

# Multiple Price Lists in the pCon World

## Using article data with price dates

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# Multiple Price Lists in the pCon World (2016-06-22)

## Using article data with price dates

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## 1 The Idea

Products regularly receive new pricing while their options for configuration stay unchanged. In two successive versions of article data, pricing information is often the only differing factor.

To deal with this, it is possible to provide a data version with multiple price lists. This saves you as a user both time and hassle: You create an offer using prices from a particular date and a single manufacturer catalog.

Switching between catalogs with differing pricing information is omitted and you avoid inserting duplicate articles in your pCon applications – as a result, the effort required for offers and article lists also decreases.

### 1.1 The Price Date

You have received new configurable article data from a manufacturer. This packet may include both old pricing information and a current price list, or future pricing may already be integrated. Each of these supplied price lists come with a valid date. These price dates define the access day for a respective price.

You will use the price date to select a price list.

For example: A price list for the current year has a validity date of 1.1.2016. Enter this date in order to work with the list for 2016. In addition, this data includes pricing for the following year. By entering 1.1.2017, you can now work with the data for 2017.

**NOTE: The specific date for the change of a price list may vary from manufacturer to manufacturer.**

The pricing information is stored in the data for each individual article. You can set the pricing data for either the complete project or, if necessary, for the individual configuration.

## 1.2 Working with multiple price lists

The concept of multiple price lists covers two typical use cases for product data with various pricing: Working with pricing for the next year and creating offers based on old pricing information.

In November, your manufacturer delivered a new data packet with prices for the current year (2016). The pricing structure for the following year (2017) is also included.

Using the price date, you decide which price the article receives. For example, you create:

- an offer for Customer A with prices from 2016.
- an offer for Customer B. This offer is to be made at the beginning of next year. Within the application, you enter the price date for the next year (e.g. 1.1.2017) and are given future pricing.

Your manufacturer provides current article data. In addition to the prices for the current year (2016), the price list for 2015 is also included. You write:

- an offer with the price date for the current financial year. The article list and offer contain prices for 2016.
- another offer. The customer has a framework contract with long-term fixed pricing. In this case, you would set the price date for 2015.

## 2 The most important aspects of multiple price lists

For the use of multiple price lists in your pCon application or plugin, please read Sections 3 (pCon.planner 5 and pCon.configurator), 4 (pCon.planner 7), 5 (pCon.basket) and 6 (pCon.xcad).

If your manufacturer does not offer price lists, everything will remain the same for you. Should you have any questions regarding your application, please also read sections 3 – 5.

### 2.1 Price dates

- The selection of prices in your pCon application takes place using the price date.
- Your manufacturer provides information regarding corresponding dates and prices, along with the data.
- The manufacturer allocates the respective price lists with a valid start date. Set a price list within a period of validity, and this also determines the valid list. For example: A price list is valid from 1.1.2015 until 31.12.2015. If you enter 15.3.2015 as the price date, you will receive pricing from this list.
- If you do not set a date, the pCon application will use the date of the creation of the project. This price date will be used as project price date until another date is manually set.
- When you insert an article, the date used on the project level will be used for pricing. If you did not yet set a price date, the application uses the date of the creation of the project.
- If you change the date, previously inserted articles will maintain the previous price date.
- If an article should have a new price date, select the article and assign the date.

## 2.2 Working with old projects

- If you work with older projects that possibly contain articles without price dates, these articles will receive a price date when updated. The price is then updated accordingly.

## 2.3 What happens when data changes?

If you continue working with an old project, it may be necessary to update the article data. Beyond a price list change, a new data inventory could possibly include other far-reaching changes. As a result, the use of previous pricing is often possible.

It is possible, however, for individual articles within the data inventory to have no set price. In this case, the application sets the price to zero. It will be noted on the article that price determination was not successful.

This program behavior is shown, for example:

- if you are working with an old price list, in which a new article was not yet entered,
- or, if you would like to work with an old article that is no longer valid in the new list.

