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.

Table of Contents

Consumer Pricing Rules Tile

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

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.

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)

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.

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.
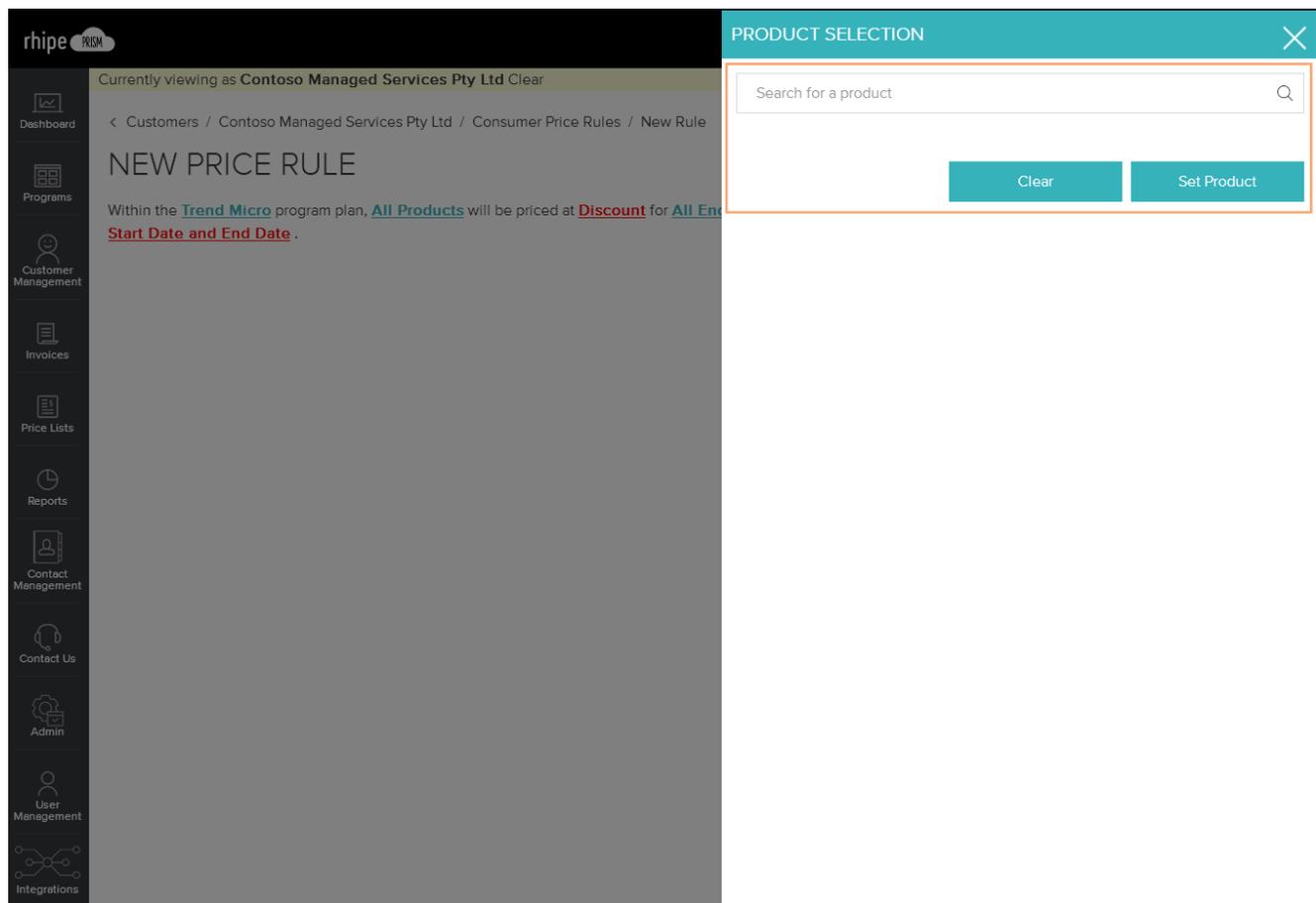
Discount Selection

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.

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.

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.

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.

rhipe

rhipe PRISM

Search...

Dashboard

Programs

Customer Management

Invoices

Price Lists

Reports

Contact Management

Contact Us

Admin

User Management

Integrations

‹ 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 | ⌄ |

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.

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

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.

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.