



Pricing Oversight Policy – Configuration Steps

This document outlines the steps required to create and configure a **Pricing Oversight Policy**, including the setup of policy headers, policy lines, and enabling validation.

1. Create a Pricing Oversight Policy Header

The **Policy Header** defines the overall scope, validity, and identification of the pricing policy.

Steps:

1. Navigate to **Pricing Oversight Policies**.
2. Select **New** to create a new policy.
3. Complete the following fields:
 - **Code** - A unique identifier for the policy.
 - **Description** - A clear description of the purpose of the policy (e.g., "Standard Wholesale Pricing Controls").
 - **Start Date** - The date from which the policy becomes effective.
 - **End Date (Optional)** - The date on which the policy expires. Leave blank if the policy should remain active indefinitely.
4. Save the Policy Header.

2. Create Pricing Oversight Policy Lines

Policy Lines define the specific pricing, margin, or discount rules enforced by the policy.

Each policy can contain one or more policy lines.

Steps:

1. From the Pricing Oversight Policy Header, navigate to **Policy Lines**.
2. Select **New Line**.
3. Configure the following fields:



Applied To

Determines the entity the rule applies to. Select one of the following:

- **Customer**
- **Customer Price Group**
- **Item**
- **Item Category**

No.

Specify the record related to the selected **Applied To** option:

- Customer No.
- Customer Price Group Code
- Item No.
- Item Category Code

Rule Type

Defines the type of pricing control applied:

- **Margin** – Enforces minimum margin requirements
- **Price** – Enforces minimum unit price requirements
- **Discount** – Enforces maximum discount limits

Currency Code

Specify the currency the rule applies to. Leave blank if the rule applies to the local currency.

Threshold Fields

Populate the relevant threshold fields based on the selected **Rule Type**:

- **Minimum Unit Price** - The lowest allowed unit price.
- **Maximum Discount %** - The maximum allowable discount percentage.
- **Minimum Margin %** - The minimum required margin percentage.

Note: Only populate the threshold fields relevant to the selected Rule Type.

4. Repeat these steps to add additional policy lines as required.



3. Enable the Pricing Oversight Policy

Once all policy lines have been configured, the policy must be enabled.

Steps:

1. Return to the **Policy Header**.
2. Select **Enable Policy**.

Validation Performed on Enable:

When enabling the policy, the system will automatically validate all configured policy lines to ensure:

- All mandatory fields are populated.
- The **Applied To** and **No.** values are consistent.
- The selected **Rule Type** has the appropriate threshold fields configured.
- Currency Code usage is valid.

If any validation errors are found, the policy will not be enabled until all issues are corrected.

4. Policy Status

- **Disabled** – Policy exists but is not enforced.
- **Enabled** – Policy is active and pricing rules are enforced according to the configured policy lines.

Summary

A Pricing Oversight Policy consists of:

- A **Policy Header** defining scope and validity.
- One or more **Policy Lines** defining pricing, discount, or margin enforcement rules.
- An **Enable step** that validates configuration integrity before enforcement.

Proper configuration ensures consistent pricing governance and compliance across customers, items, and price groups.