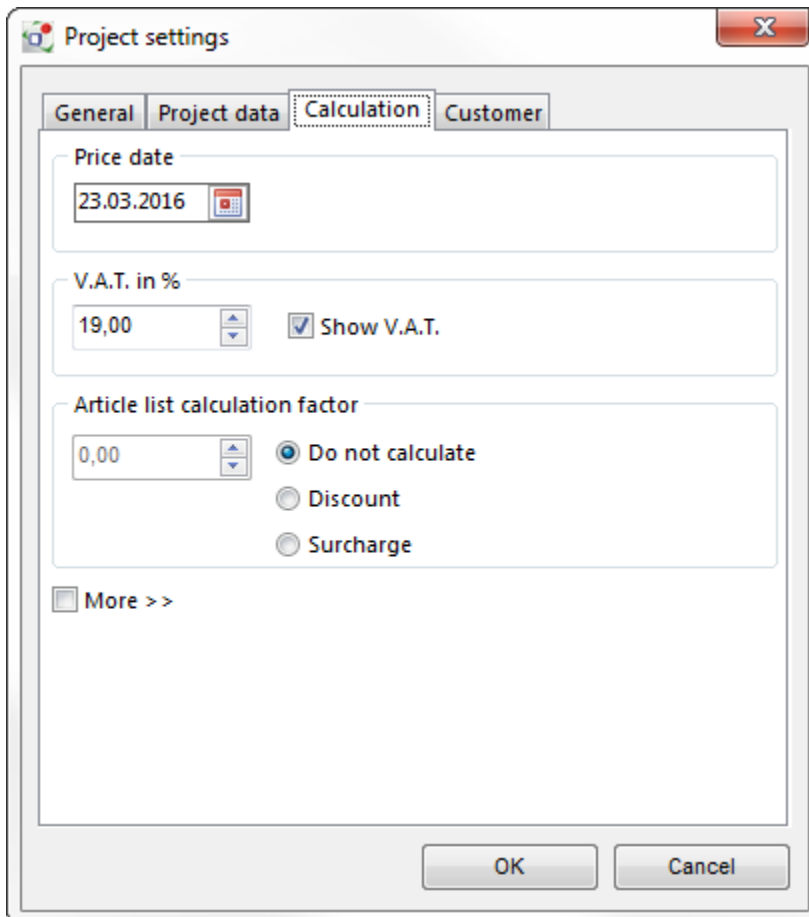
If you would still like to use the article, please change the article to the appropriate price list.

**NOTE:** In rare cases, pricing information and article data can no longer be correctly linked following an update. Please contact the respective manufacturer.

### 3 How do I use multiple price lists with pCon.planner/pCon.configurator 5?

#### 3.1 Working with new plans or inserting articles

In pCon.planner (starting from version 5.8.5), you set the price date for individual articles on planning level.



A date for the overall plan can be entered using the *File* Menu in *Project Settings* under the *Calculation* tab.

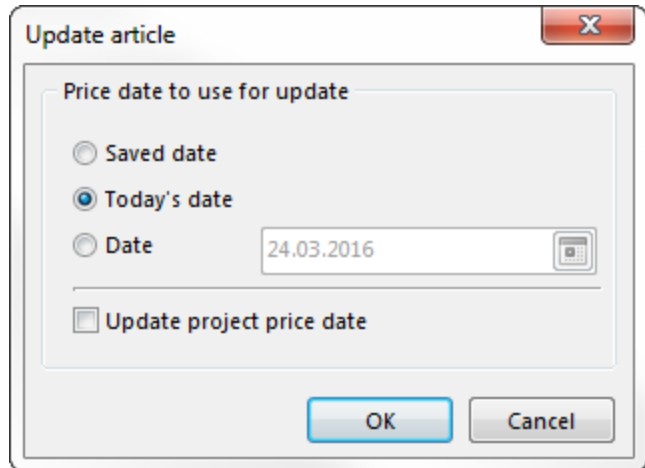
These price dates apply to all articles that are subsequently inserted into the project.

To assign an individual price for an article that is already in the plan, you must first select the article. Then, click *Update article* within the *Properties* dialog. The *Article Update* dialog box should then appear.

Within this dialog you can decide for the selected article whether:

- to use the price date already saved within the project (*Saved Date*)
- to assign the article the current date as the price date (*Today's Date*)
- to enter a new date (*Date*).

In addition, here you can choose whether or not to *Update project price date*. More information on this can be found in Section 3.2.



