MFG-25 Set-up and Maintain Pricing Strategies and Assign Strategies

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of how to Set Up and Maintain Pricing Strategies and Assign Strategies in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of assigning the correct strategies to deliver tailored pricing by systematically grouping records and applying the most appropriate pricing rules.

Manage Pricing Strategies

There are 9 steps to complete this process.

Step 1. From the Home screen, click the **Order Management** tab.

Step 2. Click on **Pricing Administration**.

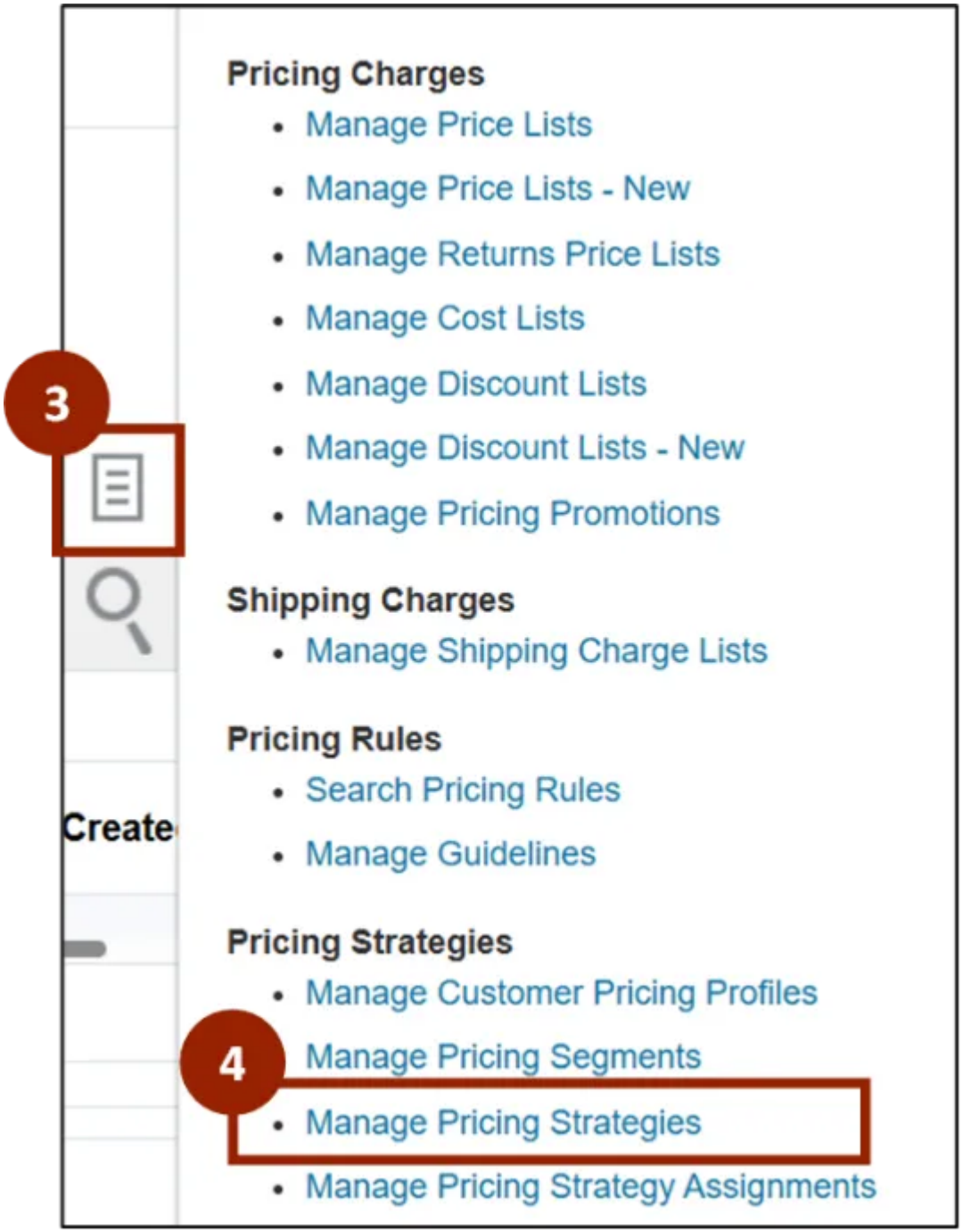
Image



Step 3. Click the **Task** icon.

