

PRISM Portal

Consumer Pricing Rules

The Consumer Price Rules feature provides the ability to reprice PRISM Invoice line items when syncing via PRISM Connect removing the need for Partners to manually modify the cost post sync in their Professional Service Automation (PSA) system.

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Consumer Pricing Rules Tile

A Consumer Pricing Rule tile will display for users with the Global.CustomerAdmin role when viewing their Customer Details.

The screenshot displays the 'CUSTOMER DETAILS' page in the rhipe CRM. The interface includes a top navigation bar with the rhipe logo, a search bar, and notification icons. A sidebar on the left contains various menu items such as Dashboard, Programs, Customer Management, Invoices, Price Lists, Reports, Contact Management, Contact Us, Admin, User Management, and Integrations. The main content area shows the customer's name, status, website URL, and main phone number. Below this, there is a section for 'CREDIT CARD DETAILS' featuring a Visa credit card image. The 'CUSTOMER ADMINISTRATION' section contains five tiles: 'TO UPDATE THIS CUSTOMER RECORD PLEASE CONTACT RHIPE SUPPORT', 'MANAGE USERS >', 'MANAGE CLIENT CREDENTIALS >', 'SET BILLING DETAILS >', 'PRICING RULES >', and 'CONSUMER PRICING RULES >'. The 'CONSUMER PRICING RULES >' tile is highlighted with an orange border.

rhipe CRM

Search...

Currently viewing as **Contoso Managed Services Pty Ltd** Clear

< Customers / Contoso Managed Services Pty Ltd

CUSTOMER DETAILS

Name:
Contoso Managed Services Pty Ltd

Status:
Active

Customer Website URL:
www.rhipe.com

Main Phone:
1300 193 882

CREDIT CARD DETAILS

VISA
4012 88XX XXXX X881
D
11/2022

CUSTOMER ADMINISTRATION

TO UPDATE THIS CUSTOMER RECORD PLEASE CONTACT RHIPE SUPPORT

MANAGE USERS >

MANAGE CLIENT CREDENTIALS >

SET BILLING DETAILS >

PRICING RULES >

CONSUMER PRICING RULES >

Current Consumer Pricing Rules List and New Rule

The Consumer Price Rules screen shows a list of existing Price Rules and the option to create a New Rule.

The list of Price Rules shows all rules by default. To display only Price Rules that are active toggle Show Only Active Price Rule on and the list will update.

The screenshot shows the rhipe PRISM interface. At the top, there is a search bar and navigation icons. Below the search bar, a yellow banner indicates the user is viewing as 'Contoso Managed Services Pty Ltd Clear'. The main content area is titled 'PRICE RULES' and shows a breadcrumb trail: '< Customers / Contoso Managed Services Pty Ltd / Consumer Price Rules'. A 'New Rule' button is highlighted with a red box. Below the button, there is a toggle for 'Show Only Active Price Rules' which is currently turned off. The main content area displays 'No price rules found for this customer'. On the left side, there is a vertical navigation menu with icons for Dashboard, Programs, Customer Management, Invoices, Price Lists, Reports, Contact Management, Contact Us, Admin, User Management, and Integrations.

New Price Rule

To create a new Price Rule the following sections must be assigned:

- Choose Program Plan
- Discount
- Start Date and End Date

To refine the Price Rule further the following optional sections may be assigned:

- All Products (Product Selection)
- All End Customers (Customer Selection)

The screenshot displays the rhipe PRISM web application interface. At the top, the logo 'rhipe PRISM' is visible on the left, and a search bar with the text 'Search...' is on the right. Below the search bar, there are icons for a notification bell, a user profile, and a help icon. A yellow banner at the top of the main content area reads 'Currently viewing as Contoso Managed Services Pty Ltd Clear'. The breadcrumb navigation shows the path: '< Customers / Contoso Managed Services Pty Ltd / Consumer Price Rules / New Rule'. The main heading is 'NEW PRICE RULE'. Below this, a text block states: 'Within the **Choose Program Plan** program plan, **All Products** will be priced at **Discount** for **All End Customers** between **Start Date and End Date** .'. To the right of this text is a teal 'Add Rule' button. Below the button, there is an 'Example Pricing:' section with the text: 'Please configure a valid price rule to receive example pricing.'. On the left side of the interface is a vertical sidebar menu with icons and labels for: Dashboard, Programs, Customer Management, Invoices, Price Lists, Reports, Contact Management, Contact Us, Admin, User Management, and Integrations.

Choose Program Plan

After selecting the Choose Program Plan option on the New Price Rule screen a modal dialog will display allowing for selection of a Program.

Once a program is selected the Program Plans dropdown will populate with the applicable plans to choose from.

Choosing a Program and Program Plan is required before you can Set Program Plan.