**NOTE:** You can see the price date for an article by selecting the article. The date and respective price will be shown in the *Information* window. If the date of the article differs from the price date on the planning level, it will be shown in bold print in the *Information* window.

### 3.2 Working with previously-created projects

Here you should first perform an update of the overall plan. Click on *Update* under the *File* menu. This will display the *Update Article* dialog box, in which you can select a date (see Section 3.1).

**NOTE:** If you would like to update an individual article, first select the item. Then, click on the *Update article* button in the *Properties* menu.

During the update, pCon.planner 5 checks whether the articles exist with their configurations. If this is the case, the planning software takes the information from the installed files according to the date-matching price for the article.

**NOTE:** If you do not want to work with multiple price lists, always select *Today's Date* during the update. The article will then keep its current price. This corresponds to the update process of earlier versions of pCon.planner 5.

In this case, please update your project every time you open it. In addition, you have to check *Update project price date* in order to change the project price date to the current date. This done, articles will be inserted using today's date:

In the *Update Article* dialog, you will also find the option *Update project price date*. This option is available for *Today's Date* as well as for a manually-entered *Date*.

- If this option is enabled (checkbox selected), the price date will be adjusted for all selected articles during the update process, and the date for all articles will be adopted by all subsequent articles that you insert into the project.
- If this option is disabled (checkbox unselected), the entered date will be updated for all selected articles. Articles that are later inserted will maintain the saved date that is set on a planning level.

**DO THIS WHEN YOU OPEN A PLAN THAT DOES NOT YET HAVE A PRICE DATE.**

The *Price Date* field for the individual article will then not be shown. On a planning level, pCon.planner will set *Today's Date* as the default value. When updating with the option *Saved Date*, the selected items will maintain the current date.

To give the article an alternative price date, update using *Date* and enter your desired date. These will be determined for the articles and their respective prices from the installed data.

### 3.3 Showing price dates in the article list's print preview

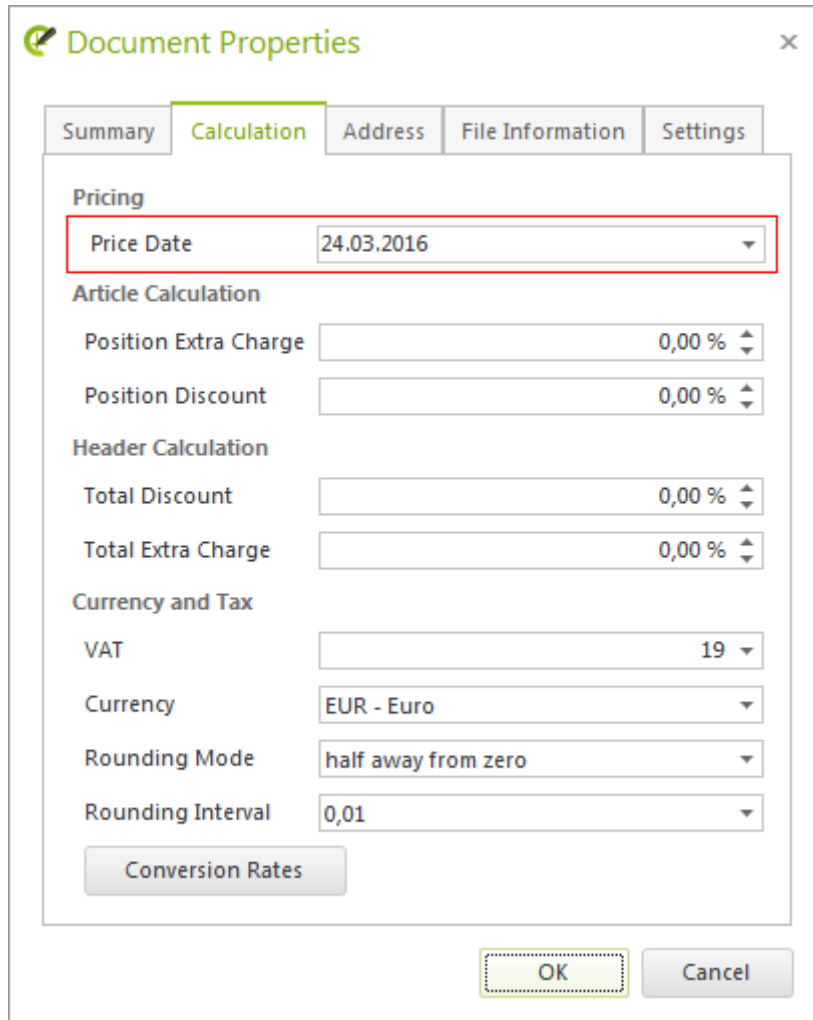
If needed, the price date information can be shown in the article list. Click on *Preferences* within the *Extras* menu. In the *Article List (Options)* area, you can enable *Show price date*. For each article, the respective date will be shown in the price list.