Step 4. Within the Pricing Strategies section, Click **Manage Pricing Strategies**.

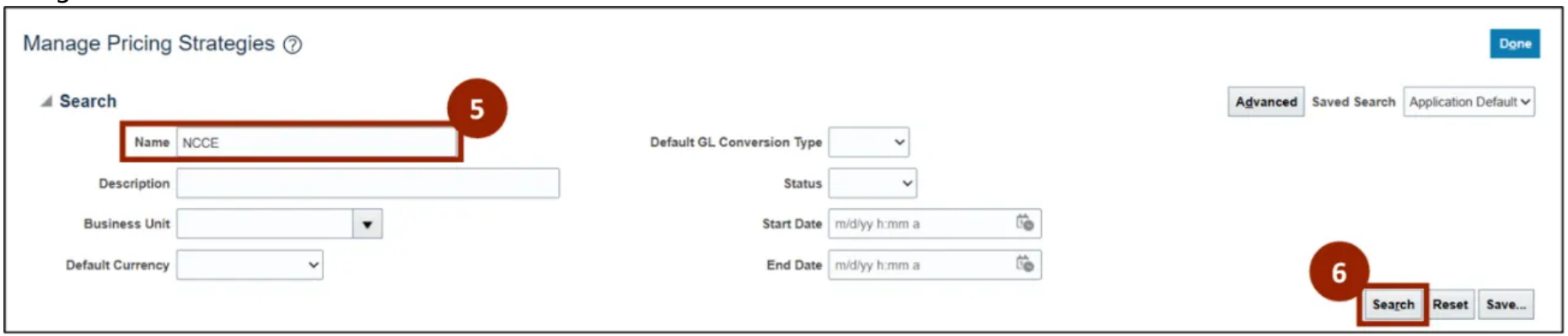
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Pricing Charges
Manage Price Lists
Manage Price Lists - New
Manage Returns Price Lists
Manage Cost Lists
Manage Discount Lists
Manage Discount Lists - New
Manage Pricing Promotions
3
Shipping Charges
Manage Shipping Charge Lists
Pricing Rules
Search Pricing Rules
Manage Guidelines
Create
Pricing Strategies
Manage Customer Pricing Profiles
Manage Pricing Segments
4
Manage Pricing Strategies
Manage Pricing Strategy Assignments

Step 5. In the Name field, enter **NCCE**.

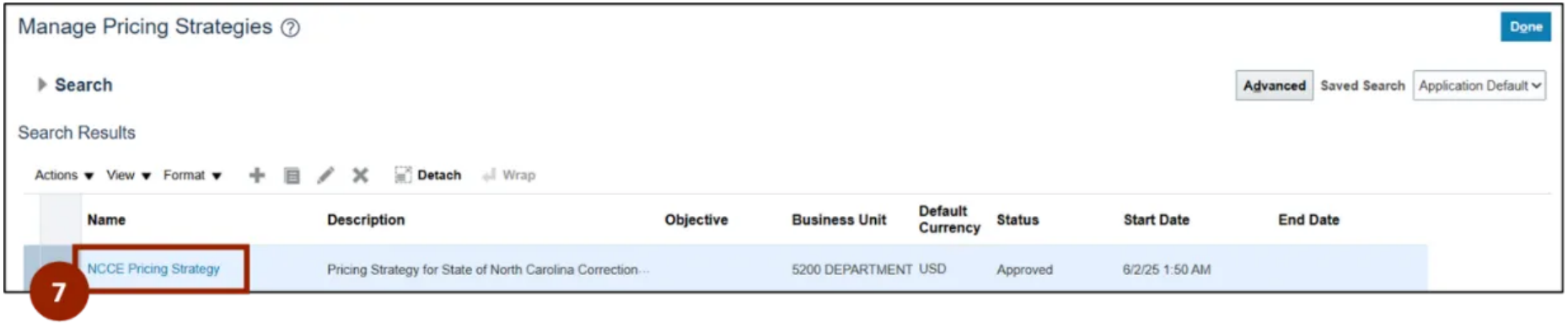
Step 6. Select the **Search** button.

Image



Step 7. Under the Search Results section within the Name column, click the **NCCE Pricing Strategy** link.