The screenshot displays the rhipe PRISM user interface. On the left is a dark sidebar with navigation icons for Dashboard, Programs, Customer Management, Invoices, Price Lists, Reports, Contact Management, Contact Us, Admin, User Management, and Integrations. The main content area shows the breadcrumb path: < Customers / Contoso Managed Services Pty Ltd / Consumer Price Rules / New Rule. Below this is the heading 'NEW PRICE RULE' and a preview of the rule: 'Within the **Choose Program Plan** program plan, **All Products** will be priced at **Discount Customers** between **Start Date and End Date** .'. A modal dialog titled 'PROGRAM PLAN SELECTION' is open on the right. It features a teal header with a close button (X). The dialog contains two dropdown menus: 'Program *' and 'Program Plan *'. A teal button labeled 'Set Program Plan' is positioned at the bottom right of the dialog. The entire modal dialog is enclosed in an orange border.

Product Selection

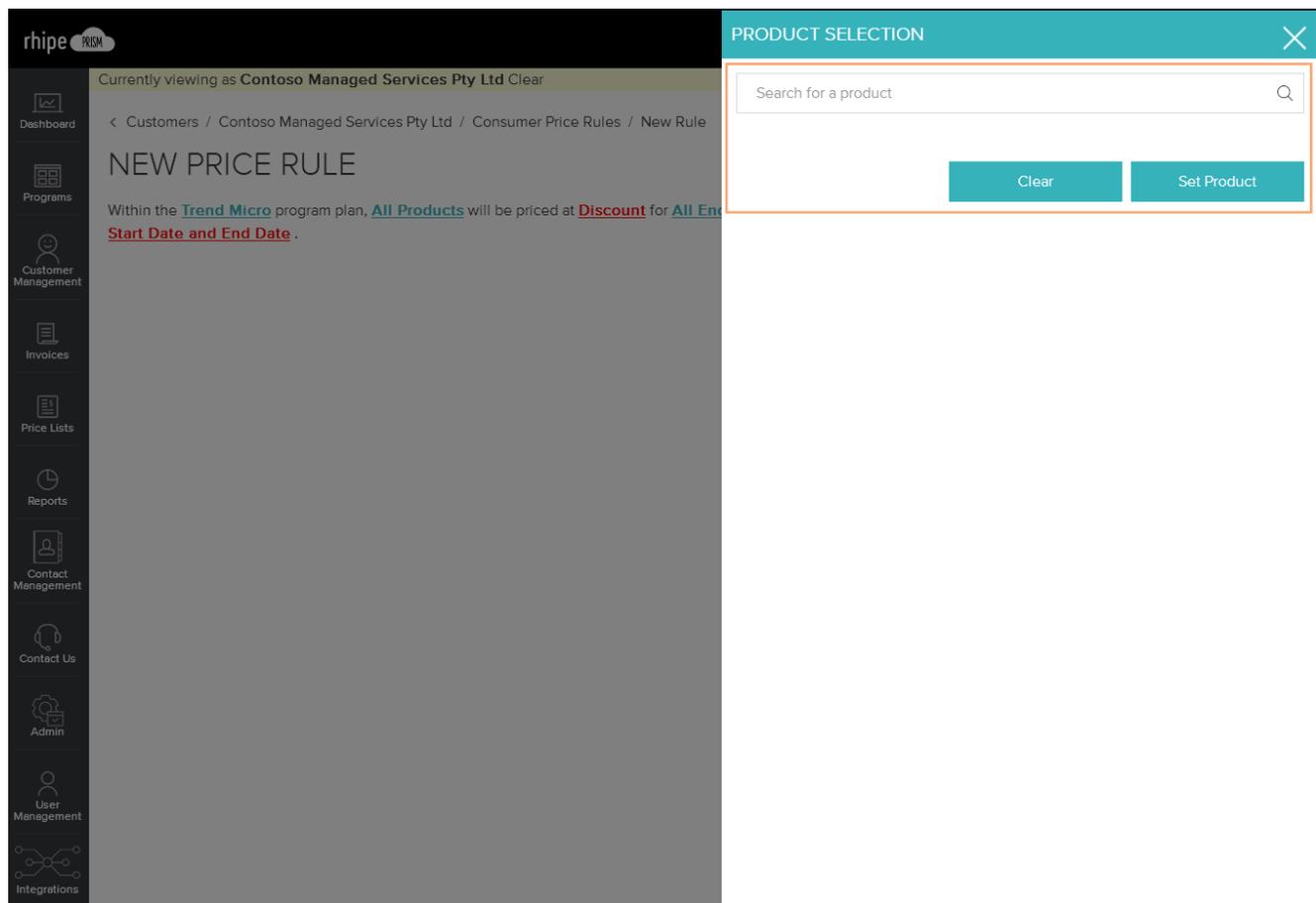
If the Price Rule should apply to a specific Product selecting the All Products option on the New Price Rule screen will display a dialog.

