

IBM Dynamic Pricing Documentation

IBM

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Chapter 1. What's new

If you need information about what is new in the IBM Dynamic Pricing release, you can find it here.

New trial offering

You can now evaluate IBM Dynamic Pricing before you purchase a subscription. Sample data is provided for you to work with and create pricing strategies. Additionally, you can also import your own data into the software to personalize your evaluation experience.

New Manage data feature

The **Manage data** feature provides an interface to work with the data that is used to create pricing strategies. Sample data is provided within the application for trial purposes. You can also use the **Manage data** feature to import your own data and to switch between which dataset is active.

Chapter 2. Getting started

As a new user, you will find many interesting topics that will help you gain understanding and get started using IBM Dynamic Pricing.

Overview

IBM Dynamic Pricing helps retailers respond to changes in competitive prices, product demand, and market conditions.

Dynamic Pricing:

- Is a part of the IBM® Commerce portfolio.
- Provides a way to determine the optimal pricing strategy to achieve your business goals.
- Provides the ability to check the performance of each strategy and take action.
- Provides quick access to the key metrics of your business.
- Provides various types of rules that you can apply to product groups.
- Is easy to navigate and easy to learn.

Web browsers supported

For the features in IBM Dynamic Pricing to work properly, you must use a supported web browser.

The following browsers are supported:

- Google Chrome version 41 and later
- Mozilla Firefox version 36 and later
- Microsoft Edge for Windows 10
- Apple Safari for Mac
- Mobile Chrome on iOS and Android
- Mobile Safari on iOS for the iPhone and iPad

User interface icons quick reference

There are many icons used in the IBM Dynamic Pricing user interface. You can use this quick reference to get familiar with the icons.

Table 1. Icons and definitions













Icon	Name	Usage
	Product menu or Hamburger menu	Click this icon to expand the product application navigation.
	Menu	Click this icon to perform tasks.
	Help	Click this icon to access items in the Help.
	Edit	Click this icon to edit an object.

Table 1. Icons and definitions (continued)

Icon	Name	Usage
	Magnifying glass	Click this icon to perform a search.
	Profile	Click this icon to update your profile or to log out.
	Table	Click this icon to display the information in a tabular format.
	Tiles	Click this icon to display information in a tile format.
	Open	Click this icon to open the pricing strategy
	Time selection handle	Click and drag this icon to adjust the time frame in Pricing strategy trends.
	Add or remove	Click to add or remove competitors from the Pricing strategy trends data.
	Grip	Use the Grip icon to change the order of the rules.

Logins and passwords

You need a login and password to use IBM Dynamic Pricing. Please contact the system administrator to obtain a user account and password.

To obtain a login and password , visit <http://www.ibm.com> and sign in to your IBM profile. If you do not have an existing profile, select **Create an IBMid** and follow the directions on the screen. Once you have an IBMid, provide the IBMid email address to your IBM Dynamic Pricing trial instance owner so that you can be added to the IBM Dynamic Pricing instance as a user.

Logging in

Use this procedure to log in to IBM Dynamic Pricing.

Before you begin

To obtain a login and password , visit <http://www.ibm.com> and sign in to your IBM profile. If you do not have an existing profile, select **Create an IBMid** and follow the directions on the screen. Once you have an IBMid, provide the IBMid email address to your IBM Dynamic Pricing trial instance owner so that you can be added to the IBM Dynamic Pricing instance as a user.

Procedure

1. Go to the URL for your IBM Dynamic Pricing instance. The IBM Commerce Omni-Channel Merchandising login page displays.

2. Enter your **User name**.
3. Enter your **Password**.
4. Click **Log in**. The IBM Commerce Omni-Channel Merchandising system displays.
5. To access Dynamic Pricing, select **Home > Dynamic Pricing**.

Logging out

Use this procedure to log out of IBM Dynamic Pricing.

Procedure

1. Select your **User name**. A drop-down menu displays.
2. Select **Logout**.

Requesting a password reset

Use this procedure to request a new password, if you forgot your password.

Procedure

1. Go to the URL for IBM Commerce Omni-Channel Merchandising. The IBM Commerce Omni-Channel Merchandising log in page displays.
2. Enter your **User name**.
3. Click **Forgot your password?**
4. Enter your **User name**.
5. Click **Send New Password**. Follow the instructions that are provided in the email to reset your password.

Updating your profile

Use this procedure to update your user profile information. In your profile, you can update your name, language, and time zone.

Procedure

1. Click your **User name**. A drop-down menu displays.
2. Select **Profile**.
3. You can update:
 - **Full name**
 - **Language** - The language-selected updates the display language, time and date, and currency.
 - **Time zone**
4. Click **Save**.

Chapter 3. Key concepts

The key concept definitions apply to how the terms are used in IBM Dynamic Pricing.

Company

Company is the name of the parent corporation.

Division

A division is a subset of locations within a company.

Location

Location is a place where consumer purchases products.

A location may be an internet site or a physical store location.

Price zones

Price zones are a group of stores that belong to the same zone.

Product

Product is an article or substance that is for sale by your company.

Active strategy

An active strategy is a pricing strategy that you created and has a status of Active - Yes. The pricing strategy runs using the data you configured and the schedule you entered.

Inactive strategy

An inactive strategy is a pricing strategy that you created and has a status of Active - No. This pricing strategy is not collecting any data.

Manual approval threshold

As you create pricing strategies, you can mark the strategy for manual approval and you need to add a threshold value.

Pricing strategy trends

Pricing strategy trend data is data for a pricing strategies.