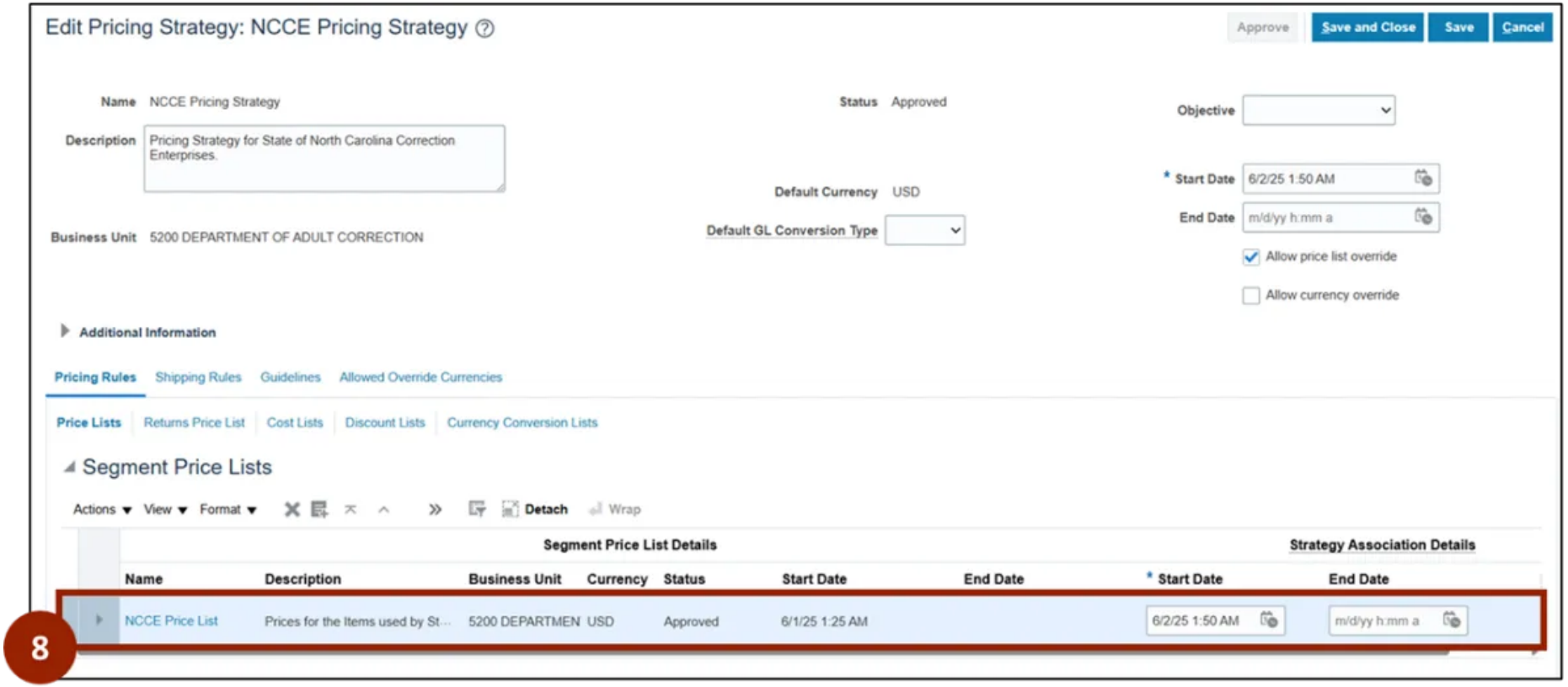
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Step 8. The Edit Pricing Strategy: NCCE Pricing Strategy screen displays, review the **associated Price List**.

Note: The NCCE Price List link opens the Edit Price List: NCCE Price List screen within a new tab.