## 4 How are the pricing functions implemented in pCon.planner 7?

### 4.1 Working with new plans or inserting articles

In pCon.planner (starting from version 7.3), you set the price date for individual articles or planning levels.



The screenshot shows the 'Document Properties' dialog box with the 'Calculation' tab selected. The 'Price Date' field is highlighted with a red border and contains the date '24.03.2016'. Below it are sections for 'Article Calculation' (Position Extra Charge, Position Discount), 'Header Calculation' (Total Discount, Total Extra Charge), and 'Currency and Tax' (VAT, Currency, Rounding Mode, Rounding Interval). A 'Conversion Rates' button is at the bottom left, and 'OK' and 'Cancel' buttons are at the bottom right.

A date for the overall plan can be entered using the *File* Menu in *Document Settings* under the *Calculation* tab.

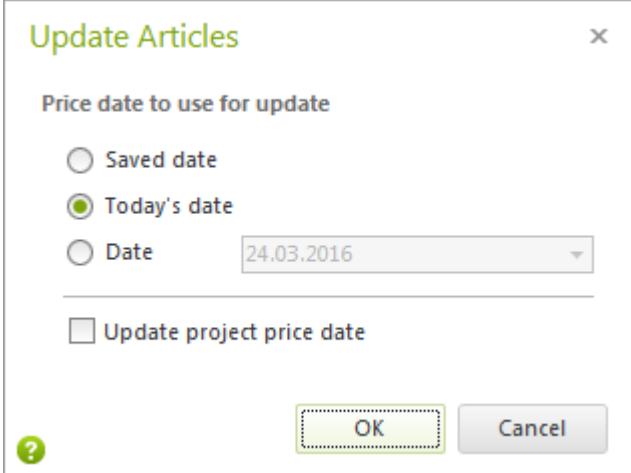
These price dates apply to all articles that are subsequently inserted into the project.

To assign an individual price for an article that is already in the plan, you must first select the article.

Then use the *Article Toolbox*. In the *Configuration* area, click on *Update Articles*, and a dialog will appear. Here you can set the price date for an article. Within this dialog you can decide for the selected article whether:

- to use the price date already saved within the project (*Saved Date*)
- to assign the article the current date as the price date (*Today's Date*)
- to enter a new date (*Date*).

In addition, here you can choose whether or not to *Update project price date*. More information on this can be found in Section 4.2.



**NOTE:** You can see the price date for an article by selecting the article. Once you've done so, click on *Article Info* in the *Article Toolbox*. This will open a window in which all general article information as well as the date and respective pricing are shown.

If the date of the article differs from the price date on the planning level, it will be shown in bold print in the *Article Information Window*.

## 4.2 Working with a previously-created project

In this case, you should first perform an update. Select the article that you would like to update. Then, click on *Update Article* on the *Article Toolbar*. This will display the *Update Article* dialog box, in which you can select a date (see Section 4.1).

During the update, pCon.planner 7.3 checks whether the articles exist with their configurations. If this is the case, the planning software takes the information from the installed files according to the date-matching price for the article.

**NOTE:** If you do not want to work with multiple price lists, always select *Today's Date* during the update. The article will then keep its current price. This corresponds to the update process of earlier versions of pCon.planner 7.

In this case, please update your project every time you open it. In addition, you have to check *Update project price date* in order to change the project price date to the current date. This done, articles will be inserted using today's date:

In the *Update Article* dialog, you will also find the option *Update project price date*. This option is available for *Today's Date* as well as for a manually-entered *Date*.

