



TIBCO® Product and Service Catalog

Offer and Price Designer User Guide

*Version 5.1.0
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Offer and Price Designer Overview

The Offer and Price Designer is a component of TIBCO® Product and Service Catalog (formerly known as TIBCO® Fulfillment Catalog).

TIBCO Product and Service Catalog has a robust system to perform all catalog-related functions; however, it is designed for technical users and requires basic technical proficiency to perform even primary tasks such as defining low-level records.

The Offer and Price Designer component eliminates this complexity with an intuitive user interface and a simplified workflow. Users get a business-oriented view of the data, which can be used when performing everyday tasks such as offer creation activities.

The benefits of Offer and 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.
- Creating complex rules and working with them easily with the help of rules editor.

Offer and Pricing Designer can be started in two modes, lite and heavy. Use the property `app.dataVolume` to set the mode. For example, `app.dataVolume=lite` or

`app.dataVolume=heavy` If this property is not set while starting the Offer and Price Designer server, the Offer and Price Designer starts in lite mode by default.

Use lite mode when the existing or new offer has a simple hierarchy with total number of child nodes 20 or less than 20, for the first three levels in the hierarchy and any relationship type.

Use heavy mode if the existing data set is large and offers have a complex hierarchy with the total number of child nodes for the first three levels in the hierarchy being more than 20.

There are some differences in user experience and feature limitations when Offer and Price Designer runs in the heavy and lite modes as given in the following table:

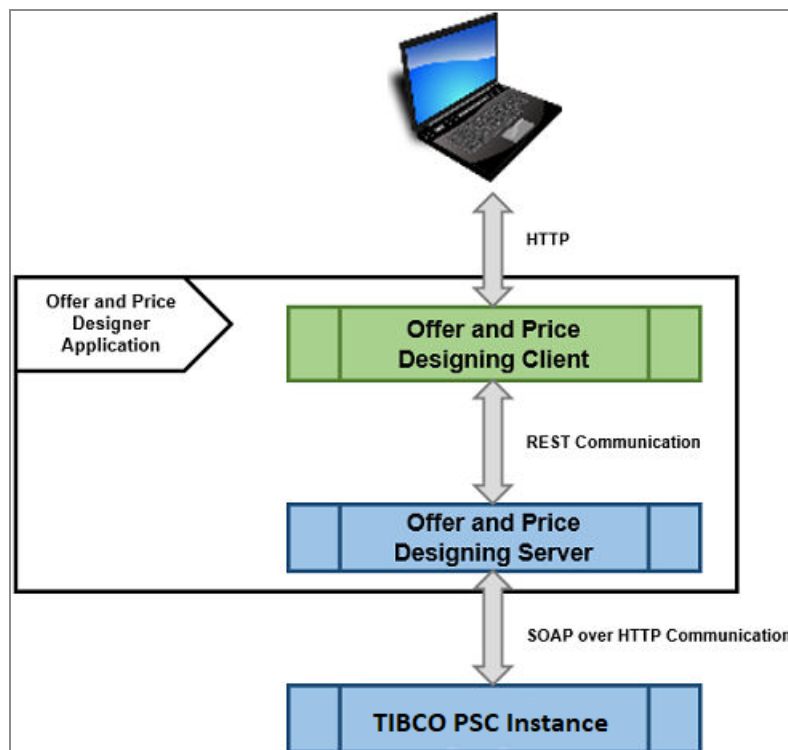
Heavy Mode Offer and Price Designer	Lite Mode Offer and Price Designer
The heavy mode Offer and Price Designer has a large dataset therefore child nodes are fetched page-wise. This is done by using the property <code>fc.pcochildren.pagesize</code> . The default size is 10 child nodes per page.	You can view all the child nodes in a single window as the dataset is limited to 20 child nodes.
Need to scroll the Products tab to view all the child nodes, if the child nodes of a product are more than what is defined in the <code>fc.pcochildren.pagesize</code> property.	No need to scroll the Products tab as the dataset is limited.
While adding the product through the Products tab, it needs to be added in the hierarchy before scrolling the tab, else the product tray gets lost.	Scrolling the Products tab while adding product does not cause any loss of product tray.
Hierarchy view is visible only when the Products tab is accessed.	Hierarchy view button is visible on the Offer Details page.
On the Price tab, it takes a time to fetch the price of child product.	No waiting time, as the price of child products is available immediately.
To view the price of a particular child node, user needs to navigate to that child node and then switch to the Price tab.	No such navigation required.

Heavy Mode Offer and Price Designer	Lite Mode Offer and Price Designer
On the Products tab, only the first level of child nodes is listed. Showing all child nodes creates an impression of duplicate child nodes.	Child nodes from all three levels are displayed.
Incompatibility between child nodes is not displayed in the heavy mode Offer and Price Designer.	Incompatibility between child nodes is displayed on mouse hover.

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 TIBCO Product and Service 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 TIBCO Product and Service Catalog instance.

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

Offer and Price Designer Security and Credentials

The Offer and Price Designer configuration contains the address of the instance of TIBCO Product and Service Catalog. The client user interface requests for credentials. The required credentials are TIBCO Product and Service Catalog credentials and are sent directly to TIBCO Product and Service 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 TIBCO Product and Service Catalog, which is used in subsequent communication with the TIBCO Product and Service Catalog system.

Relationships Handled by Offer and Price Designer and Offer and Price Designer Rules Editor

The relationships of TIBCO Product and Service Catalog handled by the Offer and Price Designer are as follows:

Relationships of TIBCO Product and Service 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
PRODUCT	SALESCHANNEL	HasChannel
PRODUCT	KEYVALUE	ProductKeyValue
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

The relationships of TIBCO Product and Service Catalog handled by the Offer and Price Designer Rules Editor are as follows:

*Relationships of TIBCO Product and Service Catalog
Handled by the Offer and Price Designer Rules Editor*

Source	Target	Relationship Name
RULE	RULECONDITION	Condition
RULE	RULEPARAMETER	RuleParameter

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 TIBCO Product and Service Catalog enterprise. Only the user having the administrator role in the TIBCO Product and Service Catalog enterprise can create users who can access the TIBCO Offer and Price Designer system.

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

Before you begin

To perform the following steps you must have the administrator role in the TIBCO Product and Service Catalog enterprise:

Procedure

1. Access the TIBCO Product and Service Catalog system and log in 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 is used for logging in to TIBCO Offer and Price Designer.
First Name	Enter the first name of the user.

Fields	Description
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.

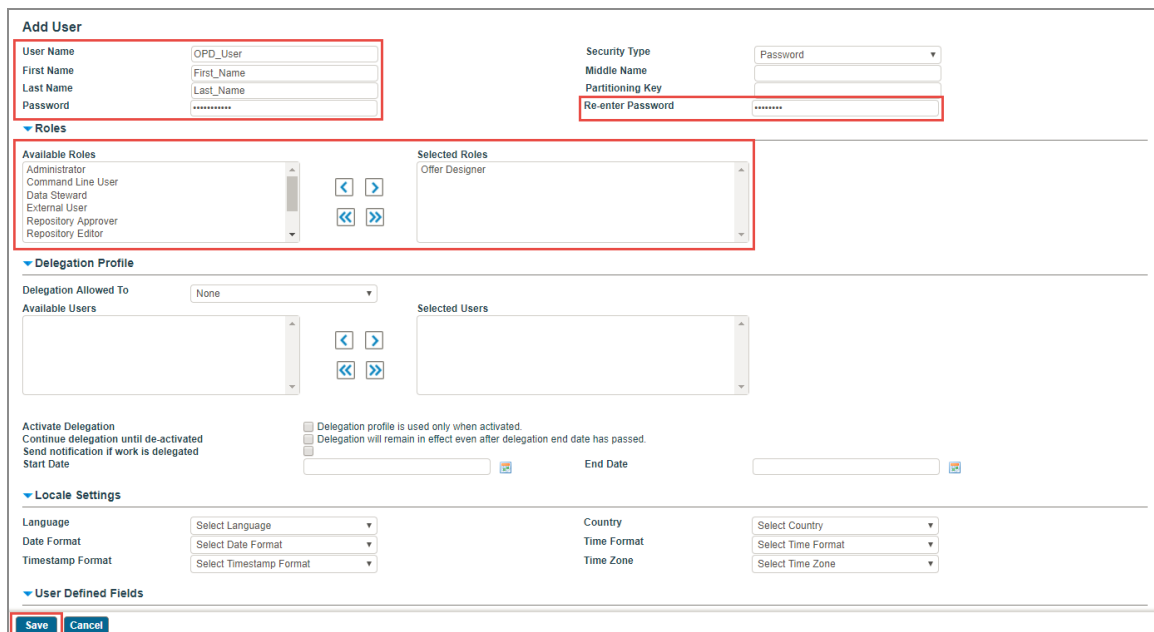
5. In the **Roles** panel, highlight the **Offer Designer** option from the **Available Roles** list and click .

The action performed adds **Offer Designer** role in the **Selected Roles** list.

6. Click **Save**.

The new user is created and the user can access and use the *Offer and Price Designer* system.

Creating Users for Offer and Price Designer



Add User

User Name: OPD_User
 First Name:
 Last Name:
 Password:

Security Type: Password
 Middle Name:
 Partitioning Key:
 Re-enter Password:

Roles

Available Roles: Administrator, Command Line User, Data Steward, External User, Repository Approver, Repository Editor
 Selected Roles: Offer Designer

Delegation Profile

Delegation Allowed To: None
 Available Users:
 Selected Users:

Activate Delegation
 Continue delegation until de-activated
 Send notification if work is delegated
 Start Date: End Date:

Locale Settings

Language: Select Language
 Date Format: Select Date Format
 Timestamp Format: Select Timestamp Format
 Country: Select Country
 Time Format: Select Time Format
 Time Zone: Select Time Zone

User Defined Fields

Save **Cancel**

Logging in to Offer and Price Designer

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

Procedure

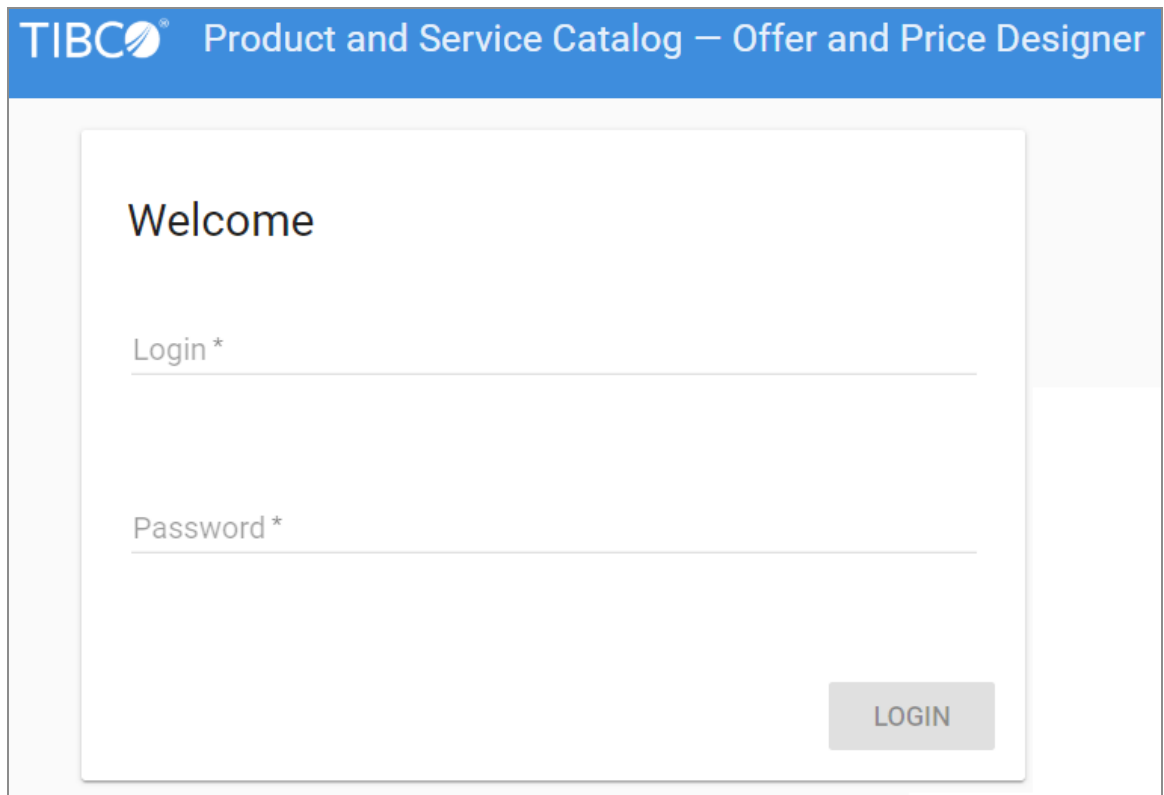
1. Open a browser and access the following URL format: http://host:port/opdesigner to launch Offer and Price Designer:

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.