Image

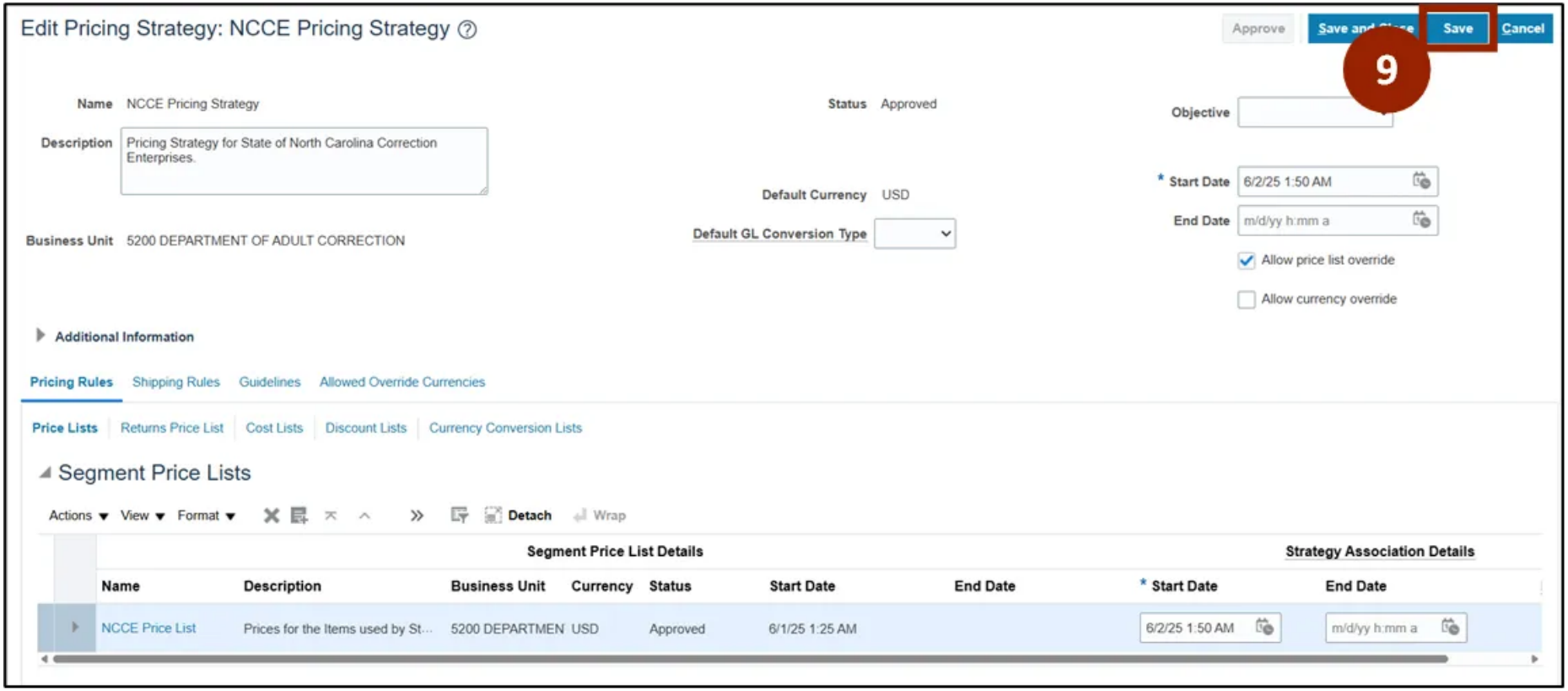


Note: Depending on your assigned Pricing Strategy, the associated Price List may vary or not yet display.

Step 9. If any changes are made to the unlocked fields, click the **Save** button within the Edit Price List screen to apply your updates.

Note: Unlocked fields within the Edit Pricing Strategy: NCCE Pricing Strategy screen may be updated, as needed.

Image



Manage Pricing Strategy Assignments

There are 8 steps to complete this process.

Step 1. From the Home screen, click the **Order Management** tab.

Step 2. Click on **Pricing Administration**.