Trend data displays as:

- Time frame - volume by date
- KPI history - revenue, margin, margin % by volume and date
- KPI totals - unit volume, revenue, and margin

- Unit volume break down - year, quarter, month, and day
- Competitors

Real-time pricing

Real-time pricing is the ability to adjust prices immediately regardless of the time of day.

Scheduled pricing

Scheduled pricing runs the strategy by the schedule you created.

Threshold

Threshold is a user defined level that when exceeded triggers a pricing action.

Pricing rules

Pricing rules enable you to enforce certain rules within a pricing strategy. Rules are applied to the products in pricing strategy in the order in which they appear in the pricing strategy. Rules can be applied to a subset of products by using filters within a rule.

Pricing rules can be grouped into two groups: price movement rules and relationship rules.

Price movement rules include:

- Brand rule
- Competitor rule
- Cross channel rule
- Cross zone rule
- Line price rule
- Size rule

Relationship rules are:

- Dollar ending rule
- Gross margin % rule
- Last digits rule
- MAP rule
- Preset price rule
- Price rule - SKU limits rule
- Price rule - product group rule
- Profit rule
- Small price change rule
- Unit gross margin rule
- Volume weighted CPI rule

After you add the rule to your pricing strategy, you select rule settings to customize the rule. Additionally, you can:

- Duplicate rules
- Delete rules

- Mark rules as important

Brand rule

A brand rule establishes pricing relationships between private label brands (store brand) and national brands.

You should understand these terms and your data needs to have these attributes:

- **Brand family:** Common identifier that relates products together. Example: AA Batteries
- **Brand class:** Defines the actual brand. Example: National brand, Private label - store brand.

Rule usage:

National brands are always more expensive than private brands.

Competitor rule

A competitor rule allows you to enforce rules that ensure that prices are competitive.

You choose how the retail price compares to the competitors price. And you also choose what prices you are comparing to and how much historical data to use in the calculation:

- **latest** updated price
- **minimum** of historical prices over the last X days
- **average** of historical prices over the last X days
- **mode** of historical prices over the last X days

For example, you could impose a rule that says prices of cereals are within 5% of competitor prices, using the latest updated prices.

Cross channel rule

Cross channel rules allows you to set a relationship for products between two channels.

Cross zone rule

Cross zone rules limits the price range for products in a product group and zone, relative to the same products in a different zone within the same zone group.

Dollar ending rule

Dollar ending rules limit the dollars part of the price to end in certain numbers only based on the entered price range.

Gross margin % rule

Gross margin % rules requires optimization results to be within a customer defined gross margin range.

Last digits rule

Last digits rules limits the cents part of the price to end only in certain numbers based on the entered price range.

Line price rule

Line price rule allows you to consistently price different colors, flavors, scents or sizes of the same product.

Before you can use this rule, the line groups must be attributed in the database.

Rule definition:

For products in the same line family their price should be the same.

Rule usage examples:

- All colors and sizes from small to XL of a men's polo shirt should be priced the same
- Specific brand of shampoo in a 12 oz size and the Shampoo 12 oz + a free 3 oz should be priced the same

MAP rule

MAP (Minimum Advertised Price) rules enforce the minimum allowed price for a product.

Preset price rule

The Preset price rule enforces pre-pricing.

Weights and measure regulations can restrict retailers from deviating higher than prices stamped directly on the product. Pre-pricing stops price movement on marked products during optimizations. This rule is a Golden Rule.

Profit rule

Profit rules determine the minimum percentage increase of profit for each product group zone.

Product group rule

Product group rule limits the amount of price changes within a defined product group for each product in the product group.

Price rule - product group limit

The Price rule - Product Group Limits rule limits the amount that prices can move for any product in all stores or in a specific store group.

The rule can be used to limit product price changes on a smaller group of products than a category.

The prices can be either average weighted prices (for example, the average price of products cannot increase), absolute price rules (for example, a specific product must be \$.44), or relative price rules (for example, prices should not drop by more than \$1 or increase by more than \$.50).

Price rule - SKU limits rule

SKU limits rule limits the amount a single product can increase or decrease during optimizations and is applied at the pricing strategy level.

Size rule

Size rules create predefined relationships between two similar products based on their respective volumes, weights, or counts.

Small price change rule

Small price change ruled restrict price changes to occur for each product during optimization, if the price changes fall within a specified amount.

For example, the rule states, do not allow retail price changes between \$.05 and \$.10 (or a percentage). The final price reverts to current price if the new price were to change by a specified amount.

Unit gross margin rule

Unit gross margin limits the Unit Gross Margin \$ range for each product within a product group in a specific store group.

For example, The Unit Gross Margin \$ of each product must be at least \$.10.

Volume weighted CPI rule

Volume-weighted CPI rules limit the price range for each product within a product group in a specific store group, so that an index created from a comparison of the average prices of the product group to the average of a competitor product group does not exceed the specified amount.

Optimization rules

Optimization rules are used to maximize profit, revenue, and volume for products.

Maximize profit rule

The maximize profit rule is used to optimize the profit for the pricing strategy.

Maximize revenue rule

The maximize revenue rule is used to optimize the revenue for the pricing strategy.

Max volume rule

The maximum volume rule is used to optimize the volume for the pricing strategy.

Chapter 4. Managing your product data

IBM Dynamic Pricing provides an interface for you to work with your product data. Sample data is provided for you or you can import your own data. Once you have imported your data, you can view and filter the data and begin using basic price recommendation functionality.

Navigate to the Manage data screen to access your product data.

1. Select the menu icon.
2. Expand the **Data** menu item.
3. Select **Manage**.

The following data is required to provide basic price recommendations.