Logging in to Offer and Price Designer



The screenshot shows a web application interface for logging in. At the top, there is a blue header bar with the TIBCO logo and the text "Product and Service Catalog – Offer and Price Designer". Below the header, the main content area has a light gray background. In the center, there is a white rectangular box with a thin gray border. Inside this box, the word "Welcome" is displayed in a large, bold, black font. Below "Welcome", there are two input fields: "Login *" and "Password *", both with gray text and a horizontal line for text entry. To the right of the "Password *" field, there is a gray rectangular button with the word "LOGIN" in white, uppercase letters.

Offer and Price Designer User Interface Overview







The Homepage

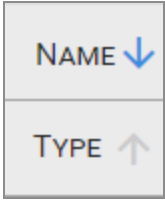
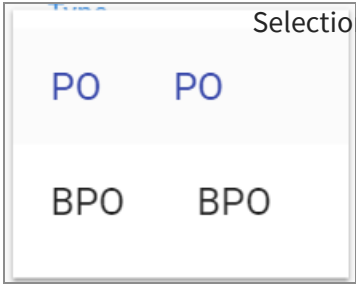


The Offer and Price Designer has a simple and intuitive user interface. The homepage is a clutter-free layout. You can perform all the operations related to Offers from the homepage itself.





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 for an offer or to filter the results.
	To edit an existing offer.

Icon/Element	Description
	<p>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.</p>
	<p>Selection boxes. You can only select one.</p>
	<p>Shows the timeline of the offer from the start of the offer to the end of the offer.</p>
	<p>Shows the status of the offer. The status can be:</p> <ul style="list-style-type: none"> • Draft • Pending Approval • Active • Rejected • Retired • Obsolete

Icon/Element	Description
	Toggle button that either activates or deactivates the Single Use function.
	To expand the node to view the child nodes in the hierarchy.
	To go to next and previous child nodes in the graph view.
	

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** drop-down menu.
2. Click **About**.

The dialog box contains details about Offer and Price Designer.

Viewing Details About Offer and Price Designer

About Offer and Price Designer

The server is configured with the following parameters:

Server URL `http://10.108.64.119:8060/opdesigner`

User `opd @ fc41mig3`

Default currency `$ USD`

Offer status
DRAFT
PENDING
APPROVAL
ACTIVE
Disabled
Rejected
Launched
RETIRED
Obsolete
Inactive

Single offer record `["PO","BUNDLE","SERVICE"]`

Bundle offer record `["BPO","HARDWARE"]`

Autoprovisioned offer records `CFS`

Offer sub types
Device
Internet
TV

Price boundary starts at zero `true`

Price boundary min included `true`


Price boundary max included `true`

Rule Types
Eligible
InEligible
InCompatible

Rule Status
DRAFT
PENDING
APPROVAL
ACTIVE
Disabled
Rejected
Launched
RETIRED
Obsolete
Inactive

Date format `MM/dd/yyyy`
ie: 08/23/2019

Data Volume `lite`



2019-08-15T20:11:26Z

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Refreshing the Cache

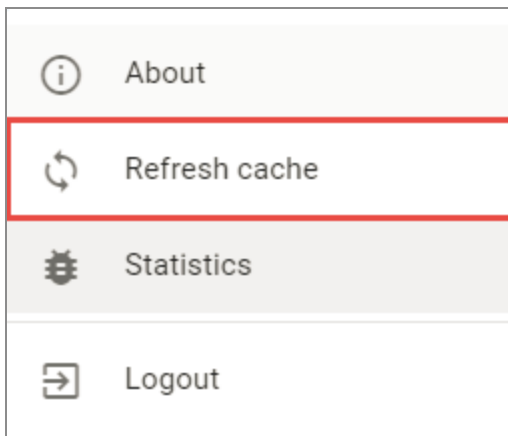
Since Offer and Price Designer is linked to the server that stores the data of TIBCO Product and Service Catalog, it is necessary to ensure that the data is synchronized between the two applications. By refreshing the cache you synchronize the data between the two applications. To refresh the cache,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

Procedure

1. Click the **Profile** drop-down menu.
2. Click **Refresh cache**.

The data is synchronized between Offer and Price Designer and TIBCO Product and Service Catalog.

Refreshing the Cache



i Note: If you cannot view the new records, added using the TIBCO Product and Service Catalog system (like offers, characteristics, segments, and so on), or the change in status of offers, validated from the TIBCO Product and Service Catalog system, you must 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** drop-down menu.
2. Click **Statistics**.

The dialog box contains all the statistics about Offer and Price Designer.

Viewing Offer and Price Designer Statistics

Statistics

Server started 4 hours ago (11 April 2018 17:57:24)

RESET

START CAPTURE

Command	Nb calls	Duration (ms)				Nb FC cmds	Time in FC (ms)				Spent in FC
		total	min	avg	max		total	avg	max	slowest FC function	
getOffers	2	1669	698	835	971	2	1515	758	842	select on PRODUCT [page=0, size=20, sort=productId: ASC, filters=[type In 'BPO,BUNDLE,HARDWARE,TARIFF,DEVICE,SERVICE,PO']]	<div><div></div></div> 91%
getStats	1	52	52	52	52	0					
newWorkingOffer	2	4586	2,036	2,293	2,550	1	2311	2,311	2,311	read (1)	<div><div></div></div> 50%
updateWorkingOffer	3	2777	516	926	1,726	3	1179	393	461	read (1)	<div><div></div></div> 42%

FC command	Nb calls	Duration (ms)			
		total	min	avg	max
read (1)	4	3490	343	873	2,311
select on PRODUCT [page=0, size=20, sort=productId: ASC, filters=[type In 'BPO,BUNDLE,HARDWARE,TARIFF,DEVICE,SERVICE,PO']]	2	1515	673	758	842


Offers

The following topics are covered in this section:

- [Creating an Offer](#)
- [Searching an Offer](#)
- [Using Filters to Search for an offer](#)
- [Cloning an Existing Offer](#)
- [Modifying an Existing Offer](#)
- [Deleting an Offer](#)
- [Retiring an Offer](#)
- [Obsoleting 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 is displayed in the offer list.

Field	Description
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

The **Type** options can be customized by using the property `fc.poType` and `fc.bpoType` in the `application.properties` file. For example,
`fc.poType=ELEMENT1,ELEMENT2,ELEMENT3` and
`fc.bpoType=ELEMENT1,ELEMENT2,ELEMENT3`

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 is 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.

Note: In this step, if you click **Submit**, the offer is 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 is saved with the **Draft** status.

- Click the **Submit** button.

A dialog box displayed with a request for approval.

- Click **Submit**.

The offer is created and sent for approval.

Creating an Offer

The screenshot shows the TIBCO Product and Service Catalog Offer and Price Designer interface. The top navigation bar includes the TIBCO logo, the title 'Product and Service Catalog — Offer and Price Designer', and tabs for 'OFFERS', 'RULES', and 'LOGGED IN AS OPD'. The main content area is titled 'Package offer — Details' with a 'DRAFT' status indicator. A left sidebar contains a navigation menu with options: 'OFFER LIST', 'Details', 'Products', 'Characteristics', 'Segments', 'SalesChannel', 'Pricing', and 'KeyValues'. The 'Details' section is active, displaying the following information:

- Offer id ***: OFFER-123#3212
- Name ***: Package offer
- Short description**: Package offer for internet and calling
- Long description**: (empty field)
- Type**: PO (dropdown menu)
- SubType**: Internet (dropdown menu)
- Offer only once for Customer**: (toggle switch, currently off)
- Start**: 8/3/2018 (dropdown menu)
- End**: 8/3/2018 (dropdown menu)
- Duration**: in 10 hours (text input)
- Image URLs**: (empty field)

The Offer Life Cycle

An offer passes through different stages in its life cycle.

An offer undergoes the following stages in a life cycle:

- **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 or delete an offer in this state. Only the administrator can approve the offer. For details, see the [Approving an Offer for Activation by Offer and Price Rule Editor](#) or [Approving an Offer for Activation by TIBCO Product and Service Catalog System](#) topics.

- **Active-**

Once the administrator approves the offer, then status of the offer changes to **Active**. In this state the offer is active and ready for fulfillment. You can modify an offer in this state.

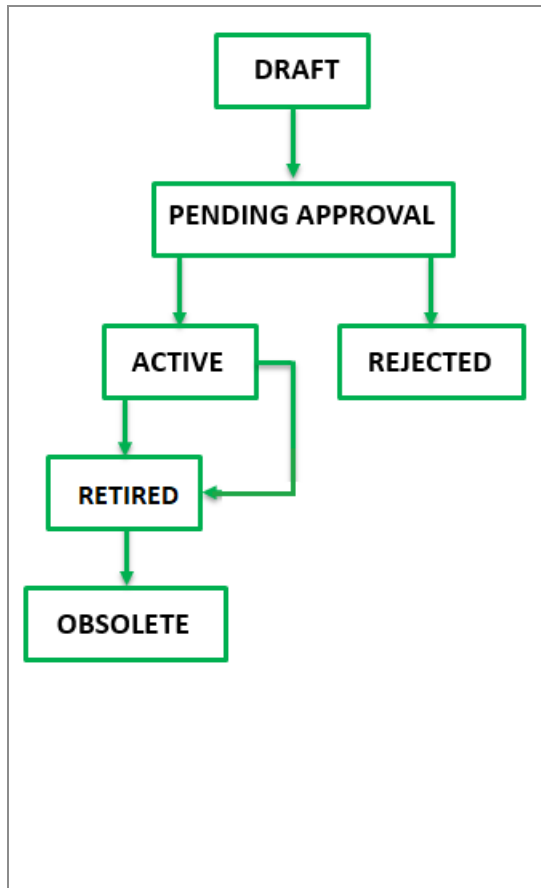
- **Obsolete**

An offer in the **Retired** state can be changed to the **Obsolete** state. An **Obsolete** offer is not available for order fulfillment.