- If this option is enabled (checkbox selected), the price date will be adjusted for all selected articles during the update process, and the date for all articles will be adopted by all subsequent articles that you insert into the project.
- If this option is disabled (checkbox unselected), the entered date will be updated for all selected articles. Articles that are later inserted will maintain the saved date that is set on a planning level.

**DO THIS WHEN YOU OPEN A PLAN THAT DOES NOT YET HAVE A PRICE DATE.**

The *Price Date* field in *Article Information (Article Toolbox)* will then not be shown. On a planning level, pCon.planner 7.3 will set *Today's Date* as the default value. When updating with the option *Saved Date*, the selected items will maintain the current date.

To give the article an alternative price date, update using *Date* and enter your desired date. These will be determined for the articles and their respective prices from the installed data.

### 4.3 Showing price dates in the article list's print preview

If needed, the price date information can be shown in the article list. In the *Article List* using the *Print settings* button under *Print (Settings)*, *Form settings* tab, check the box for *Price date*.

For each article, the respective date will be shown in the price list.

## 5 How do I use multiple price lists in pCon.basket?

In pCon.basket (starting from version 1.11), you determine the price dates depending on the application purposes for various locations.

### 5.1 Price date for the Header Calculation

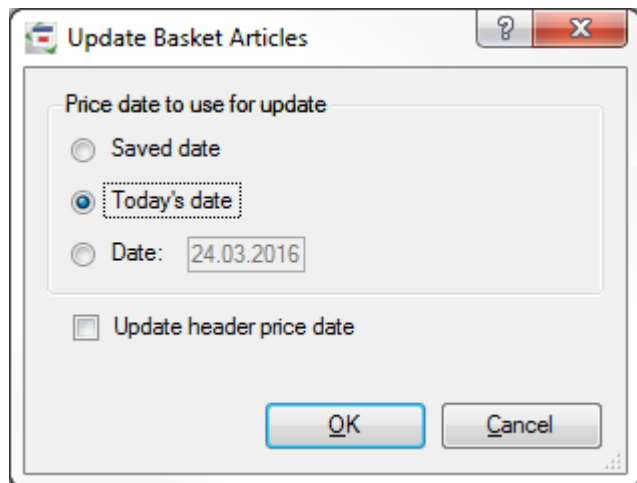
You can set the price date for a project in the *Header Calculation*. The date indicated here applies to all articles inserted subsequently into the project.

### 5.2 Price dates for individual articles

Select the article and update them under *Extras, Update Basket Articles*. A dialog will then be displayed. Within this dialog you can decide for the selected article whether

- to use the price date already saved within the project (*Saved Date*)
- to assign the article the current date as the price date (*Today's Date*)
- to enter a new date (*Date*).

In addition, here you can choose whether or not to adjust the price date of a project (*Update project price date*). More information on this can be found in Section 5.3.



You can view the price date for an article under the *Article Calculation* tab of the article view.

**NOTE:** If you are working with an already existing project, first perform an update. The application will check whether the articles exist with their configurations. If this is the case, pCon.basket will take the information from the installed files according to the date-matching price for the article.

**NOTE:** If you do not want to work with multiple price lists, always select *Today's Date* during the update. The article will then keep its current price. This corresponds to the update process of earlier version of pCon.basket.

In this case, please update your project every time you open it. In addition, you have to check *Update project price date* in order to change the project price date to the current date. This done, articles will be inserted using today's date:

### 5.3 Changes to dates in the header calculation when updating

In the *Update Basket Articles* dialog, you will find the option *Update header price date*. This option is available for *Today's Date* as well as a manually-entered *Date*.

- If this option is enabled (checkbox selected), the price date will be adjusted for all selected articles during the update process, and the date for all articles will be adopted by all subsequent articles that you insert into the project (see Section 5.1).
- If this option is disabled (checkbox unselected), the entered date will be updated for all selected articles. Articles that are later inserted will maintain the saved date that is set on a planning level.

### 5.4 Opening a plan that does not yet have a price date

The article *Price Date* will initially be shown as *not set*. In the header calculation, pCon.basket will set *Today's Date* as the default value. When updating with the option *Saved Date*, the selected items will maintain the current date.