- Products
- Locations
- Price zones
- Current costs
- Current prices
- Competitor prices
- Statuses

Optionally you can also use the following data types to extend pricing and reporting capabilities.

- Families
- Inventory
- Taxes
- Attributes
- Sales

Adding a dataset

From the **Manage Data** screen, you can import a dataset for use in calculating pricing strategies and to build reports.

Before you begin

Before importing your data, make sure that no cells are formatted using the scientific format (E + n). It is recommended to format your table cells as text.

Note: The import process requires the comma delimiters to properly format the data. Some versions of Microsoft Excel will remove comma delimiters when saving data to a .CSV file. Refer to your Microsoft Excel documentation if your .CSV file is not including comma delimiters.

Procedure

1. From the **Manage Data** screen, locate the data type that you want to enhance.
2. Select **Add data**. If no data has previously been added, select **Add data to get started**.

3. Prepare your data for importing by following the directions that are listed under **Products data specification**.
 - You can download an example of how the data should be formatted by selecting **Download specification**.
 - Select **Download template file to download** to download an editable .CSV file which you can use to format your data.

Note: Make sure that no cells are formatted by using the scientific format (E + n). It is recommended to format your table cells as text.

4. Select **Next** when you are ready to import your data.
5. Drag your data file into the area that is provided and click **Next** to continue. Optionally, you can click **browse to your file** to locate and select your import file. You can click the close icon to cancel the upload.

Note: The data file is tested for compatibility. A notification is displayed if an error is detected with the imported data.

6. Review the column mapping for your data file.
 - a. If your data file contains column headers, select **File has column header**. When you select **File has column header**, the first row of your data file is skipped during the import process so that column headers are not imported as part of your actual data.
 - b. Assign each column of your data file to a IBM Dynamic Pricing field. A message is displayed if a column is assigned to more than one IBM Dynamic Pricing field.
 - c. Select **Save mapping** to save your column mapping selections and to complete the import process. You can cancel the data import by selecting **Cancel**.

What to do next

Once the data is imported, you can work with the data and create pricing strategies. You can use the **Manage data** menu bar to switch between the provided sample data and your imported dataset.

Switching a dataset

Use the following procedure to select which dataset you want to manage.

About this task

If you have more than one dataset, you can select a desired dataset to be used for creating price strategies. Trial customers can switch between example data and their imported data.

Procedure

1. From the **Manage Data** screen, locate the dataset that is listed on the **Manage Data** menu bar.
2. Select the dataset, then select **Switch dataset**.
3. Select the dataset that you want to use; then, select **Switch**. The screen is refreshed using the selected dataset. You can now create pricing strategies using the data.

Chapter 5. Working with product data

IBM Dynamic Pricing provides an interface for you to work with your product data. You can view, import, export, download, and filter the data.

Your product data can be viewed and then downloaded using the following filters:

- Products
- Families
- Locations
- Price zones
- Statuses
- Attributes
- Current pricing for statuses, prices, costs, taxes, inventory, competitor prices, competitor prices buffer, and minimum advertised prices
- Historical data for price, cost, taxes, sales, and competitors price

Viewing product data

Use this procedure to view product data in the database.

Procedure

1. Select **Data**.
2. Select **Browse**. The list of data filters display.
3. Click the data filter you want to use. The data displays.

Exporting product data

Use this procedure to export product data, by family, from the IBM Dynamic Pricing database. The file is exported to a CSV file.

Procedure

1. Select **Product catalog**.
2. Click **Export**.
3. Leave **File type** as **Families**.
4. If you want to export all of the products listed, leave the **Include all products** check box selected. This is the default.
5. If you want to export specific products, deselect **Include all products** and then add product keys.
6. Click **Export**.
7. Click **Save**. The default file name is families.csv. Now you can make changes to this file and import it back into the application.

Importing product data

Use this procedure to import product data, by family, into the IBM Dynamic Pricing database.

Procedure

1. Select **Product catalog**.
2. Click **Import**.
3. Leave **File type** as **Families**.
4. Drag and drop the file from your desktop top to the **Import** panel. The file name displays.
5. Click **Import**. The import status window displays. The **Status** columns show you what percentage of the file has been imported. If you encounter any errors, the error messages is listed in the **Errors** column.
6. After the import has finished, click **Refresh** to manually update the data in your view.

Checking import status

Use this procedure to check to see if a file has been imported.

Procedure

1. Select **Product catalog**.
2. Click **Import**. The import status window displays. The status columns show you what percentage of the file has been imported. If you encounter any errors, the error messages is listed in the Errors column. Close this window after the file is imported.

Downloading data

Use this procedure to download product data from IBM Dynamic Pricing to a CSV file.

Procedure

1. Select **Data**.
2. Select **Browse**. The list of data filters display.
3. Select the data filter to use.
4. Click **Download**. The file type for the download is CSV.
5. Select **Save File**. The CSV file is downloaded.

Adding or removing columns

Use this procedure to add or remove columns that are displayed.

Procedure

1. Click **Columns**.
2. To search for a column to add or remove, enter the column name into the Search box and click the magnifier. The column name moves to the top of the list. The check box is checked for columns that are currently displayed.
 - To remove a column, deselect the box to the column name.
 - To add a column, select the box next to the column name.

Changing the column order

Use this procedure to change the order in which the columns display. Column order can be changed in the Data > Browse view or the Pricing Strategy > Prices view.

Procedure

1. Select the column heading for the column you want to move.
2. Drag the column to the new location.

Filtering data within a column

Use this procedure to filter and display pricing data in a column.

