer. The options are:

Field	Description
PO	Individual Product Offers
BPO	Bundled Product Offers

4. Select the **SubType** of the offer:

Field	Description
Device	Any device
Internet	Internet service
TV	TV service

5. Use the toggle button for the **Offer only once for Customer** field if you want to provide the offer only once for the customer. By default the toggle is off and the offer will be offered multiple times to the customer.
6. Enter the **Start** date and the **End** date to indicate the start date or time and the end date or time of the offer.

7.  In this step, if you click the **Submit** button the offer will be sent for approval. If you do not wish to send the offer for approval you can browse to another menu or page and the offer will be saved with the **Draft** status.
 Click the **Submit** button.
 A dialog box displayed with a request for approval.
8. Click the **Submit** button.
 The offer will be created and sent for approval.

The Offer Life Cycle

An offer passes through different stages in its life cycle.

The three stages or three status of an offer are as follows:

- **Draft-**

Since an offer has many components it might be possible that we may forget to save them periodically to retain the values. Offer and Price Designer ensures that an offer is automatically saved in **Draft** state without the user intervention. At this state of the offer, you can make as many edits as possible and all edits get saved automatically.

- **Pending Approval-**

To change the state of the offer to **Pending Approval**, you have to submit the offer. You cannot modify an offer at this state. Only the administrator can approve the offer. See the topic, [Approving an Offer for Activation](#), for more details.

- **Active-**

Once the administrator approves the offer from the Fulfillment Catalog system, the status of the offer changes to **Active**. In this state the offer is active and ready for fulfillment. You can modify an offer at this state.

Approving an Offer for Activation

Only a user with administrator role can approve an offer for its activation.

To approve an offer for its activation, perform the following steps:

Procedure

1. Access the Fulfillment Catalog system and login using administrator credentials.
2. Click the **Inbox** menu.
 The Inbox page opens.
3. Choose the offer you want to activate and click the relevant offer from the **Work Item** column.
 The Record Modify page opens.
4. If you want to view details of the record click the **View** link.
 The View Record page opens. You can view all the details of the record for confirmation purposes.
5. Click the **OK** button to close the View Record page upon confirmation.
 The control passes back to the Record Modify page.
6. Add your comments, if necessary, in the **Comments** text area.
7. Click the **Submit** button.
 The offer will be approved and its status will change to **Active**.

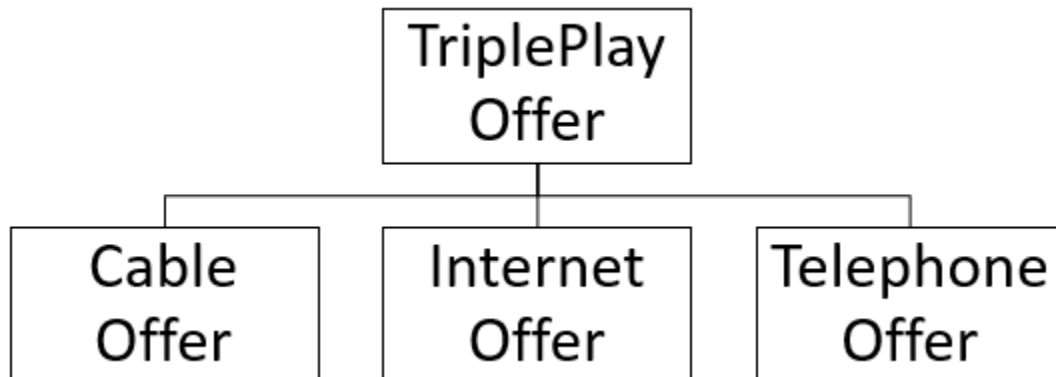
Use Case 1: Activating a Simple Offer

In this case if you create a simple offer, activating the offer will be as follows:



Use Case 2: Activating a Bundled Offer

Let us consider the following offers, which are structured, as shown in the following diagram:



The parent offer named TriplePlay Offer has three child offers:

- Cable Offer
- Internet Offer
- Telephone Offer

Scenario 1:

If the parent offer (TriplePlay Offer) and the child offers (Cable Offer, Internet Offer, and Telephone Offer) are all in **Draft** state, activating the parent offer does not automatically activate all the child offers. The child offers will remain in **Draft** state. To activate the child offers you will have to submit all child offers, individually.

