

# Create new price list

This action requires the **"create price list"** permissions.

To create a new price list, navigate to the "create" form from the table by clicking the "+" or by going [here](#).

Price lists

Q Search...

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X

<input type="checkbox"/>	STATUS	CURRENCY CODE	IS END USER	MASTER PRICE LIST	SOURCE	CREATED AT	UPDATED AT	ACTIONS
<input type="checkbox"/>	RELEASED	EUR	YES	NO	Internal	Mar 11, 2022	Jun 13, 2024	<div><div></div><div></div></div>
<input type="checkbox"/>	RELEASED	EUR	NO	NO	Internal	Oct 18, 2024	Oct 18, 2024	<div><div></div><div></div></div>
<input type="checkbox"/>	RELEASED	EUR	YES	NO	External	Apr 11, 2024	Aug 7, 2024	<div><div></div><div></div></div>
<input type="checkbox"/>	OBSOLETE	EUR	NO	NO	Internal		Nov 18, 2021	<div><div></div><div></div></div>
<input type="checkbox"/>	RELEASED	EUR	NO	NO	Internal	Sep 27, 2024	Sep 27, 2024	<div><div></div><div></div></div>
<input type="checkbox"/>	RELEASED	EUR	NO	NO	Internal	Sep 27, 2024	Sep 27, 2024	<div><div></div><div></div></div>
<input type="checkbox"/>	RELEASED	EUR	YES	NO	Internal	Jan 21, 2022	Jan 21, 2022	<div><div></div><div></div></div>
<input type="checkbox"/>	RELEASED	EUR	YES	NO	Internal		Oct 31, 2021	<div><div></div><div></div></div>
<input type="checkbox"/>	RELEASED	EUR	YES	NO	Internal	Jun 13, 2024	Jun 27, 2024	<div><div></div><div></div></div>
<input type="checkbox"/>	RELEASED	EUR	YES	NO	Internal	Jun 13, 2024	Jun 27, 2024	<div><div></div><div></div></div>
<input type="checkbox"/>	RELEASED	EUR	YES	NO	Internal		Jan 14, 2022	<div><div></div><div></div></div>
<input type="checkbox"/>	RELEASED	EUR	YES	NO	Internal	Sep 27, 2024	Dec 2, 2024	<div><div></div><div></div></div>
<input type="checkbox"/>	RELEASED	EUR	NO	NO	Internal	Nov 14, 2024	Nov 14, 2024	<div><div></div><div></div></div>

## Basic information

To create a new price list, at least some basic information has to be entered (name, currency, decimal precision, source and description).

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Basic informationManagersPrice list versions

Basic information

NAME

Enter name

\*

CURRENCY CODE

EUR

\*

PRICE ROUND PRECISION

1

\*

SOURCE

Source

\*

MASTER PRICE LIST

NO

IS END USER

NO

PARENT PRICE LIST

Parent price list

STATUS

Select status

i

DESCRIPTION

Enter description

\*

☐ After save, create another

Save

A price list's name must be entered. It is recommended that it is a unique one, to avoid any confusion.

The "**Master price list**" switch determines, if the price list is a main or a "**master**" price list from which other price lists will be derived. If the new price list **is not a "master" price list**, then its parent needs to be selected in the "**Parent price list**" drop-down.

MASTER PRICE LIST

☐ NO

PARENT PRICE LIST

Parent price list

▼

Every **price list is required to have a currency selected**. By default, **EUR** currency is selected. The "**Price round precisison**" defines to how many decimals all prices on the price list are rounded up to. By default, prices are rounded to 1 decimal.

CURRENCY CODE

EUR

▼

\*

x

PRICE ROUND PRECISION

1

\*

With the price formatting set, the price list **source** should be selected. The source, in this case, means where the price list has been received from, either "**internal**" - from within the company or "**external**" - from an external source ( eg. a consultant).