Procedure

1. Select **Data**.
2. Select **Browse**. The list of data objects display.
3. Select the data filter to use. The data is displayed in columns.
4. Select the column name that you want to filter on.
5. Select **Apply filter**.
6. Select the **Data field**.
7. Select the **Condition**.
8. Enter **Value**.
9. Click **OK**. The filtered data displays. The filter, you created, displays above the table. To remove the filter, click the X.

Hiding columns

Use this procedure to hide columns that are currently displayed.

Procedure

1. Select the column heading for the column you want to hide.
2. Click **Hide column**.

Sorting data in columns

Use this procedure to sort and display data from the IBM Dynamic Pricing database. You can sort a column in ascending or descending order.

Procedure

1. Select the **Data**
2. Select the **Browse**. The list of data objects display.
3. Select the filter you want to use. The data is displayed in columns.
4. Select the column name that you want to sort on.
5. Select **Sort ascending** or **Sort descending**. The filtered data displays. To remove the sorting, select the column again, and select **Remove sorting**.

Chapter 6. Working with pricing strategies

Pricing strategies are the key reason that you use IBM Dynamic Pricing. You can manage only price strategies that you created.

Pricing strategies can have a state of:

- **Active** - currently running strategies
- **Inactive** - created, but not actively running

You can filter pricing strategies by selecting a filter:

- **My strategies** are the strategies that you created. **My strategies** is the default filter.
- **My active strategies**
- **Active strategies**
- **Inactive strategies**
- **All strategies** includes both inactive and active strategies

You can:

- Create pricing strategies
- Update pricing strategies
- Activate pricing strategies
- Deactivate pricing strategies
- Delete pricing strategies
- Duplicate pricing strategies
- Run pricing strategies now
- Stop a pricing strategy that is running
- Download the last price strategy that was run
- Approve pricing
- Reject pricing

Each pricing strategy has three default rules applied:

- Line price rule
- Preset price rule
- Price rule - SKU limits

Creating pricing strategies

Use this procedure to create a new pricing strategy. Pricing strategies include products and product groups, pricing rules, schedules, and approvals.

Procedure

1. Select **Pricing strategies**.
2. Click **Create strategy**.
3. To enter the **General information** for this strategy, click **Edit**. Enter or select the following information and then click **Save**:
 - **Strategy name**

- **Comment**
 - **Price optimization**
 - **Locations**
4. Create or select a product group for the pricing strategy, click **Edit** for **Products**. After you create or select, click **Save**.
 5. To create the schedule for this pricing strategy, click **Edit** for **Schedule**. Enter or select the following and click **Save**.
 - **Timezone**
 - **Start on** - Date on which the strategy schedule starts
 - **Ends on** - If you do not enter an end time, the strategy will not have an end date.
 - If you want to schedule frequency, click the **Add scheduled run**, and select days and time.
 - If you want to use real-time pricing as soon as data arrives, select the **yes**.
 - Click **Save**
 6. To set up automatic or manual approval thresholds for this strategy, click **Edit** in **Approval settings**. Select one of the following and click **Save**.
 - **Automatic approve price changes which don't require manual approval**
 - **Add manual approval threshold**, enter the threshold value and then enter the manual approval information for when (daily, hourly, or weekly) and enter more or less in a percentage.
 7. Optional. To work with existing rules for this strategy, click **Edit** in **Price rules**. The default list of prices rules display. For each price rule listed, You can:
 - Update the rule - click **Edit**.
 - Mark the rule as important - click **Menu**, click **Mark as important**.
 - Duplicate a price rule - click **Menu**, click **Duplicate price rule**.
 - Delete a price rule from the strategy - click **Menu**, click **Delete price rule**.
 8. Optional. To add a new rule to the strategy, click **Edit** in **Price rules**:
 - Click **Create price rule**.
 - Select a rule.
 - Optional. Enter a new name for the rule.
 - Select the product group from either the product group drop-down list or use the product group displayed. At this time you can additional filters.
 - Select the competitor, you want to use in the rule.
 - Update the rules information displayed to customize the rule
 - Click **Save**. Your new rule displays in the rule list.
 - Click **Add inventory specific guideline** to apply inventory guidelines.
 - If the rule is broken, decide whether you want to do manual approval or not.
 - Click **Save**.
 9. Optional. You can change the order of which the rules are applied in the strategy by dragging and dropping the rules.
 10. Review all of the information you entered for this pricing strategy.
 11. To activate this strategy, click **Active**. The default is inactive.

Searching for pricing strategies

Use this procedure to search for a pricing strategy.

Procedure

1. Select **Pricing strategies**.
2. Enter the search criteria in the **Search** box. As you enter text, the search is active. Any pricing strategies that match your text display. The default search is across **My strategies**. To remove the search criteria, click X.

Updating pricing strategies

Use this procedure to update a pricing strategy that you created. You can update products and product groups, pricing rules, schedules, and approvals.

Procedure

1. Select **Pricing strategies**.
2. Find the strategy that you want to update.
3. Click **Menu**.
4. Select **Strategy definition**.
5. To update the **General information** for this strategy, click **Edit**. Make any updates and then click **Save**.
6. To update the **Product group** for this strategy, click **Edit**. Make any updates and then click **Save**.
7. To update the **Schedule** for this strategy, click **Edit**. Make any updates and then click **Save**.
8. To update the approval settings, click **Edit**. Make any updates and then click **Save**.
9. To update the **Price rules** applied to this strategy, click **Edit**. Make any updates and then click **Save**.

Activating pricing strategies

Use this procedure to activate an inactive pricing strategy that you created.