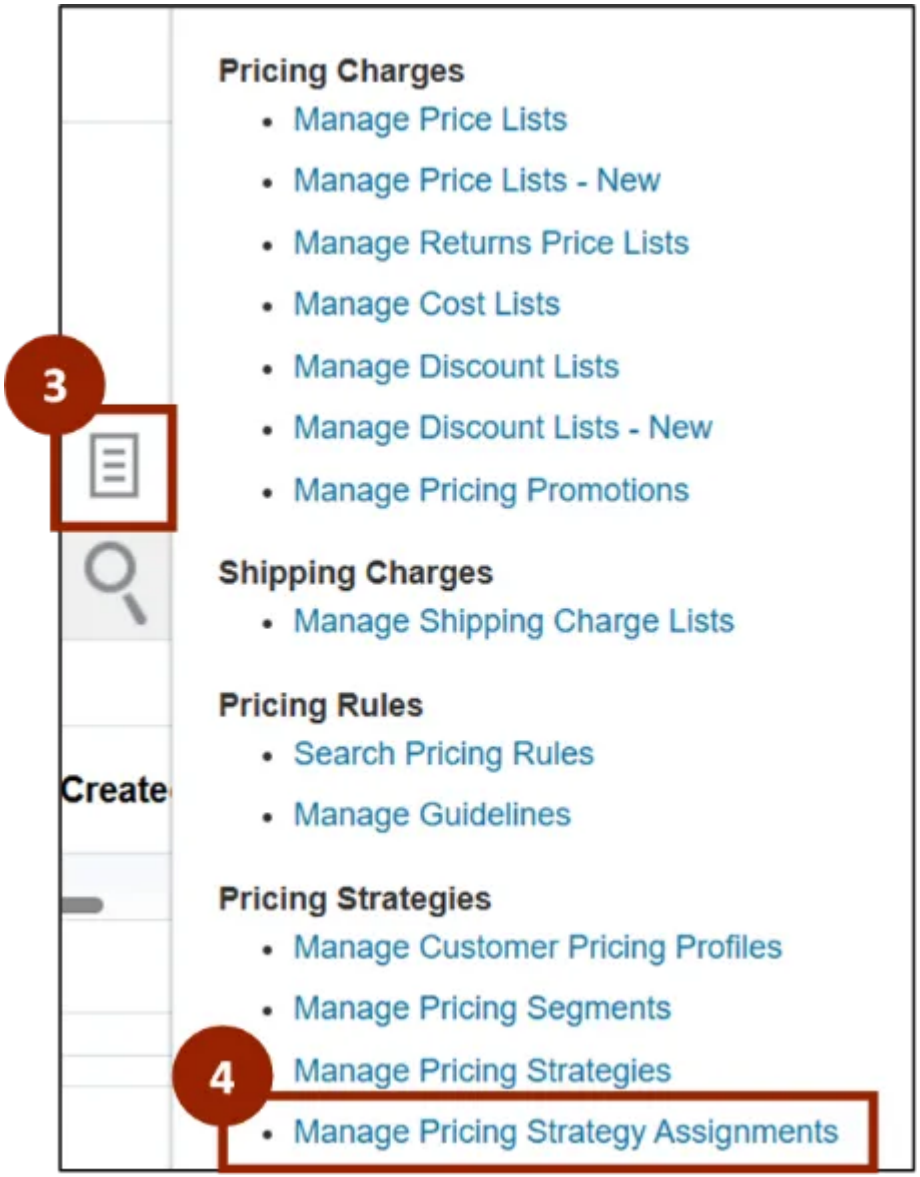
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Step 3. Click the **Task** icon.

Step 4. Within the Pricing Strategies section, click **Manage Pricing Strategy Assignments**.