- **Rejected-**

If the administrator rejects an offer that is pending for approval, the status of the offer changes to **Rejected**. In this state, the offer is not ready for fulfillment. You cannot modify an offer in this state.

Stages of an Offer



Activating an Offer by Using the Offer and Price Rule Editor


Only a user with administrator role can approve an offer for its activation. There exist two methods for approving an offer, one is by using the Offer and Price Rule editor and the other is by using the TIBCO Product and Service Catalog system. To activate an offer, you must approve the offer for activation.

See the topic [Offer and Price Designer Rules Editor](#) for more information on the Offer and Price Designer Rule Editor. To approve an offer for its activation by using the Offer and Price Rule editor, perform the following steps:


Procedure

1. Log in to Offer and Price Designer as an administrator.

The Offer List page is displayed.

2. In the **Offer List** table, click the Approve icon  next to the offer that you want to activate.
3. On the confirmation window, enter a comment for approving the offer and click **Yes**. The offer is approved and the status changes to **Active**.

Approving an Offer



A confirmation dialog box with a light gray border. The title bar is not visible. The main content area has a white background. At the top, the text "Do you like to approve offer '98765'?" is displayed in a bold, black, sans-serif font. Below this text is a text input field with a light blue border and a blue underline. The placeholder text "Comment" is visible in the input field. At the bottom of the dialog, there are two buttons: "NO" and "YES", both in a blue, sans-serif font.

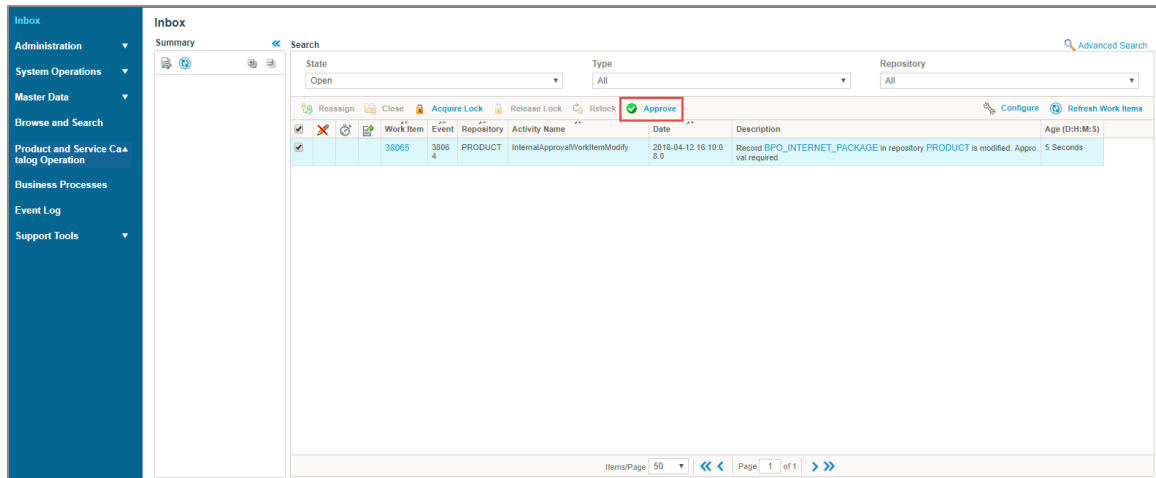
Approving an Offer for Activation by Using the TIBCO Product and Service Catalog System

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

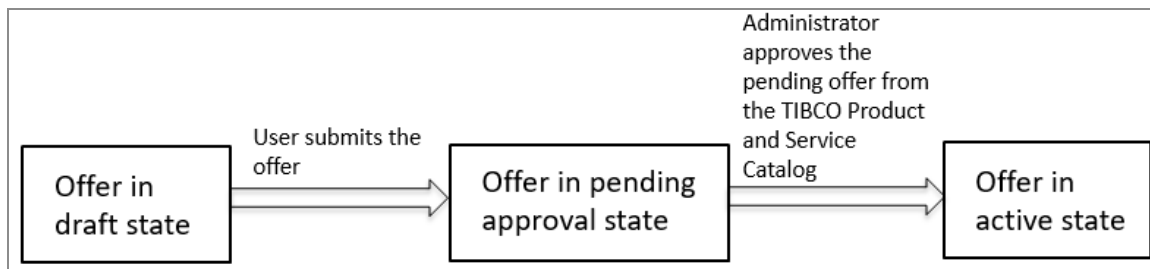
1. Log in to the TIBCO Product and Service Catalog system by using administrator credentials.
2. Click the **Inbox** menu.
3. On the **Inbox** page, select the offer you want to activate and click **Approve**.
4. In the Confirmation window, click **Yes** to confirm the approval. The status of the offer changes to **Active**.

Approving an Offer



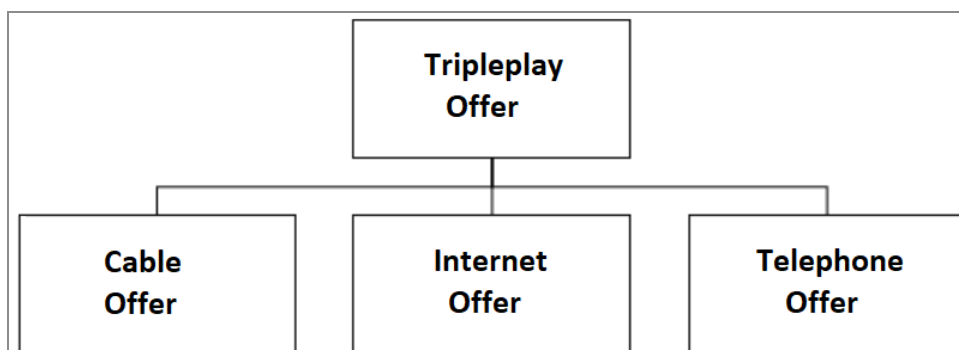
Use Case 1: Approving a Simple Offer

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



Use Case 2: Approving a Bundled Offer

A bundled offer contains a parent-child structure. Consider a parent offer named TriplePlay Offer which has the following child offers:



Activating child offers when the parent and child offers are in draft state:

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 remain in **Draft** state. To activate the child offers you must submit all child offers individually.


Activating child offers when the parent offer is in draft state and child offer is in active state:

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.

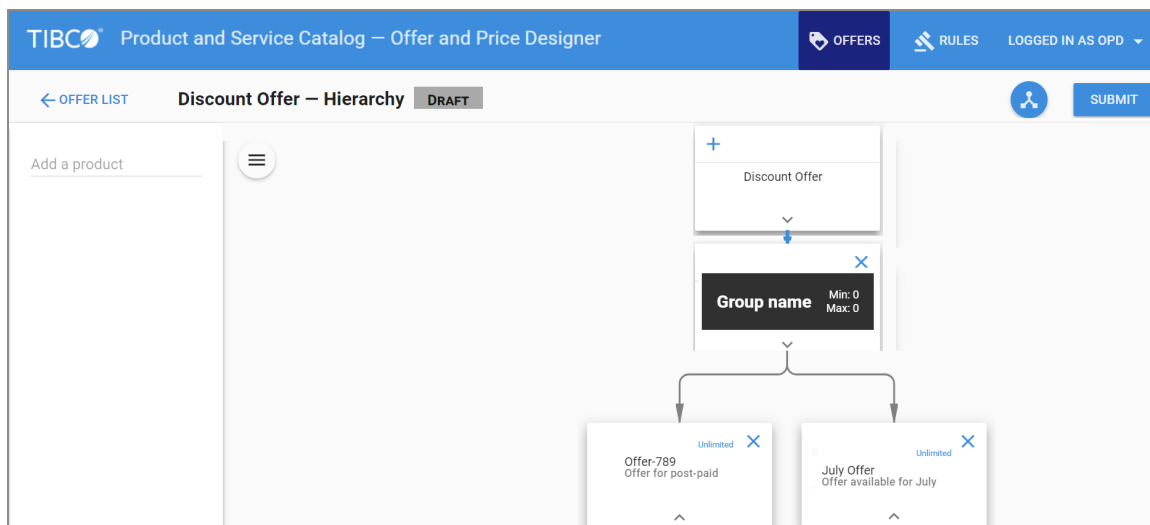
Graph View of the Offers

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.

Graph View of the Offers




Using Graph View to Add Products to an Offer

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

Before you begin

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. Open the offer in edit mode: On the OFFER LIST page click the edit view  icon associated with the offer to which you want to add products.

The Offer Details page appears.

2. On the Offer Details page, click the **Products** menu.

The Products tab opens.

3. Click the  icon.

4. Click the + sign in the offer box.

A child is added to the node.

5. Place the cursor in the **Add a product** text box.

A dynamic drop-down box is displayed with the list of products.



Note: The products of type **GROUP** are not displayed in this list.

6. Select a product to be added.

The selected product is displayed beneath the **Add a product** text box. Repeat this step to add more products.

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.

You can navigate through nodes using the next and previous arrows.

9. You can also create a group of child nodes, by dragging the multiple products one by one to the child node where you want to create a group.

10. Click the **Submit** button.

A dialog box displayed with a request for approval.

11. Click the **Submit** button.

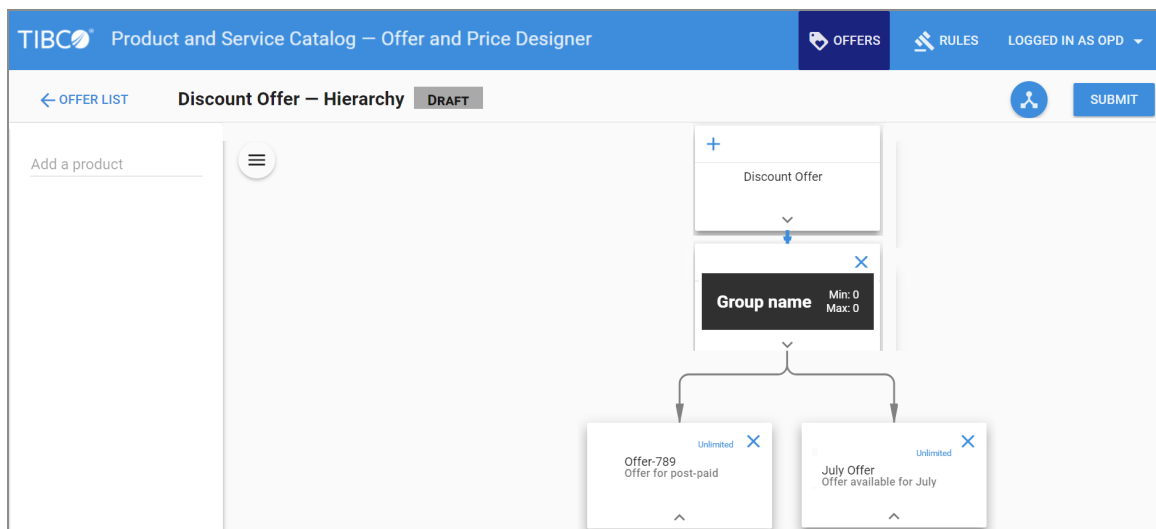
A graph is created and sent for approval.

Note: Only 3 levels of hierarchy can be viewed using the graph view.

Note:

The offer is not submitted until you activate all its child nodes. If any of the child nodes is in **Pending approval** or **Draft** state then you have to activate it first and submit the offer for approval.