Procedure

1. Select **Pricing strategies**.
2. Select **Inactive strategies** from the **Strategies** drop-down list. The inactive strategies display.
3. Find the strategy that you want to activate.
4. Select the strategy **Name** or select the **Expand** icon. The strategy displays.
5. Select **Active** to yes.

Deactivating pricing strategies

Use this procedure to deactivate an active pricing strategy that you created.

Procedure

1. Select **Pricing strategies**.
2. Select **My active strategies** from the **Strategies** drop-down list. All of the active strategies display.

3. Find the strategy that you want to deactivate.
4. Select the strategy **Name** or select the **Expand** icon. The strategy displays.
5. Select **Active** to no.

Deleting pricing strategies

Use this procedure to delete a pricing strategy that you created.

Procedure

1. Select **Pricing strategies**.
2. Select **All strategies** from the strategies drop-down list. All of the strategies display.
3. Find the strategy that you want to delete.
4. For that strategy, click **Menu**.
5. Select **Delete strategy**. A confirmation message displays.
6. Click **Delete** to delete the strategy.

Duplicating pricing strategies

Use this procedure to duplicate a pricing strategy that you created.

Procedure

1. Select **Pricing strategies**.
2. Select **All strategies**. The strategies display.
3. Find the strategy that you want to duplicate.
4. For that strategy, click **Menu**.
5. Select **Duplicate strategy**. The pricing strategy **Defenition** displays. The **Strategy name** is appended with **(copy)**.
6. Update the **Strategy name** in the **General information**.
7. Update any of the other strategy attributes.
8. Review the strategy status and update if needed.

Running a price strategy now

Use this procedure to run a pricing strategy now.

Procedure

1. Select **Pricing strategies**.
2. Select **Active strategies**. The active strategies display.
3. Find the strategy that you want to run now.
4. For that strategy, click **Menu**.
5. Select **Run strategy now**.

Stopping a pricing strategy that is running

Use this procedure to stop a pricing strategy that is running.

Procedure

1. For the strategy that is running, click **Menu**.
2. Select **Stop strategy run**.

Creating product groups by uploading an excel file

Use this procedure to create a product group to be used in a pricing strategy using an excel file that contains product keys.

About this task

A product group is created during the pricing strategy creation. This task only shows the product group creation using an excel file.

Procedure

1. Click **Edit** for **Products**.
2. Select **Create new product group** as the **Product group**.
3. Drag a file from your desktop on to **Add filter**. For example, the file would be an Excel file that contains the product keys for the products you want to have this strategy run against.
4. Click **OK**.
5. If you want, you can add additional filters.
6. If you want to share this product group, so that you can use it in other strategies, click **Share this product group** and enter the **Product group name**. Any product groups that you create are only available to this strategy, unless you share it.

Creating product groups using filters

Use this procedure to create a product group to be used in a pricing strategy by using filters. A product group is created during the pricing strategy creation. This task only shows the product group creation.


Procedure

1. Click **Edit** for **Products**.
2. Select **Create new product group** in **Product group**.
3. Click **+Add filter**.
4. Select the filter type. Select one of the following:
 - Static filter
 - Product attribute
 - Web metricsProduct attribute filter displays.
5. Select the **Operator**.
6. Enter the **Value**.
7. Click **OK**. The information displays in the filter. If you want to see the results of the filter, click **Preview products**.
8. You can add additional filters if needed. Your choices are to **Add filter** or **Add filter group**. Add a filter is and AND function, where Add filter group is a OR function.
9. If you want to share this product group, so that you can use it in other strategies, click **Share this product group** and enter the **Product group name**. Any product groups that you create are only available to this strategy, unless you share it.

Changing the order of pricing rules

Use this procedure to change the order in which pricing rules are applied to a price strategy.

Procedure

1. Select **Pricing strategies**.
2. Select **My strategies** from the **Strategies** drop-down list. The strategies display.
3. Find the strategy in which you want to update the rule order.
4. Select **Open** icon for the strategy; then, select **Strategy definition**.
5. Select the **Definition** tab.
6. Select **Edit** next to **Price rules**.
7. within the list.
8. Drag and drop the rule to a new place in the list. Use the grip icon  that is next to the rule that you want to move.

Editing a rule in a pricing strategy

Use this procedure to edit a rule that you have already added to a pricing strategy.

Procedure

1. Select **Pricing strategies**.
2. Find the strategy that you want to edit. Open the strategy.
3. Select **Definition**.
4. Within the **Price rules** panel, click on the rule name. For example, you want to update the Dollar ending rule, click **Dollar ending rule**. The rule panel opens.
5. Make edits to the rule.
6. Click **Save** when finished.

Deleting a rule in a pricing strategy

Use this procedure to delete a rule that you have already added to a pricing strategy.

Procedure

1. Select **Pricing strategies**.
2. Find the strategy that you want to edit. Open the strategy.
3. Select **Defenition**.
4. Within the **Price rules** panel, click **Edit**.
5. Find the rule you want to delete.
6. Click the **Menu** icon for the rule you want to delete.
7. Click **Delete price rule**.
8. Confirm that you want to delete the rule, click **Delete**.

Duplicating a rule in a pricing strategy

Use this procedure to duplicate a rule that you have already added to a pricing strategy.

Procedure

1. Select **Pricing strategies**.
2. Find the strategy that you want to edit. Open the strategy.
3. Select **Defenition**.
4. Within the **Price rules** panel, click **Edit**.
5. Find the rule you want to duplicate.
6. Click the **Menu** icon for the rule you want to duplicate.
7. Click **Duplicate price rule**.
8. Make any changes to the **Price rule name** or **Defenition**.
9. Click **Save** when finished.