Entering the name in the search field will show a list of filtered Products.

Once the desired Product is selected from the list selecting Set Product will confirm and dismiss the dialog.

If a Product was chosen in error repeating the above process will update the selection.

Should a Product not be needed for the Price Rule selecting Clear will reset the option to All Products.



Discount Selection

After selecting the Discount option on the New Price Rule screen a modal dialog will display allowing for selection of a rule and associated value to apply.

In the example below Discount Percentage off Retail Price was selected, a percentage text field was shown and the value of 10.00% was entered.

Selecting Set Discount Level will confirm and dismiss the dialog.

The screenshot displays the rhipe PRISM interface. The background shows the 'NEW PRICE RULE' screen with a sidebar menu containing options like Dashboard, Programs, Customer Management, Invoices, Price Lists, Reports, Contact Management, Contact Us, Admin, User Management, and Integrations. The main content area shows the 'NEW PRICE RULE' screen with a breadcrumb trail: < Customers / Contoso Managed Services Pty Ltd / Consumer Price Rules / New Rule. The main content area displays the text: 'Within the **Trend Micro** program plan, **All Products** will be priced at **10.00% off Retail Price** for **Customers** between **Start Date and End Date**.' The 'DISCOUNT SELECTION' modal dialog is overlaid on the right, containing the following options:

- At Retail Price
- Discount Percentage off Retail Price
- Margin percentage on top of Cost Price
- Markup percentage on top of Cost Price
- At Cost Price (i.e. Rebate Only where applicable)

A 'Set Discount Level' button is located at the bottom right of the modal dialog.

Customer Selection

If the Price Rule should apply to a specific Customer selecting the All End Customers option on the New Price Rule screen will display a dialog.

Entering the name in the search field will show a list of filtered Customers.

Once the desired Customer is selected from the list selecting Set Customer will confirm and dismiss the dialog.

If a Customer was chosen in error repeating the above process will update the selection.

Should a Customer not be needed for the Price Rule, clearing Search for a customer and selecting Set Customer will reset the option to All End Customers.

The screenshot displays the rhipe PRISM web application interface. On the left is a dark sidebar with navigation icons for Dashboard, Programs, Customer Management, Invoices, Price Lists, Reports, Contact Management, Contact Us, Admin, User Management, and Integrations. The main content area shows the 'NEW PRICE RULE' screen with a breadcrumb trail: < Customers / Contoso Managed Services Pty Ltd / Consumer Price Rules / New Rule. The page content includes: 'Currently viewing as Contoso Managed Services Pty Ltd Clear', 'NEW PRICE RULE', and a preview of a price rule: 'Within the Trend Micro program plan, All Products will be priced at 10.00% off Retail P Customers between Start Date and End Date .'. A teal 'CUSTOMER SELECTION' dialog box is overlaid on the right side of the screen. It features a search input field with the placeholder text 'Search for a customer' and a magnifying glass icon. Below the search field is a teal button labeled 'Set Customer'. The dialog box has a close 'X' icon in the top right corner.

Start Date and End Date

After selecting the Start Date and End Date option on the New Price Rule screen a modal dialog will display allowing for selection of a required Start Date and optional End Date.

Selecting the date fields will display a date picker where selecting a day will confirm and dismiss the picker.

If the Price Rule is for a fixed period of time select an End Date.

Once the required Start Date is entered Set Date will enable allowing to confirm the selections and dismiss the dialog.

The screenshot displays the rhipe PRISM user interface. On the left is a dark sidebar with navigation icons for Dashboard, Programs, Customer Management, Invoices, Price Lists, Reports, Contact Management, Contact Us, Admin, User Management, and Integrations. The main content area shows the user is logged in as 'Contoso Managed Services Pty Ltd' and is on the 'NEW PRICE RULE' screen. The breadcrumb trail is '< Customers / Contoso Managed Services Pty Ltd / Consumer Price Rules / New Rule'. The main heading is 'NEW PRICE RULE'. Below it, a preview of the rule text is shown: 'Within the Trend Micro program plan, All Products will be priced at 10.00% off Retail Price for Customers between Start Date and End Date.' A modal dialog titled 'DATE SELECTION' is overlaid on the right. It has a teal header with a close button (X). The dialog contains two input fields: 'Start Date *' (required) and 'End Date' (optional). A teal 'Set Dates' button is located at the bottom right of the dialog.

Example Pricing

Once all required sections are completed the option to check the pricing of the new rule.

To view and example the following options are required:

- Billing Entity
- Sell Currency
- Search for a Product

Selecting Add Rule will save the new Price Rule and return to the Consumer Price Rules screen.