Using Graph View to Add Product to an Offer



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
- Characteristics

- Segments
- SalesChannel
- Pricing
- KeyValues

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

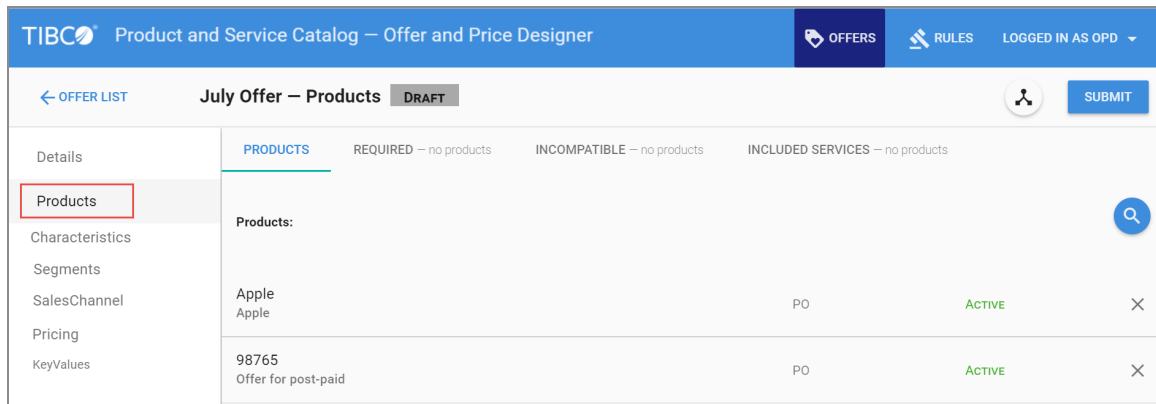
1. Click **Products**.
The products page opens.
2. If the offer has some products added to it or the products having Autoprovision=False, the list of products are displayed. If the offer has no products added to it the products having Autoprovision=True, the list of products is not be displayed.
3. Set 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. **INCLUDED SERVICES** - Use the tab to add products that are automatically provisioned.
4. Click any one of the tabs and click the  icon.
5. Select the required value for one or all of the following fields:
 - a. **Type**
 - b. **Subtype**
 - c. **Status**
6. Place the cursor on the **Add a product** text box and select a product that is displayed in the dynamic drop-down box.

- Click the **+** icon to add the product.

The selected product is added to the list.

- Repeat Step 6 through Step 7 to add more products, if needed. Repeat the steps for other tabs as well, if needed.

Viewing Products of an Offer



Adding Characteristics to an Offer

To add characteristics to an offer perform the following steps:



Before you begin

You can add characteristics to an offer only if it already exists in the TIBCO Product and Service Catalog enterprise. Contact the administrator to add characteristics in the TIBCO Product and Service Catalog enterprise.





Procedure

- Click **Characteristics**.

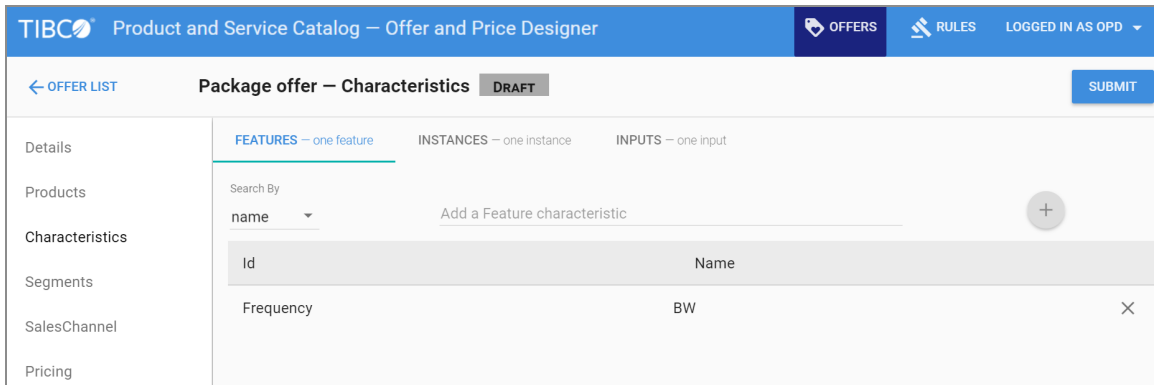
The characteristics page opens.

- Set the characteristics by clicking the following tabs:
 - 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.

Adding Characteristics to an Offer



TIBCO® Product and Service Catalog – Offer and Price Designer

OFFERS RULES LOGGED IN AS OPD

← OFFER LIST Package offer – Characteristics DRAFT SUBMIT

Details FEATURES – one feature INSTANCES – one instance INPUTS – one input

Products Search By name Add a Feature characteristic +

Id	Name
Frequency	BW

SalesChannel Pricing

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:

Before you begin



You can add segments to an offer only if it already exists in the TIBCO Product and Service Catalog enterprise. Contact the administrator to add segments in the TIBCO Product and Service Catalog enterprise.


Procedure

1. Click **Segments**.

The segments page opens.

2. Segments can be added in the following manner

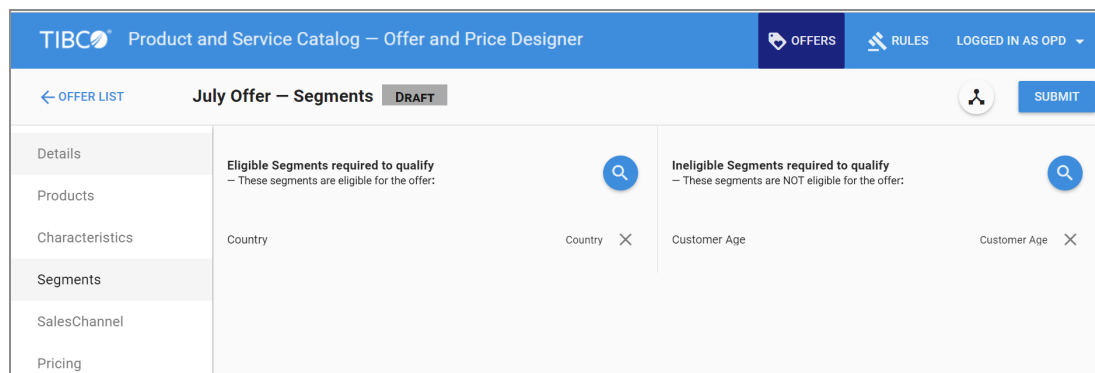
- a. **There are no eligible segments required to qualify** - Click the  icon. Place the cursor on the **Add a segment to include** text box, select a segment that is displayed in the dynamic drop-down box and then click the  icon to add a segment to be included. Repeat the step to add more segments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

- b. **There are no ineligible segments required to qualify** - Click the  icon. Place the cursor on the **Add an ineligible 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.

Adding Segments to an Offer



What to do next

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



Adding SalesChannels to an Offer

Before you begin

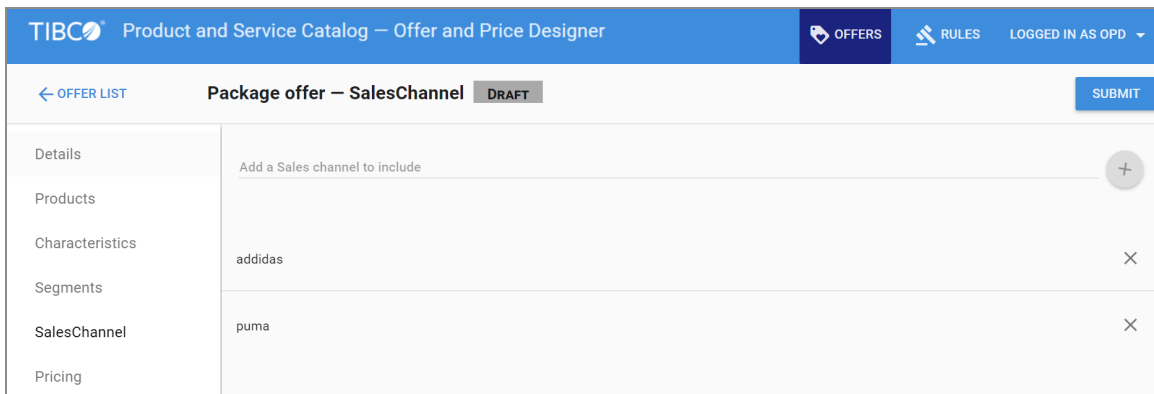
You can add SalesChannel to an offer only if it already exists in the TIBCO Product and Service Catalog enterprise. Contact the administrator to add SalesChannel in the TIBCO Product and Service Catalog enterprise.

Procedure

To add a SalesChannel to an offer perform the following steps:

1. On the Offer Details page, click the **SalesChannel** menu.
The SalesChannel page opens.
2. **There are no SalesChannel** - Click the  icon. Place the cursor on the **Add a SalesChannel to include** text box, select a SalesChannel that is displayed in the dynamic drop-down box and then click the add  icon to add a Saleschannel to be included. Repeat the step to add more Saleschannels to be included.

Adding SalesChannel to an Offer



The screenshot shows the TIBCO Product and Service Catalog — Offer and Price Designer interface. The top navigation bar includes the TIBCO logo, the page title, and tabs for OFFERS, RULES, and a user dropdown (LOGGED IN AS OPD). The main content area is titled "Package offer — SalesChannel" with a "DRAFT" status and a "SUBMIT" button. A left sidebar contains a menu with options: Details, Products, Characteristics, Segments, SalesChannel (selected), and Pricing. The main panel shows a section for "Add a Sales channel to include" with a list of channels: "addidas" and "puma". Each channel has a close button (X) to its right. A plus icon (+) is visible at the top right of the list area.

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 is 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 is charged only once.
Recurring	The pricing is a recurring price.
Usage	The pricing is 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 is 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 is 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**.

 **Note:** The discounts having characteristics and segments are placed beyond level 3 in the hierarchy and therefore cannot be viewed.

Adding Pricing to an Offer

Adding KeyValues to an Offer

In an offer, the KeyValue repository is used to store extra information related to an offer in a key-value pair. To add KeyValues to an offer perform the following steps:

Procedure

1. On the Offer List page, click **Create a new offer** icon .
2. After setting the Offer ID and Name of the offer, click the **KeyValues** tab.
3. Click the icon. Enter the key name and value of the key. You can add multiple KeyValues by clicking the icon.
4. Click **Choose Files** and select the file containing information related to the offer and then click **Open**.
The file is attached to the KeyValue.
5. Click **Upload** icon to upload the file.

Adding KeyValues

Searching for an Offer

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

Procedure

1. Click the  icon.

A search panel is displayed which also helps you filter the results. See the [Using Filters to Search for 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 is displayed.

Searching for an Offer

Using Filters to Search for an Offer

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

Procedure

1. Click the  icon.

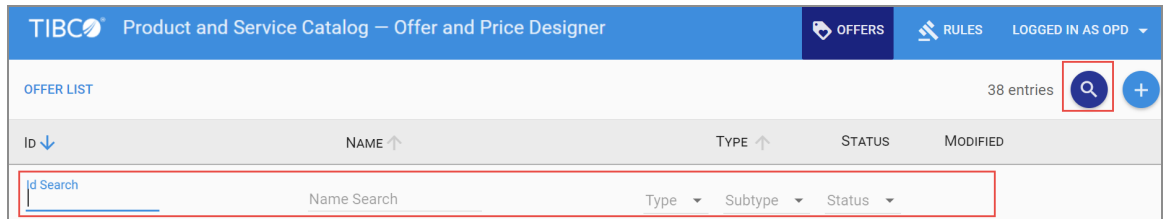
A search and filter panel is displayed.