Image

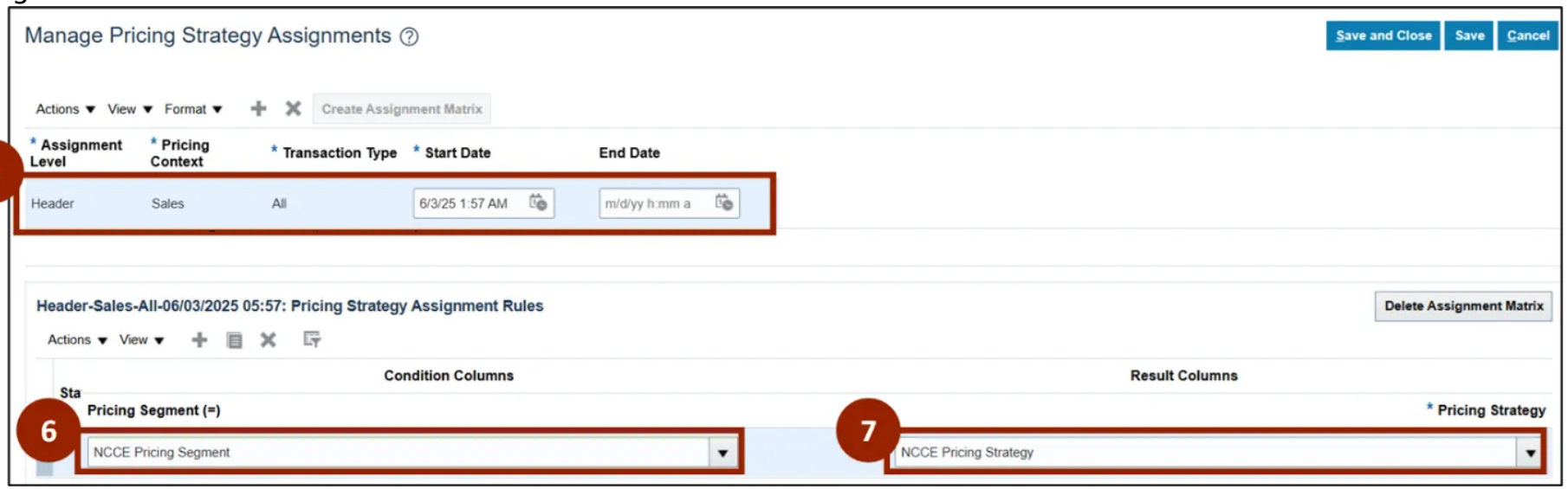


Step 5. Review the Assignment Matrix.

Step 6. Under the Pricing Strategy Assignment Rules section in the Pricing Segment field, verify the **NCCE Pricing Segment** is selected.

Step 7. In the Pricing Strategy field, verify the **NCCE Pricing Strategy** is selected.

Image



Note: For DAC the only available Pricing Strategy is the NCCE Pricing Strategy. If additional strategies are introduced in the future, you can add new rows to define them by clicking the **Actions** drop-down then select **Add Row**, or by clicking the **Plus (+)** icon in the Pricing Strategy Assignment Rules table.

Image



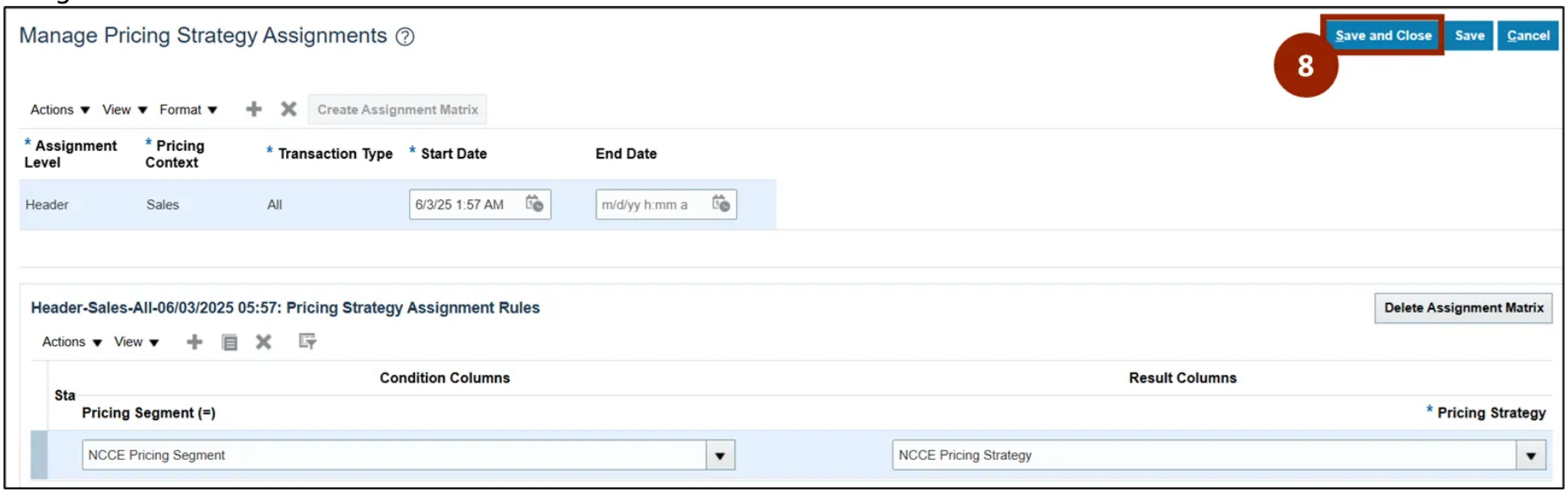
Image



Step 8. If any changes are made to the unlocked fields, click the **Save and Close** button.

