



SET UP AND MAINTAIN PRICING STRATEGIES AND ASSIGN STRATEGIES

MFG

QUICK REFERENCE GUIDE

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.

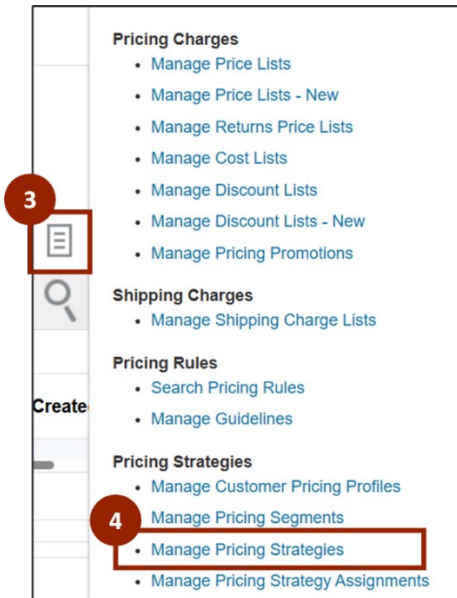
Manage Pricing Strategies

1. From the **Home** screen, click the **Order Management** tab.
2. Click on **Pricing Administration**.



3. Click the **Task** icon.

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



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

6. Select the **Search** button.

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

Name	Description	Objective	Business Unit	Default Currency	Status	Start Date	End Date
NCCE Pricing Strategy	Pricing Strategy for State of North Carolina Correction...		5200 DEPARTMENT USD	Approved	6/2/25 1:50 AM		

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.

8

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

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

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

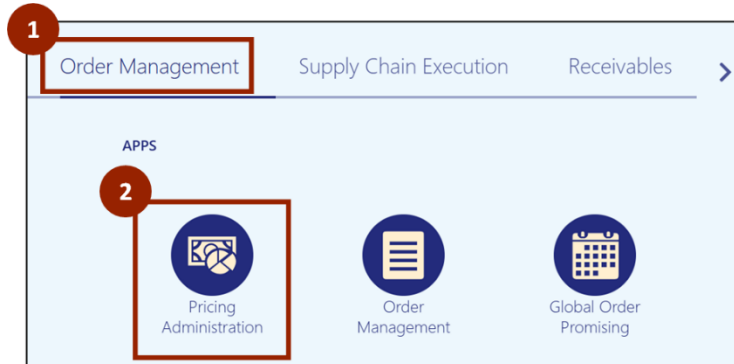
Note: Unlocked fields within the **Edit Pricing Strategy: NCCE Pricing Strategy** screen may be updated, as needed.

9

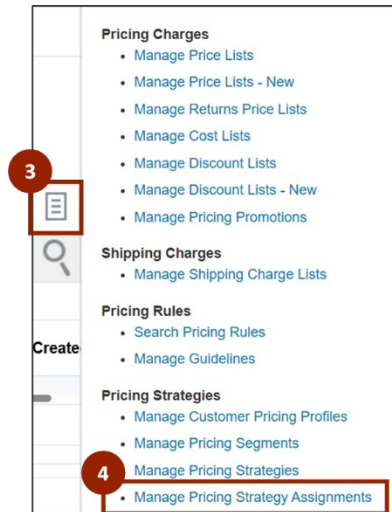
9. If any changes are made to the unlocked fields, click the **Save** button within the **Edit Price List** screen to apply your updates.

Manage Pricing Strategy Assignments

1. From the **Home** screen, click the **Order Management** tab.
2. Click on **Pricing Administration**.



3. Click the **Task** icon.
4. Within the *Pricing Strategies* section, click **Manage Pricing Strategy Assignments**.



5. Review the **Assignment Matrix**.
6. Under the *Pricing Strategy Assignment Rules* section in the *Pricing Segment* field, verify the **NCCE Pricing Segment** is selected.
7. In the *Pricing Strategy* field, verify the **NCCE Pricing Strategy** is selected.

The screenshot shows the 'Manage Pricing Strategy Assignments' form. At the top, there are buttons for 'Save and Close', 'Save', and 'Cancel'. Below the buttons, there is a table with columns: Assignment Level, Pricing Context, Transaction Type, Start Date, and End Date. The first row is highlighted with a red box and a red circle with the number 5. Below the table, there is a section titled 'Header-Sales-All-06/03/2025 05:57: Pricing Strategy Assignment Rules'. This section contains two dropdown menus: 'Pricing Segment' (highlighted with a red box and a red circle with the number 6) and 'Pricing Strategy' (highlighted with a red box and a red circle with the number 7). Both dropdown menus are set to 'NCCE Pricing Segment' and 'NCCE Pricing Strategy' respectively.

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.

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.

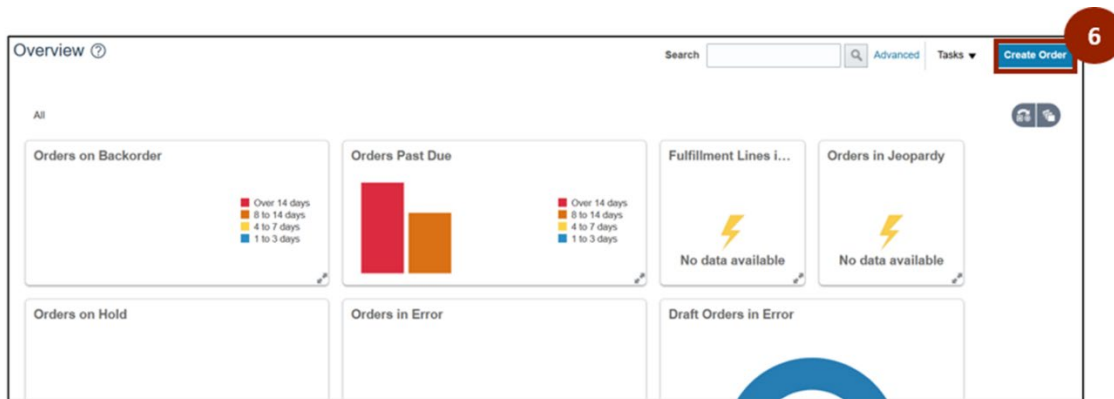
Pricing Strategy and Segment in Sales Order

1. Click the **Company Single Sign-On (SSO)** button.
2. Enter your **dac.nc.gov** email address.
3. Click **Next** then enter your **password**.
4. On the **Home** page, select the **Order Management** tab.

5. Click **Order Management App**.



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



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

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



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

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.

View Pricing Strategy and Segment [X]

Pricing Segment NCCE Pricing Segment

Segment Explanation The applicable pricing segment for this transaction is Pricing Segment=NCCE Pricing Segment Precedence=100 because Revenue Potential=null Customer Size=null Cost To Serve=null Customer Value=null Customer Rating=null

Strategy Name NCCE Pricing Strategy

Strategy Explanation The applicable pricing strategy for this transaction is Pricing Strategy=NCCE Pricing Strategy because Pricing Segment=NCCE Pricing Segment

Done

9

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