2. You can search for a specific offer using either the **Offer ID** or **Offer Name**. 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• Pending Approval• Active• Rejected• Disabled• Retired• Obsolete• Inactive

The list of offers based on the filters used is displayed.

Using Filters to Search for an offer




Cloning an Offer

Note: The cloning operation is supported only in the lite mode Offer and Pricing Designer, and it is not supported in the heavy mode Offer and Pricing Designer.

To clone an existing offer, perform the following steps:

Procedure

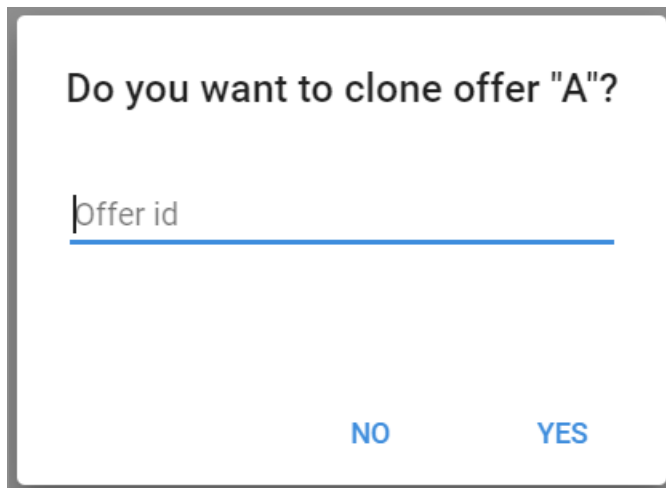
1. Search for an offer you want to clone. See the topic [Searching for an Offer](#) to find the offer you want to clone.
2. Click the  icon.

Select **Clone** from the displayed dialog box.

3. Enter the new **Offer id** and click **Yes**.

The new offer, cloned from the existing offer, is created. By default, the status of the cloned offer is **Draft**.

Cloning an Existing Offer



Do you want to clone offer "A"?

Offer id

NO YES

Modifying an Offer


You can modify an existing offer for any new changes.

Before you begin

Ensure that the offer is in **Draft** or **Active** state. Offer in any other state cannot be modified. You must be familiar with the procedure to create an offer. See [Creating an Offer](#) for more details.

Procedure

To modify an existing offer, perform the following steps:

1. Click the  icon associated with the offer you want to modify. To locate the offer that you want to modify, see [Searching for an Offer](#).
2. Click **Edit** and make the necessary modifications.
3. Click **Submit**.

Modified offer is moved to the **Pending Approval** state.

Rejecting an Offer


An offer that you submit is in the **Pending Approval** state until an administrator validates and approves it. After checking its viability, the administrator can approve or reject the

offer.

Procedure

1. Log in to Offer and Price Designer as an administrator.

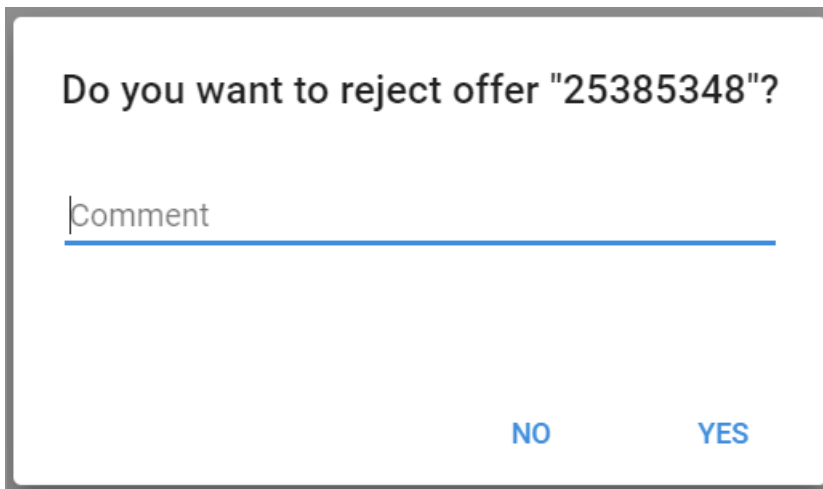
The Offer List page is displayed.

2. The **Offer List** contains the offers with the status **Pending Approval**. Click .

3. Select **Reject** from the pop-up window. Enter the comment for rejecting the offer and click **Yes**.

The offer is rejected and the offer state changes to **Rejected**.

Rejecting an Offer




Do you want to reject offer "25385348"?

Comment

NO YES

Deleting an Offer


To delete an offer, perform the following steps:

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

Procedure

1. Search for an offer you want to delete. See the topic [Searching an Offer](#) to find the

offer you want to delete.

2. Click the  icon.

A dialog box is displayed asking if you want to delete the offer.

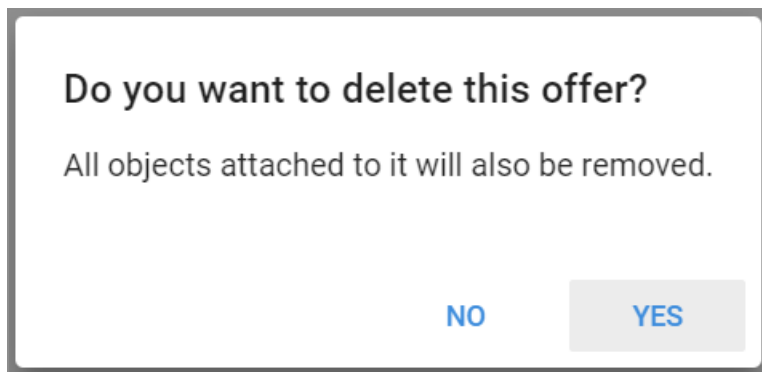
3. Click **Yes**.

The offer is removed from the offer list.



Note: A workitem is created once the offer is removed from the offer list. The administrator must approve the deletion of the offer. See the topics [Approving an Offer by Offer and Price Rule Editor](#) or [Approving an Offer by TIBCO Product and Service Catalog System](#).


Deleting Offer



Retiring an Offer

An offer must be in the Active state if it has to be retired. To retire an existing offer, perform the following steps:

Procedure

1. Search for the offer that you want to retire. See the topic [Searching for an Offer](#) to find the offer you want to retire.
2. Click the  icon to retire the offer.


The actions which can be performed on the offer are displayed.

3. Click **Retire**. The offer is retired.

Making an Offer Obsolete

Only the offers that are in Retired state can be made obsolete. . To make a retired offer as obsolete, perform the following steps:

Procedure

1. Search for the offer that you want to make obsolete. To find the offer you want to make obsolete, see [Searching for an Offer](#).
2. To make an offer obsolete, click the  icon.
The actions which can be performed on the offer are displayed.
3. Click **Obsolete**. The offer is made obsolete.

Offer and Price Designer Rules Editor

A rule consists of a condition and an outcome based on the execution of the condition. You can create rules from the Offer and Price Designer Rules Editor. Offer and Price Designer Rules Editor provides an easier UI for creating rules as compared with the very technical TIBCO Product and Service Catalog. You can perform the following operations on rules with the rules editor:

- [Creating Rules](#)
- [Cloning an Existing Rule](#)
- [Modifying an Existing Rule](#)
- [Enabling a Rule](#)
- [Disabling a Rule](#)
- [Searching for a Rule](#)
- [Using Filters to Search for a Rule](#)
- [Deleting an Existing Rule](#)
- [Approving a Rule](#)
- [Rejecting a Rule](#)

The Rule Lifecycle

A rule passes through different stages in its life cycle.

Following are the stages of the rule life cycle:

- **Draft-**

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

automatically.

- **Pending Approval-**

To change the state of the rule to **Pending Approval**, you have to submit the rule. You cannot modify or delete a rule in this state. Only the administrator can approve the rule. See the topic, [Approving a Rule](#), for more details.

- **Active-**

Once the administrator approves the rule, the status of the rule changes to **Active**. In this state the rule is active and ready for fulfillment. You can modify a rule in this state.

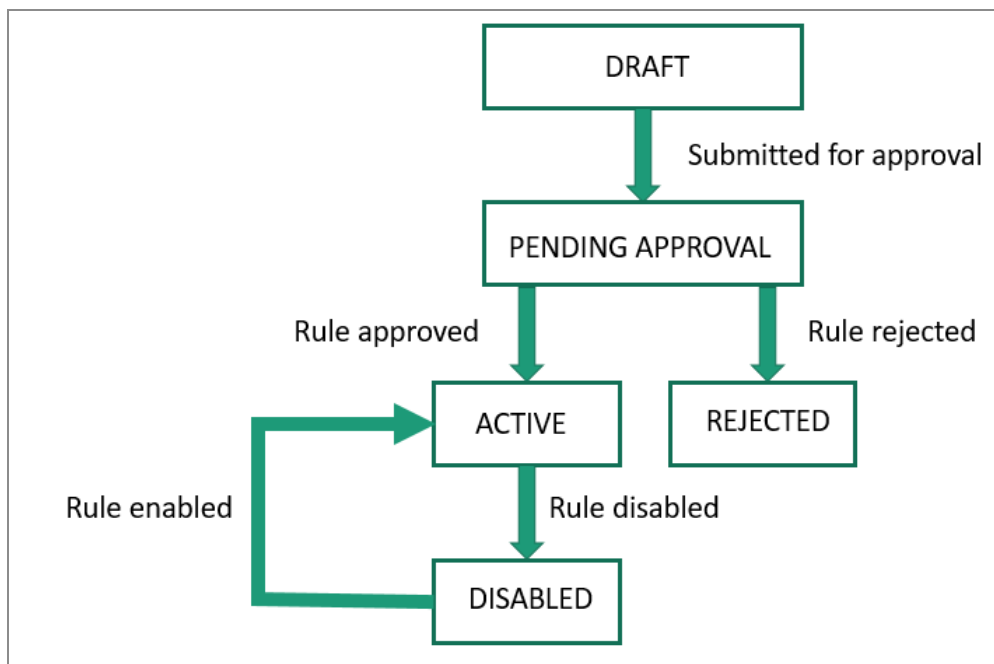
- **Rejected-**

If the administrator rejects the rule which is pending for approval, then the status of the rule changes to **Rejected**. In this state, the rule is not ready for fulfillment. You cannot modify a rule in this state.

- **Disabled**

An administrator can disable a rule. A disabled rule is not applied to any order. A disabled rule can be enabled from Offer and Pricing Designer. Once enabled, the rule can be applied to an offer.

Stages of Rule



Creating Rules

Types of rules that can be created are as follows:

- [Eligible Rule](#)
- [Ineligible Rule](#)
- [Incompatible Rule](#)


Before you begin




Familiarize yourself with the Rules Editor user interface. See the [Offer and Price Designer Rules Editor User Interface Overview](#) topic.

Creating an Eligible Rule

An eligible rule enables you to avail an offer if the conditions of that rule are true. To create an eligible rule, follow this procedure:

Procedure

1. Log in to the Offer and Price Designer.
The Offer List page is displayed.
2. Click on **Rules**.
The **Rules** tab is displayed.
3. Click the  icon for creating a new rule.
The new rule creation dialog box is displayed.
4. Provide values for the mandatory fields. Select **Eligible** in the **Type** field. Click **Editor**.
The **Editor** tab opens.
5. In the **Apply rule for** the field, select **All offers** for applying the rule for all offers. Select **Specific offers** for applying a rule to a specific offer. This means that a customer is eligible for all offers if the **All offers** is selected and for specific offers if the **Specific offers** is selected. Select the offers for which the rule would be applicable if **Specific offers** is selected.