Scenario 2:

When creating a bundled offer, if the parent offer (TriplePlay Offer) is in **Draft** state, you can assign child offers (Cable Offer, Internet Offer, and Telephone Offer), which are in **Active** state.

Graph View of the Offers

The Graph View displays a hierarchical representation of the offer.

You can use the graph view to make modifications to the offer using drag and drop and other UI extensive elements.

To access the graph view of the offer, click the  icon.

Using Graph View to Add Products to an Offer

To add products to an offer using the graph view, perform the following steps:

Prerequisites

See the topic [Creating an Offer](#), to learn how to create an offer and see the topic [Searching an Offer](#), to search for an offer.

Procedure

1. Click the offer for which you want to add products.

2. Click the  icon.

3. Click the  icon.


4. Click the + sign in the offer box.
A child will be added to the node.

5. Place the cursor in the **Add a product** text box.
A dynamic drop-down box will be displayed with the list of products.

6. Select a product to be added.
The selected product will be displayed beneath the **Add a product** text box.

7. Drag the added product to the child node.
The product gets added.

8. Repeat Step 4 through Step 7 to add more products, if needed.

9. Click the  icon to save the changes or click the **Submit** button to change the status of the offer to **Pending Approval**.

Components of an Offer

An offer creation is considered as complete when values for its individual components are set. It is not mandatory to provide values for all the components. The components of an offer are as follows:

- Products
- Rules
- Characteristics
- Segments
- Pricing

Viewing the Products of an Offer

See the topic, [Using Graph View to Add Products to an Offer](#), to know how to add products to an offer. To view the products in an offer, perform the following steps:


Procedure

1. Click **Products**.
The products page opens.
2. If the offer has some products added to it, the list of products will be displayed. If the offer has no products added to it, the list of products won't be displayed.

Adding Rules to an Offer

To add rules to an offer perform the following steps:

Procedure

1. Click **Rules**.
The rules page opens.
2. Set the rules by clicking the following tabs:
 - a) **REQUIRED** - Use the tab to add products that are required or mandatory to form the offer.
 - b) **INCOMPATIBLE** - Use the tab to add products that are not compatible to form an offer.
 - c) **AUTOPROVISIONED** - Use the tab to add products that are automatically provisioned.
3. Click any one of the tabs and click the  icon.
4. Select the required value for one or all of the following fields:
 - a) **Type**
 - b) **Subtype**
 - c) **Status**
5. Place the cursor on the **Add a product** text box and select a product that is displayed in the dynamic drop-down box.
6. Click the + icon to add the product.
The selected product will be added to the list.
7. Repeat Step 5 through Step 8 to add more products, if needed. Repeat the steps for other tabs as well, if needed.

What to do next

You can move to adding characteristics to an offer. See the topic, [Adding Characteristics to an Offer](#), for more details.

Adding Characteristics to an Offer

To add characteristics to an offer perform the following steps:







Prerequisites

You can add characteristics to an offer only if it already exists in the Fulfillment Catalog enterprise. Contact the administrator to add characteristics in the Fulfillment Catalog enterprise.

Procedure

1. Click **Characteristics**.
The characteristics page opens.

2. Set the characteristics by clicking the following tabs:

- a) **FEATURES** - Click the **FEATURES** tab and click the  icon. Place the cursor on the **Add a feature characteristic**, select a feature characteristic that is displayed in the dynamic drop-down box and then click the  icon to add the feature characteristic. Repeat the step to add more feature characteristics.
- b) **INSTANCES** - Click the **INSTANCES** tab and click the  icon. Place the cursor on the **Add an instance characteristic**, select an instance characteristic that is displayed in the dynamic drop-down box and then click the  icon to add the instance characteristic. Repeat the step to add more instance characteristics.
- c) **INPUTS** - Click the **INPUTS** tab and click the  icon. Place the cursor on the **Add an input characteristic**, select an input characteristic that is displayed in the dynamic drop-down box and then click the  icon to add the input characteristic. Repeat the step to add more input characteristics.

What to do next

You can move to adding segments to an offer. See the topic, [Adding Segments to an Offer](#), for more details.