The screenshot displays the Rhipe PRISM web application interface. At the top, there is a search bar and navigation icons. The user is logged in as 'Contoso Managed Services Pty Ltd'. The breadcrumb trail indicates the current location: 'Customers / Contoso Managed Services Pty Ltd / Consumer Price Rules / New Rule'. The main heading is 'NEW PRICE RULE'. Below this, a preview text states: 'Within the [Trend Micro](#) program plan, [All Products](#) will be priced at [10.00% off Retail Price](#) for [All End Customers](#) between [1 June 2021](#) and [no End Date](#) .'. On the right side, there is a 'Add Rule' button and an 'Example Pricing' section. This section includes dropdown menus for 'Billing Entity' (set to 'Rhipe Australia Pty Ltd') and 'Sell Currency' (set to 'AUD'). Below these is a search box for 'Search for an end customer' with a search icon. At the bottom of the pricing section, the following values are listed: 'Cost Price: \$4.20', 'Retail Price: \$5.00', 'Customer Price: \$4.50', and 'Margin: 7.14%'. The left sidebar contains navigation options: Dashboard, Programs, Customer Management, Invoices, Price Lists, Reports, Contact Management, Contact Us, Admin, User Management, and Integrations.

rhipe PRISM

Search...    

Currently viewing as **Contoso Managed Services Pty Ltd** [Clear](#)

[Dashboard](#) < [Customers](#) / [Contoso Managed Services Pty Ltd](#) / [Consumer Price Rules](#)

PRICE RULES

[New Rule](#)

RULES Show Only Active Price Rules

Trend Micro	Active	10% off Retail Price for Contoso Managed Services Pty Ltd and for all of their child customers	▼
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- Dashboard
- Programs
- Customer Management
- Invoices
- Price Lists
- Reports
- Contact Management
- Contact Us
- Admin
- User Management
- Integrations

Cancelling a Price Rule

Should a Price Rule no longer be applicable it can be cancelled by setting an End Date.

Selecting the chevron on the right side of the Price Rule to be updated will expand and display the details and option to Cancel Rule.

The screenshot displays the 'rhipe PRISM' interface. At the top, there is a search bar and navigation icons. Below the header, a yellow banner indicates the user is viewing as 'Contoso Managed Services Pty Ltd'. The main content area is titled 'PRICE RULES' and includes a 'New Rule' button and a toggle for 'Show Only Active Price Rules'. A table lists one price rule:

Rule Name	Status	Description	Action
Trend Micro	Active	10% off Retail Price for Contoso Managed Services Pty Ltd and for all of their child customers	⌵

Expanded Price Rule list item with details and Cancel Rule option.

The screenshot displays the rhipe CRM interface. At the top, the user is logged in as 'Contoso Managed Services Pty Ltd'. The breadcrumb trail is '< Customers / Contoso Managed Services Pty Ltd / Consumer Price Rules'. The main heading is 'PRICE RULES', with a 'New Rule' button to the right. A toggle switch for 'Show Only Active Price Rules' is also present. The main content area shows a table with one rule expanded:

Rule Name	Status	Description	Actions
Trend Micro	Active	10% off Retail Price for Contoso Managed Services Pty Ltd and for all of their child customers	Expand icon

The expanded rule details are shown in a box with the following information:

- Rule Start Date: 01 June 2021
- Rule End Date: No End Date
- Cancel Rule button

The left sidebar contains navigation icons for: Dashboard, Programs, Customer Management, Invoices, Price Lists, Reports, Contact Management, Contact Us, Admin, User Management, and Integrations.

Selecting End Date will display a date picker allowing for selection of a date occurring on or after the current date. Selecting a day will confirm and dismiss the picker.

Selecting Set End Date will confirm the date selection and dismiss the dialog. The Price Rule will update and have the new End Date.

The screenshot shows the rhipe PRISM interface. The top navigation bar includes the rhipe logo and the text 'Currently viewing as Contoso Managed Services Pty Ltd Clear'. The main content area is titled 'PRICE RULES' and shows a table of rules. A dialog box titled 'CANCEL RULE' is overlaid on the right side of the screen. The dialog box contains an input field labeled 'End Date' and a button labeled 'Set End Date'.

Customer	Status	Description
Trend Micro	Active	10% off Retail Pr customers

Rule Start Date: 01 June 2021
Rule End Date: No End Date

What Pricing Rule Will Apply?

To determine what Pricing Rule will apply at the time of pricing the most specific and highest weighted rule is used.

Rule Scope	Rank Value
Product	Low
End Customer	Medium
Product and End Customer	High

For example, when pricing Product X for End Customer Y:

- Price Rule A has Product X selected. It's Rank Value would be, Low
- Price Rule B has End Customer Y selected. It's Rank Value would be, Medium
- Price Rule C has Product X and End Customer Y selected. It's Rank Value would be, High

Given Price Rule C is the most specific rule it would rank highest and be selected over the other rules.