- Click the  icon for adding a characteristic. You can add characteristics, add group, or remove group by clicking  icon. For applying rules to orders with multiple conditions, click  icon. See the topic [Designing Rule Criteria](#) for more information.
- In the If block, you can add an And or Or condition for the rule to be applicable to an order. Select **Inventory** or **Segment**. Enter the values in the mandatory fields and click **Finalize**.

The Rule Summary is displayed.

- After verifying the summary, click **Submit**. A confirmation window is displayed. Click **Submit** again.

The rule is submitted to the administrator for approval. The rule status is changed from **Draft** to **Pending Approval**.

Creating Eligible Rule

[< RULE LIST](#)

Rule Id - GST#100922356
DRAFT

☰

Details

>

📋

Editor

🚩

Finalize

Rule id *

GST#100922356

Name *

GST Rule

Short description





Type *

Eligible

Creating an Ineligible Rule

An ineligible rule means that a certain customer is ineligible to avail an offer if the conditions of that rule are true. To create an ineligible rule, follow this procedure:

Procedure

1. Log in to the Offer and Price Designer.
The Offer List page is displayed.
2. Click on **Rules**.
The **Rules** tab is displayed.
3. Click the  icon for creating a new rule.
The new rule creation dialog box is displayed.
4. Provide values for the mandatory fields. Select **Ineligible** in the **Type** field. Click **Editor**.
The **Editor** tab opens.
5. In the **Apply rule for** field, select **All offers** for applying the rule for all offers. Select **Specific offers** for applying rule to a specific offer.
6. Click the  icon for adding a characteristic. By adding a characteristic, you can add the conditions for applying rules to offers. You can add characteristics, add group, or remove group by clicking  icon. For applying rules to orders with multiple conditions, click  icon. See the topic [Designing Rule Criteria](#) for more information.
7. In the If block, you can add an And or Or condition for the rule to be applicable to an order. Select **Inventory** or **Segment**. Enter the values in the mandatory fields and click **Finalize**.
The Rule Summary is displayed.
8. After verifying the summary, click **Submit**. A confirmation window is displayed. Click **Submit** again.
The rule is submitted to the administrator for approval. The rule status is changed from **Draft**, to **Pending Approval**.

Creating an Ineligible Rule

← RULE LIST		Rule Id - Ineligible_Rule PENDING APPROVAL
<div>☰ Details ></div> <div>📋 Editor</div> <div>🚩 Finalize</div>	<div>Rule id *</div> <div>Ineligible_Rule</div> <hr/> <div>Name *</div> <div>Ineligible_Rule</div> <hr/> <div>Short description</div> <div>Ineligible_Rule</div> <hr/> <div>Type *</div> <div>InEligible ▼</div> <hr/>	

Creating an Incompatible Rule

An Incompatible rule condition states the incompatibility between two offers with a defined condition. If two offers are incompatible with each other then a customer cannot avail these two offers simultaneously. To create an incompatible rule, follow this procedure:

Procedure

1. Log in to the Order and Pricing Designer.
2. Click on **Rules**.


The **Rules** tab is displayed.

3. Click the + icon for creating a new rule.


The new rule creation dialog box is displayed.

4. Provide values for the mandatory fields. Select **Incompatible** in the **Type** field. Click **Editor**.

The **Editor** tab opens.

- In the **Editor** tab, you can define incompatibility between two offers. You can add a characteristic to the condition by clicking  icon. See the topic [Designing Rule Criteria](#) for more information.

The incompatibility between two offers is defined.

- You can add multiple offers which are incompatible with the offer in the first box, by clicking the  icon.

- Click **Finalize**.

The **Finalize** tab opens.

- Check the rule summary and click **Submit**.

The rule is submitted for approval. The status of the rule is now **Pending Approval**.









Creating an Incompatible Rule



← RULE LIST		Rule Id - FRS-987	PENDING APPROVAL
<div>☰</div> <div>Details</div> <div>></div>	<div>Rule id *</div> <div>FRS-987</div>		
<div>📋</div> <div>Editor</div>	<div>Name *</div> <div>Discount Incomaptible</div>		
<div>🚩</div> <div>Finalize</div>	<div>Short description</div>		
	<div>Type *</div> <div>InCompatible</div>		

Offer and Price Designer Rules Editor User Interface Overview

User Interface Components

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

Icon/Element	Description
	To add a new rule.
	To create the clone of an existing rule.
	To delete a rule.
	To search a rule or to filter the results.
<div>RULE NAME </div> <div>RULE ID </div> <div>TYPE </div>	To sort the rule list in ascending or descending order based on the field. Currently, rules can be sorted based on Rule Name , Type , or Rule ID . The blue arrow indicates the field on which the rule is sorted.
	
<div>DRAFT</div> <div>PENDING APPROVAL</div> <div>ACTIVE</div>	
	Shows the status of the rule. The status can be: <ul style="list-style-type: none"> • Draft • Pending Approval • Active • Rejected

Icon/Element	Description
<div>Rejected</div> <div>Disabled</div>	<ul style="list-style-type: none"> Disabled
	To approve a rule in Pending Approval status.
	To reject a rule in Pending Approval status.

Designing Rule Criteria

Rule criteria is additional criteria for the given rule. The criterion can be as simple as, bandwidth < 10. Or it can be a complex one that involves multiple simple criteria. Following types of rule criteria can be created:

- Simple rule criteria-
Simple rule criteria have a single criterion.
- Nested rule criteria-
Nested rule criteria have sub-criteria nested inside the main criterion.
- Multiple nested rule criteria-
Multiple nested rule criteria have multiple sub-criteria nested inside the main criterion.

See the topics [Creating an Eligible Rule](#), [Creating an Incompatible Rule](#), or [Creating an Ineligible Rule](#) to learn to create different types of rule criteria. This section explains how to create criteria for the rules.


Designing Simple Rule Criteria


Simple rule criteria have a single criterion. To create simple rule criteria, perform the following steps:



Procedure

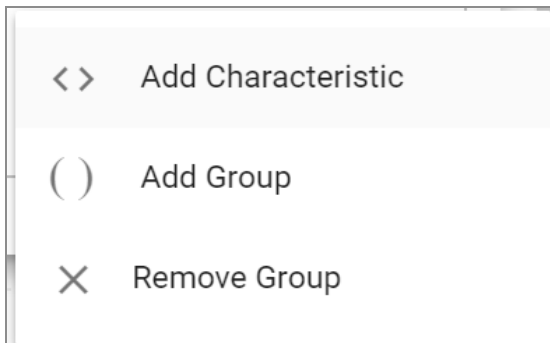
1. After entering the values for the necessary fields in the **Details** tab, click the **Editor** tab.

The **Editor** tab opens.

2. To add characteristic to the rule click **Add Characteristic** .



3. Click  to select the operator And or Or.
4. Click drop-down arrow icon  to **< > Add Characteristic**, **() Add Group**, or **X Remove Group** from the criterion.



5. Click **() Add characteristic**. Enter the values for **Characteristic**, **Operator**, and **Value**.

6. To add more characteristics, click and click () **Add Characteristic**.
7. Enter the values for **Characteristic**, **Operator**, and **Value**. You can keep adding the characteristics according to the criterion that you want to create.

8. Click **Finalize**.



The rule criteria are created.

Designing Nested Rule Criteria


A nested rule criterion uses nesting to influence the order of the criteria evaluation.

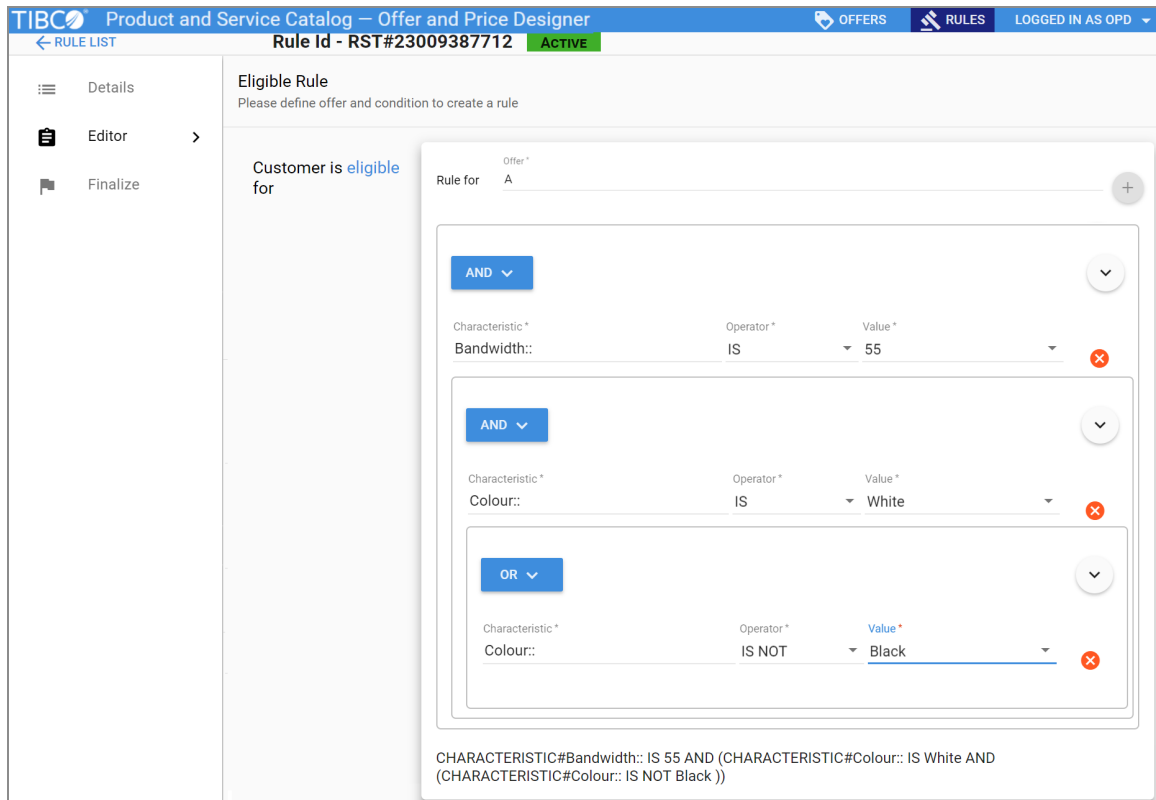
See the topic [Creating Simple Rule Conditions](#), steps 1 through 6 for creating a simple criterion. To create nested rule criterion, perform the following steps:

Procedure

1. Click . Click () **Add Group**. Select Or or And by clicking **AND** .

A nested criterion is added.

2. Click  in the new criterion. Click < > **Add Characteristic**. Enter the values for **Characteristic**, **Operator**, and **Value**. You can add multiple groups by repeating steps 1 and 2.



The screenshot shows the 'Eligible Rule' editor for Rule Id - RST#23009387712. The rule is currently 'Active'. The main criterion is 'Customer is eligible for'. A nested criterion is shown with the following structure:

- Group 1 (AND):
 - Characteristic: Bandwidth, Operator: IS, Value: 55
- Group 2 (AND):
 - Characteristic: Colour, Operator: IS, Value: White
- Group 3 (OR):
 - Characteristic: Colour, Operator: IS NOT, Value: Black

The final rule expression displayed at the bottom is: CHARACTERISTIC#Bandwidth:: IS 55 AND (CHARACTERISTIC#Colour:: IS White AND (CHARACTERISTIC#Colour:: IS NOT Black))

3. Click **Finalize**.

The rule criterion is created.