Adding Segments to an Offer



To add segments to an offer perform the following steps:


Prerequisites


You can add segments to an offer only if it already exists in the Fulfillment Catalog enterprise. Contact the administrator to add segments in the Fulfillment Catalog enterprise.

Procedure

1. Click **Segments**.
The segments page opens.
2. Segments can be added in the following manner

- a) **There are no included segments required to qualify** - Click the  icon. Place the cursor on the **Add a segment to include** text box, select a segment that is displayed in the dynamic drop-down box and then click the  icon to add a segment to be included. Repeat the step to add more segments to be included.

- b) **There are no excluded segments required to qualify** - Click the  icon. Place the cursor on the **Add a segment to exclude** text box, select a segment that is displayed in the dynamic drop-

down box and then click the  icon to add a segment to be excluded. Repeat the step to add more segments to be excluded.

What to do next

You can move to adding pricing to an offer. See the topic, [Add Pricing to an Offer](#), for more details.

Adding Pricing to an Offer

To add pricing and discount to an offer, perform the following steps:

Procedure

1. Click **Pricing**.
The pricing page opens.
2. Click the + sign beside the **No charge - No price plan** field.
The Create Offer Charge Entry dialog box opens.
3. Provide values for the following fields in the **Details** tab:
 - **Charge name**- A name given to pricing component.
 - **Description**- Description about the pricing created.
 - **Price Plan**- The name of the Price Plan this charge will be in.
 - **Start**- The start date for the pricing offer.
 - **End**- The end date for the pricing offer.
4. Click the **Continue** button.
The **Price** tab is displayed.
5. Select the **Type** of pricing. The options are:

Option	Description
One Time	The pricing will be charged only once.
Recurring	The pricing will be a recurring price.
Usage	The pricing will be dependent on usage.

6. Provide values for the following fields:
 - **Amount**
 - **Min amount**
 - **Currency**
7. Click the **Continue** button.
The **Characteristics** tab is displayed.
8. The **Characteristics** tab and the **Segments** tab are optional. If you want to add values to the tabs, it is similar to adding **Characteristics** and **Segments** to an offer. See the following topics for more details:

- See the topic, [Adding Characteristics to an Offer](#) for details on adding values to the **Characteristics** tab.
 - See the topic, [Adding Segments to an Offer](#) for details on adding values to the **Segments** tab.
9. After completion of adding values (only if necessary) in the **Characteristics** tab and the **Segments** tab, click the **Continue** button.
The **Products** tab is displayed. This is also an optional tab.

10. Click the  icon.

11. Click the  icon.
The Create Product Pricing Group dialog box is displayed.

12. Provide values for the following fields:

- **Name** - The name for the product pricing group.
- **Min products** - The minimum number of products.

13. Select one of the following options:

- **Mass discount on "PPG test"**
- **Selected products**

14. Click the **Save PPG** button.
The control passes back to the **Products** tab in the Create Offer Charge entry dialog box.

15. Provide values for the following fields:

- **Max # items** - The maximum number of items in the group. As mentioned in the user interface, the maximum number of items must be greater than minimum values of products.
- **Max # apply** - The maximum number of apply for the items in the group. As mentioned in the user interface, the maximum number of items must either be -1 or positive.

16. Click the **Save Charge** button to save the pricing details that were added.
The control passes back to the pricing page and the newly added pricing will be displayed.

17. Click the + sign corresponding to the new pricing plan created.
The Create Discount Entry dialog box opens.



18. Provide values for the following fields in the **Details** tab:

- **Discount name**- A name given to discount component.
- **Description**- Description about the discount offered.
- **Start**- The start date for the discount.
- **End**- The end date for the discount.