Chapter 7. Working with pricing recommendations

In IBM Dynamic Pricing, you can review, approve, override, review flags, and reject pricing recommendations that are made by pricing strategies.

Approving a single pricing recommendation

Use this procedure to manually approve a recommended pricing change.

Procedure

1. Select **Pricing strategies**.
2. Find the pricing strategy and expand it. The pricing strategy opens to the **Trends** data.
3. Click **Prices**. If the pricing strategy has run, then the recommended pricing changes based on the applied rules display. You need to perform the manual approvals for all of the items displayed.
4. To view details of a pricing recommendation, click **View more** (tile view) or click the **Product name** if you are in the table view. The **Overview** displays.
5. On the **Overview**, you can approve, reject, or override pricing.
6. Click **Price rules** to review how the price rules was applied to the pricing strategy. Each rule displays in the Rule column and you can see how the price rule impacted the recommended price.
7. Click **Competitors** to review competitor data. This data is the same as what is displayed in **Competitors** on the **Trend** page.
8. Click **Relationships** to review the product hierarchy attributes.
9. When you are ready to approved the pricing change,click **Overview**.
10. Click **Approve**.

Approving all pricing changes

Use this procedure to manually approve all of the pricing changes that for been marked for manual approval.

Procedure

1. Select **Pricing strategies**.
2. Find the pricing strategy and expand it. The strategy opens to the **Trends** data.
3. Click **Prices**. If the pricing strategy has run, then the recommended pricing changes based on the applied rules display.
4. Review the list of manual price approvals.
5. Select the box next to the **Product name** header.
6. Click **Approve** to approve all of the recommended pricing changes.

Downloading approved prices

Use this procedure to download the approved prices. The file generated is a CSV file. The generated file has a new column named **New price**.

Procedure

1. Select **Pricing strategies**.
2. Find the pricing strategy that you want to download the pricing you have approved.
3. For this strategy, click **Menu**.
4. Select **Download approved prices**. The default file name is export.csv and is file type CSV.
5. Click **Save File**. The file downloads to your device.

Overriding recommended pricing

Use this procedure to manually override a price recommendation that is made by a pricing strategy and then approve the override price you manually entered.

Procedure

1. Select **Pricing strategies**.
2. Find the pricing strategy and open it. The strategy opens to the **Trends** data.
3. Click **Prices**. The prices in the strategy that require approval or rejection display.
4. Select the list view.
5. Select the **Product name** to review. The **Price Change details** display. The **Overview** for the strategy displays.
6. In the **Overview**, you review the **Current** pricing as it compares with the **Recommended** pricing. You decide to override the **Recommended** price and you can enter a new price in the **Override** box.
7. Select **Price rules**. You can see the price rules as they were applied and see how they impacted the **Recommended** price.
8. Select **Competitors**. You can see the competitor pricing for the date range you specified in the pricing strategy.
9. Select **Relationships**. You can see what Line Family, Brand Family, and Size Family the product belongs to.
10. Click **Approve**.

Rejecting recommended pricing

Use this procedure to reject the recommended pricing for any items that have been marked for manual price approval in your pricing strategy.

Procedure

1. Select **Pricing strategies**.
2. Find the pricing strategy and expand it. The strategy opens to the **Trends** data.
3. Click **Prices**. If the pricing strategy has run, then the recommended pricing changes based on the applied rules display. You need to perform the manual rejection for all of the items displayed.
4. To view details of a pricing recommendation, click **View more** (tile view) or click the **Product name** if you are in the table view. The **Overview** displays.
5. On the **Overview**, you can approve, reject, or override pricing.
6. Click **Price rules** to review how the price rules was applied to the pricing strategy. Each rule displays in the Rule column and you can see how the price rule impacted the recommended price.

7. Click **Competitors** to review competitor data. This data is the same as what is displayed in **Competitors** on the **Trend** page.
8. Click **Relationships** to review the product hierarchy attributes.
9. When you are ready to reject the pricing change,click **Overview**.
10. Click **Reject** to reject the suggested pricing.

Reviewing broken rules

If you set the broken rule flag in the pricing strategy, you can use this procedure to review the broken rules.

Procedure

1. Select **Pricing strategies**.
2. Find the pricing strategy and expand it. The strategy opens to the **Trends** data.
3. Click **Prices**. The price list displays.
4. Review the list of manual price approvals. This list is based on the pricing rules that have been applied to the strategy.
5. Look for pricing recommendations that have a flag in the **Broken rules** column. The number next to the flag indicated how many rules were broken.
6. Click the flag. The rule name displays.
7. Review the information about the broken rule.

Viewing pricing change summary

Use this procedure to view pricing change summary for selected recommended pricing changes. A 7-day summary displays and lets you have a chance to review data before you approve prices.

Procedure



1. Select and open a pricing strategy.
2. Click **Prices**. If the pricing strategy has run, then the recommended pricing changes based on the applied rules display.
3. If you are not viewing the data in the tabular view, click table view icon. You must be in the tabular view to create the change summary data.
4. Select the products for which you want to get a pricing change summary. The pricing change summary data displays at the bottom of the page.

Chapter 8. Working with pricing strategy trends data

You can view trend data for the products in your pricing strategies.

After you run a pricing strategy, the trend data populates. Trend data displays as widgets. You can move these widgets around on this page, by dragging and dropping them.