Note: Unlocked fields within the Manage Pricing Strategy screen may be updated, as needed.

Image



Pricing Strategy and Segment in Sales Order

There are 9 steps to complete this process.

Step 1. Click the **Company Single Sign-On (SSO)** button.

Step 2. Enter your **@dac.nc.gov** email address.

Step 3. Click **Next,** then enter your **password**.

Step 4. On the Home page, select the **Order Management** tab.

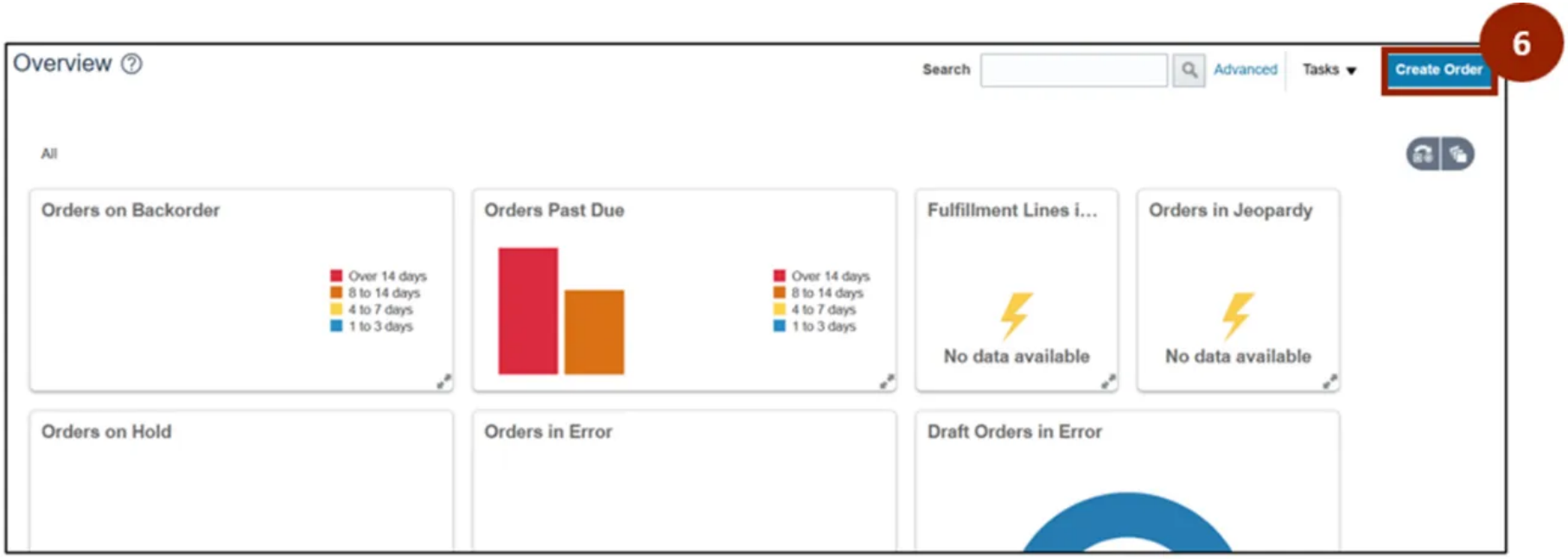
Step 5. Click **Order Management** App.

Image



Step 6. Click the **Create Order** button.

Image



Step 7. From the Create Order screen, click the **Actions** drop-down.

Step 8. Click on **View Pricing Strategy and Segment**.