19. Click the **Continue** button.
The **Price** tab is displayed.

20. Select the type of discount. The options are:

Option	Description
%	Percentage of price
\$	A set price for discount

21. Enter the discount value in the amount field.
22. Click the **Continue** button.
The **Characteristics** tab is displayed.
23. The **Characteristics** tab and the **Segments** tab are optional. If you want to add values to the tabs, it is similar to adding **Characteristics** and **Segments** to an offer. See the following topics for more details:
 - See the topic, [Adding Characteristics to an Offer](#) for details on adding values to the **Characteristics** tab.
 - See the topic, [Adding Segments to an Offer](#) for details on adding values to the **Segments** tab.
24. After completion of adding values (only if necessary) in the **Characteristics** tab and the **Segments** tab, click the **Continue** button.
The **Products** tab is displayed. This is also an optional tab.
25. Click the  icon.
26. Click the  icon.
The Create Product Pricing Group dialog box is displayed.
27. Provide values for the following fields:
 - **Name** - The name for the product pricing group.
 - **Min products** - The minimum number of products.
28. Select one of the following options:
 - **Mass discount on "PPG test"**
 - **Selected products**
29. Click the **Save PPG** button.
The control passes back to the **Products** tab in the Create Offer Charge entry dialog box.
30. Provide values for the following fields:
 - **Max # items** - The maximum number of items in the group. As mentioned in the user interface, the maximum number of items must be greater than minimum values of products.
 - **Max # apply** - The maximum number of apply for the items in the group. As mentioned in the user interface, the maximum number of items must either be -1 or positive.
31. Click the **Save Discount** button to save the discount details that were added.
The control passes back to the pricing page and the newly added discount to the price will be displayed.
32. Repeat Step 3 through Step 31 to add more pricing and discount, if needed.
33. You can either keep the offer in **Draft** status or click the **Submit** button to change the status of the offer to **Pending Approval**.

Previewing an Offer

To preview newly created offers, or modified offers, perform the following steps:


Procedure

1. Click the offer you want to view. See the topic [Searching an Offer](#) to find the offer you want to view.
2. Click **Preview**.
The offer preview page is displayed.

Searching an Offer

To search for an existing offer, perform the following steps:


Procedure

1. Click the  icon.
A search panel will be displayed which will also help you filter the results. See the [Using Filters to Search an Offer](#) topic to filter the list of offers.
2. Enter the name of the offer in the **Search** text box and press the Enter key.
The list of offers similar to the entered name will be displayed.

Using Filters to Search an Offer

You can use filters to retrieve an offer. For using filters, perform the following steps:

Procedure

1. Click the  icon.
A search and filter panel will be displayed.
2. If you do not know the name of the offer you are searching for you can filter the list of offers using the following parameters:

Field	Description
Type	The type of offer. The choices are: <ul style="list-style-type: none"> • PO • BPO
Subtype	The subtype of the offer. The choices are: <ul style="list-style-type: none"> • Device • Internet • TV
Status	The status of the offer. The choices are: <ul style="list-style-type: none"> • Draft


Field	Description
	<ul style="list-style-type: none"> • Pending Approval • Active • Any

The list of offers based on the filters used will be displayed.

Cloning an Existing Offer

To clone an existing offer, perform the following steps:

Procedure

1. Search an offer you want to clone. See the topic [Searching an Offer](#) to find the offer you want to clone.
2. Click the  icon to clone the offer.
A dialog box is displayed requesting a new **Offer id**.
3. Enter the new **Offer id** and click the **Yes** button.
The new offer, cloned from the existing offer, is created. By default the status of the cloned offer is **Draft**.

Modifying an Existing Offer


You can only modify an existing offer if it's status is **Draft** or **Active**. You cannot modify an offer with any other status.

To modify an existing offer, perform the following steps:

Prerequisites

See the topic [Creating an Offer](#) for more details.

Procedure

1. Click the offer you want to modify. See the topic [Searching an Offer](#) to find the offer you want to modify.
2. Click the  icon.
The fields will be unblocked so that you can make the modifications.
3. Make the necessary modifications and click the **Submit** button.
A dialog box displayed with a request for approval.
4. Click the **Submit** button.
The offer will be modified and sent for approval.


Deleting an Offer

To delete an offer, perform the following steps:



An offer in **Pending Approval** status cannot be deleted. Only the offers in **Draft** and **Active** status can be deleted.

Procedure

1. Search an offer you want to delete. See the topic [Searching an Offer](#) to find the offer you want to delete.
2. Click the  icon to delete the offer.
A dialog box is displayed asking if you want to delete the offer.
3. Click the **Yes** button.
The offer will be deleted along with all the objects associated with the offer.