Table 2. Trends data

Widget name	Explanation of data
Summary	Summary data is unit volume, revenue, and margin for the products in the pricing strategy for the Trameframe displayed in Timeframe selection.
Timeframe selection	You can narrow the time frame by using the selector in the time frame selector widget. After you narrow the timeframe, all of the other widget's data adjusts to the timeframe.
Sales history unit volume	In this line chart, each dot represents the unit volume by date for the products in the pricing strategy.
Sales history revenue \$, margin \$, and margin %	In this line chart, the color coded lines represent revenue by date, margin \$ by date, margin % by date for the products in the pricing strategy.
Unit volume break down	This widget is donut charts. The color coded donut charts provide yearly view for unit volume. The four charts display: year, quarter, month, and day. You can change the display year by select one of the year icons..
Competitors	<p>In this line chart, the color coded lines represent your pricing data and competitor data by date and price. Each dot represents a new price point for the Competitor by date. You can change the view of</p> <p style="text-align: right;"></p> <p>Competitor data by clicking  and selecting or deselecting competitor or your organization.</p>


Adding or removing competitor trend data

Use this procedure to add or remove competitors data in pricing trends.

Procedure

1. Select **Pricing strategies**.
2. Find the pricing strategy and expand it. The pricing strategy opens to the **Trends** data.



3. In the **Competitor** widget, click the wrench icon . The list of competitors displays.
4. Add or remove competitors by using the check boxes. Check mark shows data, unchecked means do not display data.
5. Close the competitor popup after making your changes.

Viewing trend data for pricing strategies

Use this procedure to view trend data for the products in a pricing strategy.

Procedure

1. Select **Pricing strategies**.
2. Find the pricing strategy and expand it. The strategy opens to the **Trends** data.
3. Review the trend data.


Changing the timeframe in trend data

Use this procedure to change the timeframe for the trend data in a pricing strategy.

Procedure

1. Select **Pricing strategies**.
2. Find the pricing strategy and expand it. The strategy opens to the **Trends** data.



3. In the **Timeframe selection** widget, use the **Time selection handle**  to adjust the time line for just the dates you want to look at. There are two adjusters in the time frame. All of the remaining data on this page adjusts to the dates you selected in the time frame.

Viewing sales history details in trend data

Use this procedure to view detailed information about the sales history trend data for a pricing strategy. Two sales history widgets are provided, one for revenue and margin, the other for unit volume by date.

Procedure

1. Select **Pricing strategies**.
2. Find the pricing strategy and expand it. The pricing strategy opens to the **Trends** data. Two sales history widgets are provided, one for revenue and margin, the other for unit volume by date.
3. In the **Sales history** revenue and margin widget, you can select a data point along the Revenue or Margin to see specific information about that point in time.

Changing the unit volume break down in trend data

Use this procedure to change the unit volume breakdown trend data in a pricing strategy.

Procedure

1. Select **Pricing strategies**.
2. Find the pricing strategy and expand it. The pricing strategy opens to the **Trends** data.
3. In the **Unit volume break down** widget, you can adjust the data displayed. You can:
 - Select a year to review
 - Select the quarter to focus on
 - You can select the months to focus on
 - You can select the days of the week to focus on

Any changes you make to the date range, is reflected in the Sales history, and Timeframe selection widgets.

Chapter 9. Administering user accounts

As a system administrator for IBM Dynamic Pricing, you are responsible to understand how to create user accounts.

Creating user accounts

Use this procedure to create a user account for a user that has been established in OCM. You must have system administration permissions to do this task.

Procedure

1. Select **Home**.
2. Select **Dynamic Pricing**.
3. Select **Administration**.
4. Select **Users**.
5. Click **Create user**.
6. Enter the **Login** for the user.
7. Enter display name in **Full name**.
8. If this user account is for a system administrator, select **User has admin rights**.
9. Select the divisions in which this user account can create, edit, and delete objects.
10. Click **Create**.

Chapter 10. Configuring user interface elements

As a system administrator for IBM Dynamic Pricing, you can perform some configuration tasks around how your user interface looks for your company.

There are two different locations where you might do your user interface configuration:

- **Administration > Configuration** - User friendly way to add or remove user interface elements. Not all screen elements can be updated here.
- **Administration > Advanced configuration** - This is a JSON version of the configuration. You need to be familiar with the JSON data format before you make any changes using **Advanced configuration**.

Updating user interface elements using advanced configuration

As a system administrator for IBM Dynamic Pricing, you can update what is displayed in the user interface for your company.

Advanced configuration is a JSON view of the menu and screen hierarchy in IBM Dynamic Pricing. All of the user interface elements that can be updated in the **Configuration** area are also configurable in **Advanced configuration**.

There are two update methods from **Administration > Advanced configuration**:

- Click **Administration >Advanced configuration**, and make your corrections directly into the JSON displayed. Then click **Submit**.
- Click **Administration >Advanced configuration**. Then click **Export** to export the JSON data. Update the JSON file locally and then **Import** it back into IBM Dynamic Pricing. Then click **Submit**.

After you submit your changes, they are automatically applied to the user interface.

Updating user interface elements using configuration

As a system administrator for IBM Dynamic Pricing, you can update what is displayed in the user interface for your company.