Note: The criterion inside the innermost bracket is executed first during the runtime.

4. A nested rule criterion can also be created as shown in the figure below.

TIBCO® Product and Service Catalog — Offer and Price Designer

OFFERS RULES LOGGED IN AS OPD

← RULE LIST Rule Id - RST#23009387712 DRAFT

Details Editor Finalize

Eligible Rule
Please define offer and condition to create a rule

Customer is eligible for

Rule for A

OR

Characteristic *	Operator *	Value *
Colour::	IS	White
Colour::	IS	Black

AND

Characteristic *	Operator *	Value *
Bandwidth::	IS	55

CHARACTERISTIC#Colour:: IS White OR CHARACTERISTIC#Colour:: IS Black OR (CHARACTERISTIC#Bandwidth:: IS 55)

Designing Multiple Nested Rule Criteria

A multiple nested rule criterion has multiple nested simple rule criterion.

See the topic [Creating Simple Rule Conditions](#), steps 1 through 6 for creating a simple criterion. To create multiple nested rule criterion, perform the following steps:

Procedure

1. Click . Click () **Add Group**. Select Or or And by clicking .

A nested criterion is added.

2. Click in the same criterion. Click < > **Add Characteristic**. Enter the values for **Characteristic**, **Operator**, and **Value**.
3. Add another characteristic by clicking and < > **Add Characteristic**.

TIBCO Product and Service Catalog — Offer and Price Designer

OFFERS RULES LOGGED IN AS OPD

← RULE LIST Rule Id - RST#23009387712 DRAFT

Eligible Rule
Please define offer and condition to create a rule

Customer is eligible for

Rule for Offer * A

AND

Characteristic * Operator * Value *

Colour:: IS Black

OR

Characteristic * Operator * Value *

Country:: IS India

Country:: IS USA

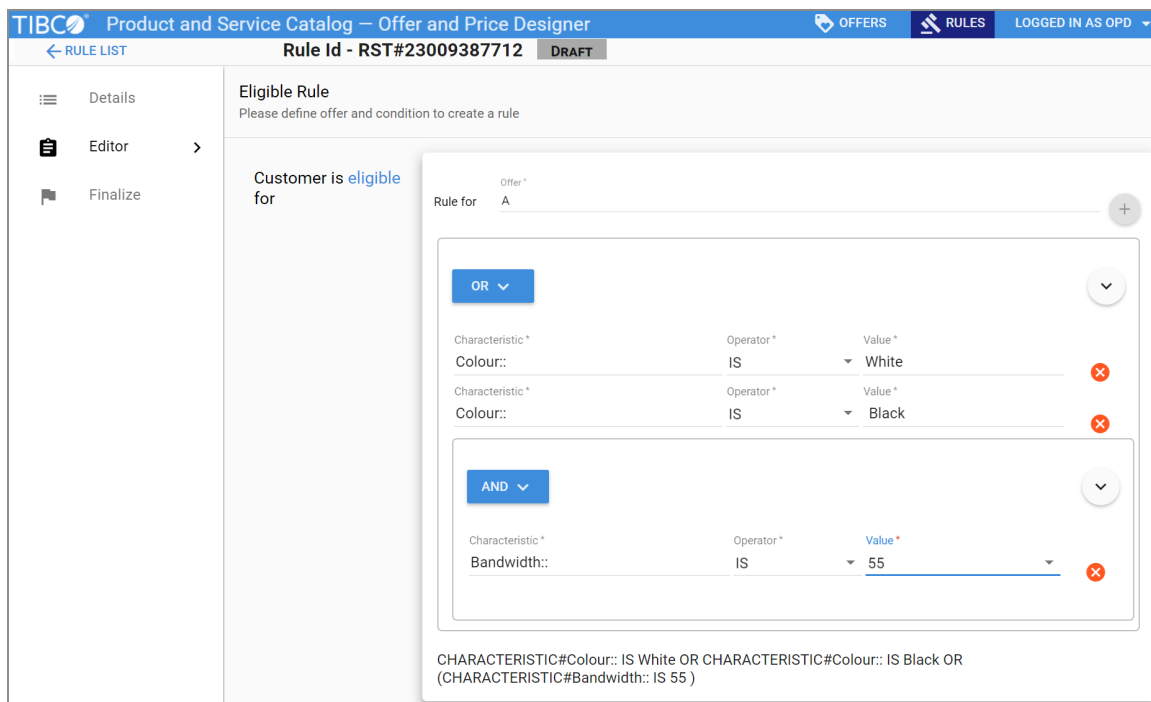
CHARACTERISTIC#Colour:: IS Black AND (CHARACTERISTIC#Country:: IS India OR CHARACTERISTIC#Country:: IS USA)

4. Click **Finalize**.

The rule criterion is created.



Note: The criterion inside the bracket is executed first during the runtime.



TIBCO® Product and Service Catalog — Offer and Price Designer

OFFERS RULES LOGGED IN AS OPD

← RULE LIST Rule Id - RST#23009387712 DRAFT

Details Editor Finalize

Eligible Rule
Please define offer and condition to create a rule

Customer is eligible for

Rule for Offer A

OR

Characteristic* Operator* Value*

Colour:: IS White

Characteristic* Operator* Value*

Colour:: IS Black

AND

Characteristic* Operator* Value*

Bandwidth:: IS 55

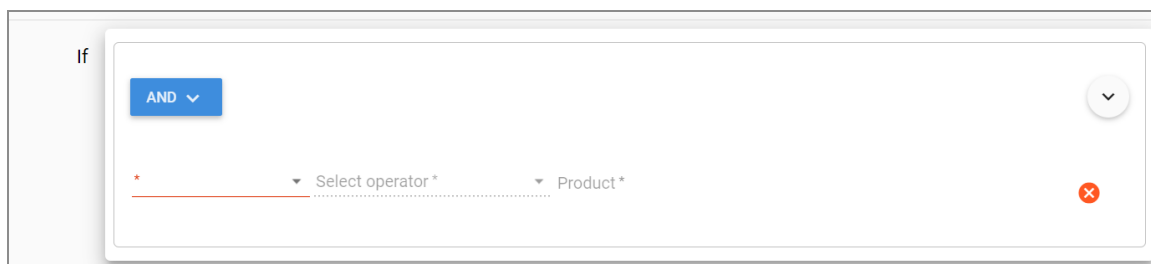
CHARACTERISTIC#Colour:: IS White OR CHARACTERISTIC#Colour:: IS Black OR (CHARACTERISTIC#Bandwidth:: IS 55)

Designing Simple Rule Condition

To create simple rule condition, perform the following steps:

Procedure

1. After entering the values for the necessary fields in the **Details** tab, click the **Editor** tab.
The **Editor** tab opens.
2. In the **If** condition box, add an Inventory or Segment by clicking on the downward arrow.




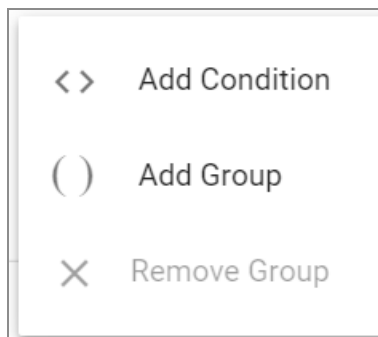
If

AND

* Select operator* Product*

Note: If you create a condition based on segment then segment type is the value of the class attribute in the Segment repository. Segment ID is the ID of the segment record created against that segment type.

3. Select the Operator and Product.
4. Click drop-down arrow icon  to **< > Add Condition**.



5. To add more conditions, click  and click **() Add Condition**.



6. Click **Finalize**.

Designing Nested Rule Condition

To create simple rule condition, perform the following steps:

Procedure


1. After entering the values for the necessary fields in the **Details** tab, click the **Editor**


tab.

The **Editor** tab opens.

2. In the **If** condition box, add an Inventory or Segment by clicking on the downward arrow.

i Note: If you create a condition based on segment then segment type is the value of the class attribute in the Segment repository. Segment ID is the ID of the segment record created against that segment type.

3. Select the Operator and Product.
4. Click the drop-down arrow icon  to **< > Add Group**.

5. Click the drop-down arrow icon  to **< > Add Condition** and enter the values for the necessary fields. You can add multiple conditions and groups as required.

6. Click **Finalize**.

Cloning a Rule

Rules can be cloned from any state. To clone an existing rule, perform the following steps:

Procedure

1. Log in to the Order and Pricing Designer.
2. Click on **Rules**.

The **Rules List** page is displayed.

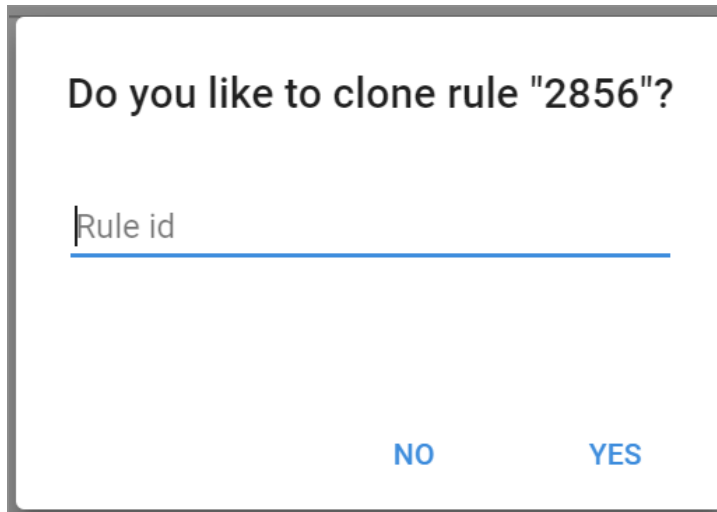
3. Click the  icon to clone the rule.

A dialog box is displayed requesting a new **Rule ID**.

4. Enter the new **Rule ID** and click **Yes**.

A new rule, cloned from the existing rule, is created. By default, the status of the cloned rule is **Draft**.

Cloning Dialog Box



Do you like to clone rule "2856"?

Rule id

NO YES


Modifying a Rule

Before you begin

Ensure that the rule is in **Draft** or **Active** state. Rule in any other state cannot be modified. You must be familiar with the procedure to create a rule. See [Creating Rules](#) for more details.

Procedure

To modify an existing rule, perform the following steps:

1. Log in to the Order and Price Designer.
2. Click **Rules**.
The Rules List page is displayed.
3. Click the  icon.
The rule to be edited is displayed.
4. Make the necessary changes and click **Submit** after going through the **Details**, **Editor**, and **Finalize** tabs.
The rule is once again sent to the administrator for approval.

Enabling a Rule


An enabled rule is the one which is completely processed and ready to be used. A rule in the **Disabled** state can be enabled.

Procedure

1. Log in to the Order and Pricing Designer.

2. Click **Rules**.

The **Rules List** tab is displayed.

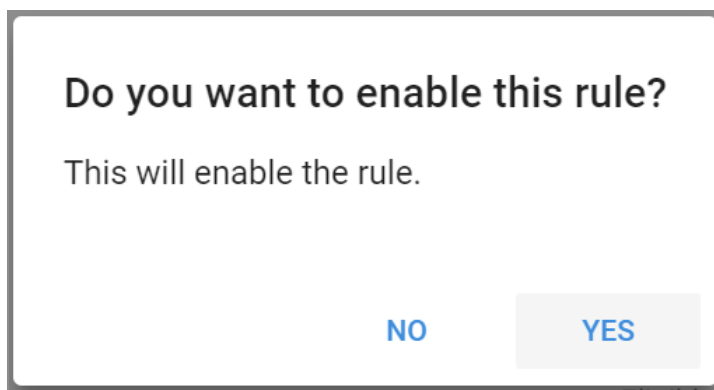
3. Filter the rules based on the **Disabled** status. See [Using Filters to Search for a Rule](#) topic for more details. Click  icon.