To give the article an alternative price date, update using *Date* and enter your desired date. These will be determined for the articles and their respective prices from the installed data.

**NOTE:** If a price date for an article is invalid, the article will be marked red in the article tree. In the article view, an *invalid* notation will appear. Under the *Configuration* tab and in the *Article List*, an additional indication of *Invalid Price Date* will be shown.

This problem is solved once you update the article and select a different price date, in which a price is available. This could be the current date, for example.

## 6 How do I use multiple price lists with pCon.xcad?

Working with the pCon.xcad Plugin (starting from version 2.20), you determine the price dates depending on the application purposes for various locations.

### 6.1 Price date for the Project Settings

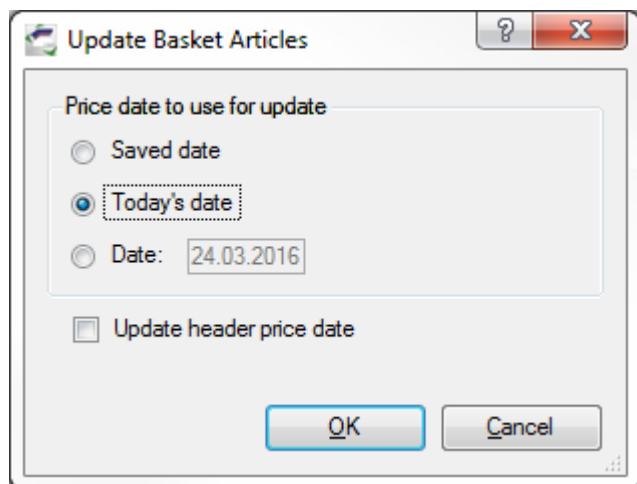
You can set the price date for a project under *Edit* in the *Project Settings, Calculation* tab. The date indicated here applies to all articles inserted subsequently into the project.

### 6.2 Price dates for individual articles

Select the article and update them under *Extras, Update Basket Articles*. A dialog will then be displayed. Within this dialog you can decide for the selected article whether

- to use the price date already saved within the project (*Saved Date*)
- to assign the article the current date as the price date (*Today's Date*)
- to enter a new date (*Date*).

In addition, here you can choose whether or not to adjust the price date of a project (*Update project price date*). More information on this can be found in Section 5.3.



You can view the price date for an article in the *Properties* area under the *Configuration* tab of the article view.

**NOTE:** If you are working with an already existing project, first perform an update. The application will check whether the articles exist with their configurations. If this is the case, pCon.xcad will take the information from the installed files according to the date-matching price for the article.

**NOTE:** If you do not want to work with multiple price lists, always select *Today's Date* during the update. The article will then keep its current price. This corresponds to the update process of earlier version of pCon.xcad.

In this case, please update your project every time you open it. In addition, you have to check *Update project price date* in order to change the project price date to the current date. This done, articles will be inserted using today's date:

### 6.3 Changes to dates in the header calculation when updating

In the *Update Basket Articles* dialog, you will find the option *Update header price date*. This option is available for *Today's Date* as well as a manually-entered *Date*.

- If this option is enabled (checkbox selected), the price date will be adjusted for all selected articles during the update process, and the date for all articles will be adopted by all subsequent articles that you insert into the project (see Section 6.1).
- If this option is disabled (checkbox unselected), the entered date will be updated for all selected articles. Articles that are later inserted will maintain the saved date that is set on a planning level.

### 6.4 Opening a plan that does not yet have a price date

The article *Price Date* will initially be shown as *not specified*. In the *Settings*, pCon.xcad will set *Today's Date* as the default value. When updating with the option *Saved Date*, the selected items will maintain the current date.

To give the article an alternative price date, update using *Date* and enter your desired date. These will be determined for the articles and their respective prices from the installed data.

**NOTE:** If a price date for an article is invalid, the article will be marked red in the article tree. In the article view, an *invalid* notation will appear. Under the *Configuration* tab and in the *Article List*, an additional indication of *Invalid Price Date* will be shown.

This problem is solved once you update the article and select a different price date, in which a price is available. This could be the current date, for example.

**NOTE:** In pCon.xcad BE, the price date can only be set via pCon.configurator.

## Legal remarks

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