Here is a list of user interface elements you can update from **Administration > Configuration**:

Table 3. User Interface Elements

Element	Description
Price rules - Rule types	<p>You can update the list of rules that are available when creating a new pricing strategy:</p> <ul style="list-style-type: none"> • Check indicates that the rule is available in the Create price rule list when you are creating a new pricing strategy. • Uncheck indicates that the rule is not available in the Create price rule list when you create a new pricing strategy. • If you uncheck a rule which is currently used in a pricing strategy, the rule is still displayed in the pricing strategy and the rule is processed.
Product group - Product attributes	<p>You can update the product attributes that can be used to create a product group within a pricing strategy.</p> <ul style="list-style-type: none"> • Check indicates that the product attribute is available when you are creating a product group in a new pricing strategy. • Uncheck indicates that the product attribute is not available when you are creating a product group in a new pricing strategy. • If you uncheck a product attribute which is currently used in a pricing strategy product group, that attribute is still used in the filter. <p>For example, product attributes could be Product key, UPC, Product name, Product status, Unit of measure, Multipack, Line group, Manufacturer - just to name a few.</p>
Product group - Family attributes	<p>You can update the family attributes that can be used to create a product group within a pricing strategy. Family attributes are product attributes that are specific to the Brand family.</p> <ul style="list-style-type: none"> • Check indicates that the family attribute is available when you are creating a product group in a new pricing strategy. • Uncheck indicates that the family attribute is not available when you are creating a product group in a new pricing strategy. • If you uncheck a family attribute which is currently used in a pricing strategy product group, that attribute is still used in the filter. <p>For example, family attributes could be Product key, Line family, Brand class, Brand family, Size class and Size family.</p>

Table 3. User Interface Elements (continued)

Element	Description
Relationships - Product attributes	<p>You can update relationship product attributes that are displayed as part of the pricing recommendations for your pricing strategies.</p> <ul style="list-style-type: none"> • Check indicates that the relationship product attribute is displayed in the pricing recommendations relationships. • Uncheck indicates that the relationship product attribute is not displayed in the pricing recommendations relationships. • If you uncheck a relationship product attribute, but it was previously displayed in the pricing recommendations relationships, it continues to display. <p>Hint: To view relationship product attribute data, open an existing pricing strategy. Then click Prices. Select a pricing recommendation to review, by clicking View more. Click Relationships.</p> <p>For example, relationship product attributes include, Product key, UPC, Product name, Product status, Unit of measure, Brand - just to name a few.</p>
Relationships - Family attributes	<p>You can update relationship family attributes that are displayed as part of the pricing recommendations for your pricing strategies.</p> <ul style="list-style-type: none"> • Check indicates that the relationship family attribute is displayed in the pricing recommendations relationships. • Uncheck indicates that the relationship family attribute is not is displayed in the pricing recommendations relationships. • If you uncheck a relationship family attribute, but it was previously displayed in the pricing recommendations relationships, it continues to display. <p>For example, relationship family attributes include Product key, Line family, Brand class, Brand family, Size class, and Size family.</p>
Relationships - Price attributes	<p>You can update the relationship price attribute that are displayed as part of the pricing recommendations for your pricing strategies.</p> <ul style="list-style-type: none"> • Check indicates the price attribute is displayed in the pricing recommendations relationships. • Uncheck indicates the price attribute column is not displayed in the pricing recommendations relationships. <p>For example, a relationship price attribute would be current retail price.</p>

Table 3. User Interface Elements (continued)

Element	Description
Product catalog - Catalog attributes	<p>If you want to display the Product catalog menu item, slide the Enable product catalog button to a check mark and save. Then, you will see the Product catalog menu item in the side navigation panel.</p> <p>If you have enabled the Product catalog, you can easily control what columns are displayed for your company.</p> <ul style="list-style-type: none"> • Check indicates the catalog attribute column can be selected to display in the product catalog table. • Uncheck indicates the catalog attribute column can not be selected to display in the product catalog table.

To access this functionality, go to **Administration > Configuration**. As soon as you save any changes, the user interface is updated at that time.

Chapter 11. Data definitions

The data definitions for the IBM Dynamic Pricing data are found here.

You can view and download data from Dynamic Pricing if you have the correct permissions associated with your user account.

Competitor prices data

Competitor prices data is the current competitor prices for the products you are selling.

Competitor price history data

Competitor price history data is the historical data for competitor prices for the products you are selling.

Costs data

Costs data is the dollar amount your company spent to purchase the product.

Cost history data

Cost history data is historical data for product based on the cost history attributes.

Families data

Families data is a way to group like products.

For example, you might create a Family called Electronics. The products included in the family might be cell phones, tablets, and desktops.

Inventory data

Inventory data is the current amount of product you have available to sell.

Inventory history data

Inventory history data is inventory information about the history for the product.

Locations data

Locations data is list of places where consumer purchases products.

Model coefficient data

Model coefficient data is results from an algorithm showing consumer response to price changes. This is used during the price optimization to understand how to manipulate prices within the framework of the strategy and rules.

Prices data

Prices data is the current dollar amount your company is going to sell the product for.

Price history data

Price history data is the historical data for pricing for the products you are selling.

Price zones data

Price zones data is the data as it pertains to a group of stores that always have the same prices across products.

Products data

Products data is any data attributes that you have associated with products.

Sales history data

Sales history data is the historical data associated with product sales.

Statuses data

Statuses data is the various stages a strategy goes through during the optimization process.

Taxes data

Taxes data is the current tax associated with a product.

Taxes history data

Taxes history data is the history of the tax associated with a product.

Chapter 12. IBM Dynamic Pricing customer support

Personalized assistance is available directly from your Digital Development Representative for any issues you may encounter.

IBM Dynamic Pricing customer support is available over the phone or through email.

Customer Support is available through your Digital Development Representative. Call +1-877-426-3774 and use "Commerce" for the priority code. This is a toll free number for US-based customers. If you are calling from overseas, please be aware that your phone company may assess charges for the call.

You can also contact your Digital Development Representative by emailing DPTrisalSupport@us.ibm.com.

When contacting support you should have the following information available:

- Your name
- Your company
- Your phone number
- Detailed description of your issue
- Priority level of issue

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