A confirmation window is displayed.

4. Click **Yes**.

The rule is enabled.

Enabling a Rule



Disabling a Rule


A disabled rule is not completely processed and cannot be used. A rule in the **Active** state can be disabled.

Procedure

1. Log in to Offer and Price Designer as an administrator.

2. Click on **Rules**.

The **Rules List** page is displayed.

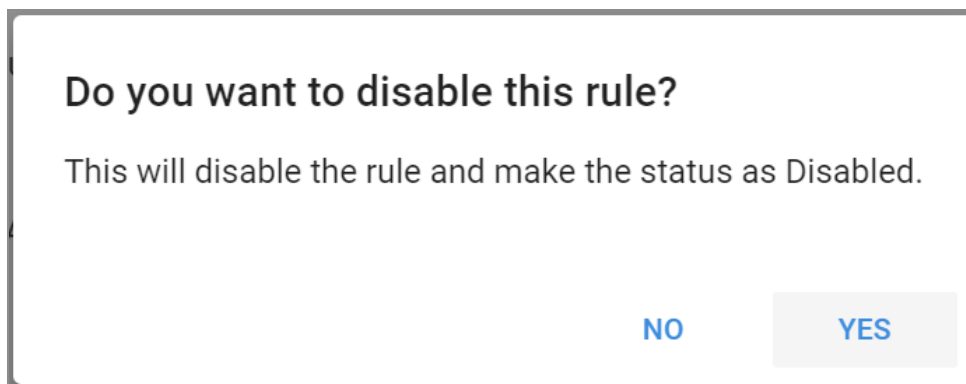
3. Filter the rules based on the **Active** status as only **Active** rules can be disabled. See [Using Filters to Search for a Rule](#) topic for more details. Click  icon.

A confirmation window is displayed.

4. Click **Yes**.

The rule is disabled.

Disabling a Rule




Deleting a Rule

To delete rule, perform the following steps:

i Note: A rule in **Pending Approval** status cannot be deleted. Only the rules in **Draft** and **Active** status can be deleted.

Procedure

1. Log in to the Order and Pricing Designer.
2. Click on **Rules**.
The **Rules List** page is displayed.
3. Click the  icon to delete the rule.

A dialog box is displayed asking if you want to delete the rule.

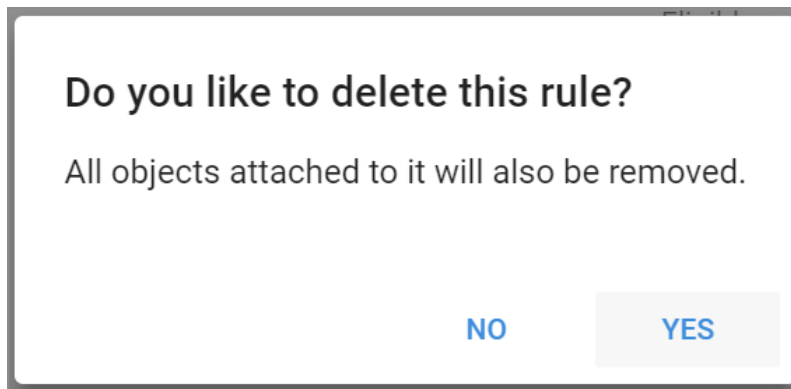
4. Click **Yes**.

The rule is removed from the list and a work item is created.

5. Log in to the Order and Pricing Designer as an administrator and approve the deletion request of the rule.

The rule is deleted.

Deleting a Rule



Searching for Rules

You can search for rules based on the following criteria:

- [Searching for a Rule by Using Filters](#)
- [Searching for a Rule by Using Keywords](#)

Searching for a Rule by Using Filters

You can use filters based on Type and Status to retrieve a rule. For using filters, perform the following steps:


Procedure

1. Log in to the Order and Price Designer.

The Offer List page is displayed.

2. Click **Rules**.

The **Rules List** tab is displayed.

3. Click the  icon.

The **Type** and **Status** fields are displayed.

4. If you do not know the name of the rule you are searching for, you can filter the list of rules using the following parameters:

Field	Description
Type	The choices are: <ul style="list-style-type: none">• Eligible• Ineligible• Incompatible
Status	The choices are: <ul style="list-style-type: none">• Draft• Any• Pending Approval• Active• Disabled• Rejected

The list of rules based on the filters used is displayed.



5. Click the  icon again.

This removes the filtering criteria and displays the complete rule list.

Searching for a Rule by Using Keywords

You can search for rules based on Rule ID and Rule name. To search for an existing rule, perform the following steps:

Procedure

1. Log in to the Order and Price Designer.
The Offer List page is displayed.
2. Click **Rules**.
The **Rules List** tab is displayed.
3. Click the  icon.
The search field for **Rule ID** and **Rule Name** is displayed.
4. Enter the ID or name of the rule in the **ID Search** or **Name Search** text boxes respectively.
The list of rules similar to the entered name or ID is displayed.
5. Click the  icon to remove the search criteria and view the entire rules list again.

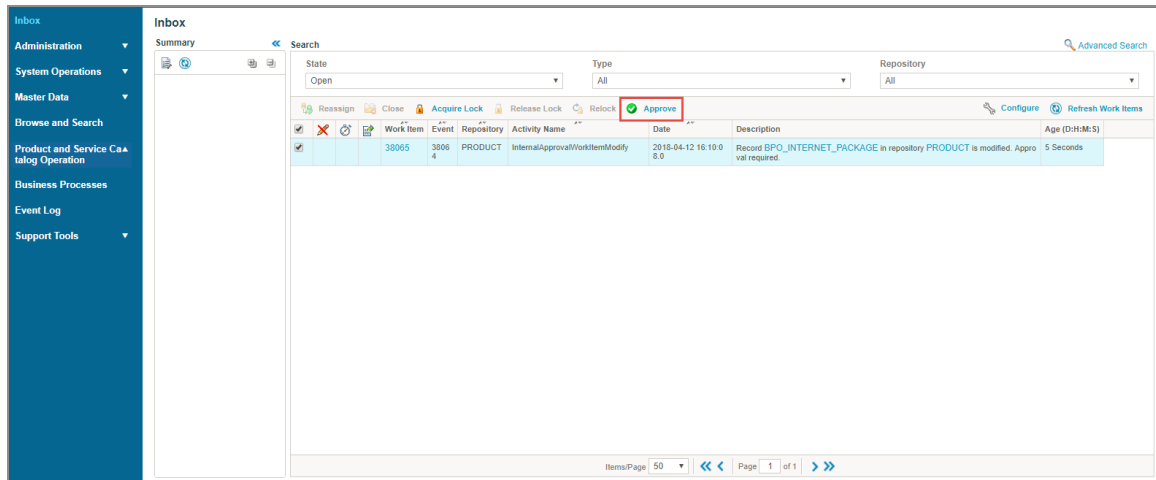
Approving a Rule Using the TIBCO Product and Service Catalog System

Only a user with administrator role can approve a rule for its activation.
To approve a rule for its activation, perform the following steps:

Procedure

1. Log in to the TIBCO Product and Service Catalog system by using administrator credentials.
2. Click the **Inbox** menu.
3. On the **Inbox** page, select the rule you want to activate and click **Approve**.
4. In the Confirmation window, click **Yes** to confirm the approval. The status of the rule changes to **Active**.


Approving a Rule



Approving a Rule Using Offer and Price Designer

A rule once created, is submitted for approval to the administrator. The administrator may then approve or reject the rule after checking its viability. A rule is in the **Pending Approval** state before it gets approved or rejected.

Procedure

1. Log in to Offer and Price Designer as an administrator.
2. Click on **Rules**.
The **Rules List** page is displayed.
3. The **Rules List** contains the rules with the status **Pending Approval**. Click .
A confirmation window is displayed.
4. Enter the comment for approving the rule and click **Yes**.
The rule is approved and the status changes to **Active**.

Approving a Rule

Do you like to approve rule "007_JB"?


Comment

NO YES

Rejecting a Rule

A rule once created, is submitted for approval to the administrator. The administrator may then approve or reject the rule after checking its viability. A rule is in the **Pending Approval** state before it gets approved or rejected.

Procedure

1. Log in to Offer and Price Designer as an administrator.
2. Click on **Rules**.
The **Rules List** page is displayed.
3. The **Rules List** contains the rules with the status **Pending Approval**. Click .
A confirmation window is displayed.
4. Enter the comment for rejecting the rule and click **Yes**.
The rule is rejected and the status changes to **Rejected**.

Rejecting a Rule

Do you like to reject rule "007_JB"?

Comment

NO YES

Logging out of Offer and Price Designer

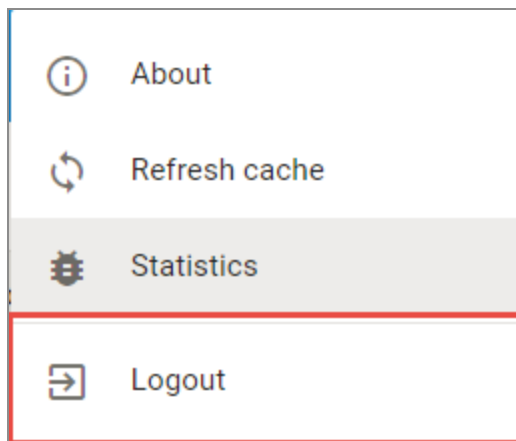
To log out from Offer and Price Designer, perform the following steps:

Procedure

1. Click the **Profile** drop-down menu.
2. Click **Logout**.

Your session in the *Offer and Price Designer* system is terminated.

Logging out of Offer and Price Designer



TIBCO Documentation and Support Services

For information about this product, you can read the documentation, contact TIBCO Support, and join TIBCO Community.

How to Access TIBCO Documentation

Documentation for TIBCO products is available on the [TIBCO Product Documentation](#) website, mainly in HTML and PDF formats.

The [TIBCO Product Documentation](#) website is updated frequently and is more current than any other documentation included with the product.

Product-Specific Documentation

The following documentation for TIBCO® Product and Service Catalog is available on the [TIBCO® Product and Service Catalog Product Documentation](#) page.

- *TIBCO® Product and Service Catalog Release Notes*
- *TIBCO® Product and Service Catalog Installation and Configuration*
- *TIBCO® Product and Service Catalog Product Catalog Guide*
- *TIBCO® Product and Service Catalog User Guide*
- *TIBCO® Product and Service Catalog Web Services*
- *TIBCO® Product and Service Catalog Offer and Price Designer User Guide*
- *TIBCO® Product and Service Catalog Cloud Deployment*
- *TIBCO® Product and Service Catalog Security Guidelines*

How to Contact TIBCO Support

Get an overview of [TIBCO Support](#). You can contact TIBCO Support in the following ways:

- For accessing the Support Knowledge Base and getting personalized content about products you are interested in, visit the [TIBCO Support](#) website.

- For creating a Support case, you must have a valid maintenance or support contract with TIBCO. You also need a user name and password to log in to [TIBCO Support](#) website. If you do not have a user name, you can request one by clicking **Register** on the website.

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