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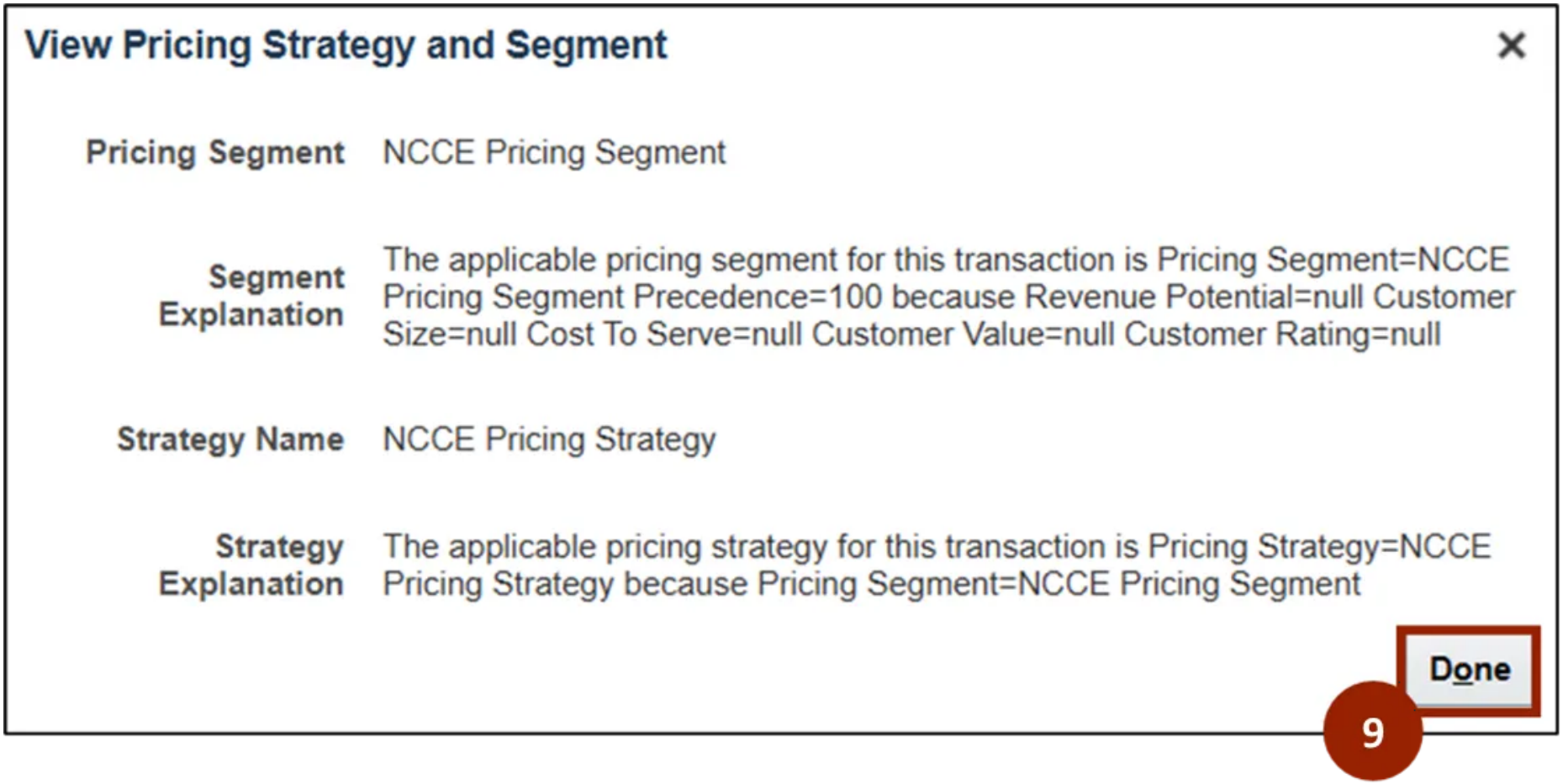


Note: The View Pricing Strategy and Segment screen displays the defaulted **NCCE Pricing Segment** and the **NCCE Pricing Strategy**.

Step 9. Once you have reviewed the details in the View Pricing Strategy and Segment screen, click **Done** to close.

Note: This is an optional validation step for the CSR during sales order entry. This screenshot below shows the **Price Segment** and **Price Strategy** that have been defined for DAC and are properly configured in the NCFS system.

Image



Wrap-Up

NCFS users can set up and maintain pricing strategies and assign strategies using the steps above.

Additional Resources

- Instructor Led Training (ILT)

    - MFG116 – Maintain Pricing
- Web-based Training (WBT)
    - MFG100: Introduction to NCFS Manufacturing
    - MFG101: The Journey Through NCFS Manufacturing

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