SOURCE

Source

▼

\*

IS END USER

☐ NO

STATUS

Select status

▼

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The "**Is end user**" switch is used to determine, if orders, created with this price list will be calculated into employee salary rewards.

The initial **status** of a price list is not among the necessary information. If not selected, a new price list will have the "**Released**" status set as default. The status can also be set as "**Obsolete**", in cases when old price lists are being entered into the system.

A **description of a price list is necessary** to provide additional information about what the price list's purpose is, as names are not always descriptive enough.

← Add new price list

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Basic information

NAME

tets price list

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MASTER PRICE LIST

☐ NO

PARENT PRICE LIST

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▼

x

CURRENCY CODE

EUR

▼

\*

x

PRICE ROUND PRECISION

1

\*

SOURCE

Internal

▼

\*

x

IS END USER

☐ NO

STATUS

RELEASED

▼

i

DESCRIPTION

This is an example price list.

\*

☐ After save, create another

Save

Once all the information has been entered, the price list can be saved.

## Managers

-

## Price list versions

After the new price list is created, you should open the "**price list versions**" tab and create the initial version of the new price list.

here, click "new version". this opens a model, where new version is defined.

← tets price list

Basic infoManagersPrice list versions

Version

New Version

NAME	DESCRIPTION	VALID FROM
------	-------------	------------

Save

File manager0

Comments0

- Name - price list version name (eg. END\_XXX\_2023)
- valid from - the start date of price list validity (is active from this date forwards)
- decription - a short description of price list version function....
- currency rate - currency exchange rate (exchange to parent price list currency, eg. REPEU => EUR)
- parent price list version - the last version of the price list (eg. REPEU 2023)

The screenshot shows a web application interface for managing price lists. At the top, there's a header with a back arrow, the text 'tets price list', and tabs for 'Basic info', 'Managers', and 'Price list versions'. Below the header, there's a 'Version' section with a 'New Version' button. A modal dialog titled 'Add new price list version' is open in the center. The dialog has a close button (X) in the top right corner. It contains several input fields: 'NAME' with the value 'END\_EXM\_2024', 'VALID FROM' with the value '04. 11. 2024', 'DESCRIPTION' with the value 'This is an example of price list version.', 'CURRENCY RATE' with the value '1,0000', and 'PARENT PRICE LIST VERSION' with a dropdown menu showing 'Select price list version'. There is a 'Create' button at the bottom right of the dialog. The background is slightly dimmed, showing a sidebar with 'File manager', 'Comments', and 'Activity timeline' sections.

← tets price list

Basic info Managers Price list versions

Version

New Version

NAME DESCRIPTION VALID FROM

File manager

Comments

Activity timeline

Add new price list version

NAME

END\_EXM\_2024

VALID FROM

04. 11. 2024

DESCRIPTION

This is an example of price list version.

CURRENCY RATE

1,0000

PARENT PRICE LIST VERSION

Select price list version

Create

Before viewing the newly created price list version you have to add yourself and anyone else who can edit these price list version as the price list version manager on the "managers" tab and in price list manager (/price-list-versions) page .

Once the managers have been assigned, open the pc version under "price list versions" tab.

Once open, the "Generate tags" button must be pressed to generate appropriate tags for this price list version.

← END\_CZ\_EUR

Basic infoManagersPrice list versions

Version

New Version

NAME	DESCRIPTION	VALID FROM	
END_CZ_EUR 2024	End User Price List, Czech Republic EUR	6/11/2024	Active

Save

File manager

Comments

Activity timeline

END\_CZ\_EUR 2024

×

✕ Deactivate

Import pricelist

Generate tags

Name:

Valid from:

Valid to:

Parent price list version:

END\_CZ\_EUR 2024

Jun 11, 2024

Empty

REPEU 2023

Description:

End User Price List, Czech Republic EUR

Children Price list versions

These tags are used in the system to display the price list version within the price list manager,

Revision #7

Created 4 November 2024 12:05:05 by Admin

Updated 17 December 2024 09:57:50 by Admin