

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](#).

<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	✍ 🗑
<input type="checkbox"/>	RELEASED	EUR	NO	NO	Internal	Oct 18, 2024	Oct 18, 2024	✍ 🗑
<input type="checkbox"/>	RELEASED	EUR	YES	NO	External	Apr 11, 2024	Aug 7, 2024	✍ 🗑
<input type="checkbox"/>	OBSOLETE	EUR	NO	NO	Internal		Nov 18, 2021	✍ 🗑
<input type="checkbox"/>	RELEASED	EUR	NO	NO	Internal	Sep 27, 2024	Sep 27, 2024	✍ 🗑
<input type="checkbox"/>	RELEASED	EUR	NO	NO	Internal	Sep 27, 2024	Sep 27, 2024	✍ 🗑
<input type="checkbox"/>	RELEASED	EUR	YES	NO	Internal	Jan 21, 2022	Jan 21, 2022	✍ 🗑
<input type="checkbox"/>	RELEASED	EUR	YES	NO	Internal		Oct 31, 2021	✍ 🗑
<input type="checkbox"/>	RELEASED	EUR	YES	NO	Internal	Jun 13, 2024	Jun 27, 2024	✍ 🗑
<input type="checkbox"/>	RELEASED	EUR	YES	NO	Internal	Jun 13, 2024	Jun 27, 2024	✍ 🗑
<input type="checkbox"/>	RELEASED	EUR	YES	NO	Internal		Jan 14, 2022	✍ 🗑
<input type="checkbox"/>	RELEASED	EUR	YES	NO	Internal	Sep 27, 2024	Dec 2, 2024	✍ 🗑
<input type="checkbox"/>	RELEASED	EUR	NO	NO	Internal	Nov 14, 2024	Nov 14, 2024	✍ 🗑

Basic information

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

Home / [Add new price list](#) Basic information Managers Price list versions

Basic information

NAME *

CURRENCY CODE * PRICE ROUND PRECISION * SOURCE *

MASTER PRICE LIST NO PARENT PRICE LIST

IS END USER NO STATUS ⓘ

DESCRIPTION *

After save, create another

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.

The image shows two input fields. The first is a toggle switch labeled 'MASTER PRICE LIST' with the value 'NO'. The second is a dropdown menu labeled 'PARENT PRICE LIST' with the selected value '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.

The image shows two input fields. The first is a dropdown menu labeled 'CURRENCY CODE' with the value 'EUR'. The second is a text input field labeled 'PRICE ROUND PRECISION' with the value '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).

The image shows three input fields. The first is a dropdown menu labeled 'SOURCE' with the value 'Source'. The second is a toggle switch labeled 'IS END USER' with the value 'NO'. The third is a dropdown menu labeled 'STATUS' with the value 'Select status'.

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.

The image shows a screenshot of a web application form titled 'Add new price list'. The form is divided into sections: 'Basic info', 'Managers', and 'Price list versions'. The 'Basic information' section contains several fields: 'NAME' (tets price list), 'CURRENCY CODE' (EUR), 'PRICE ROUND PRECISION' (1), 'SOURCE' (Internal), 'MASTER PRICE LIST' (NO), 'IS END USER' (NO), 'PARENT PRICE LIST' (repeu), 'STATUS' (RELEASED), and 'DESCRIPTION' (This is an example price list). There is a 'Save' button and a checkbox for 'After save, create another'.

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

Managers

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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 info Managers Price list versions 🔒 🗄️ 🔔

Version New Version

NAME	DESCRIPTION	VALID FROM
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Save

File manager 0

Comments 0

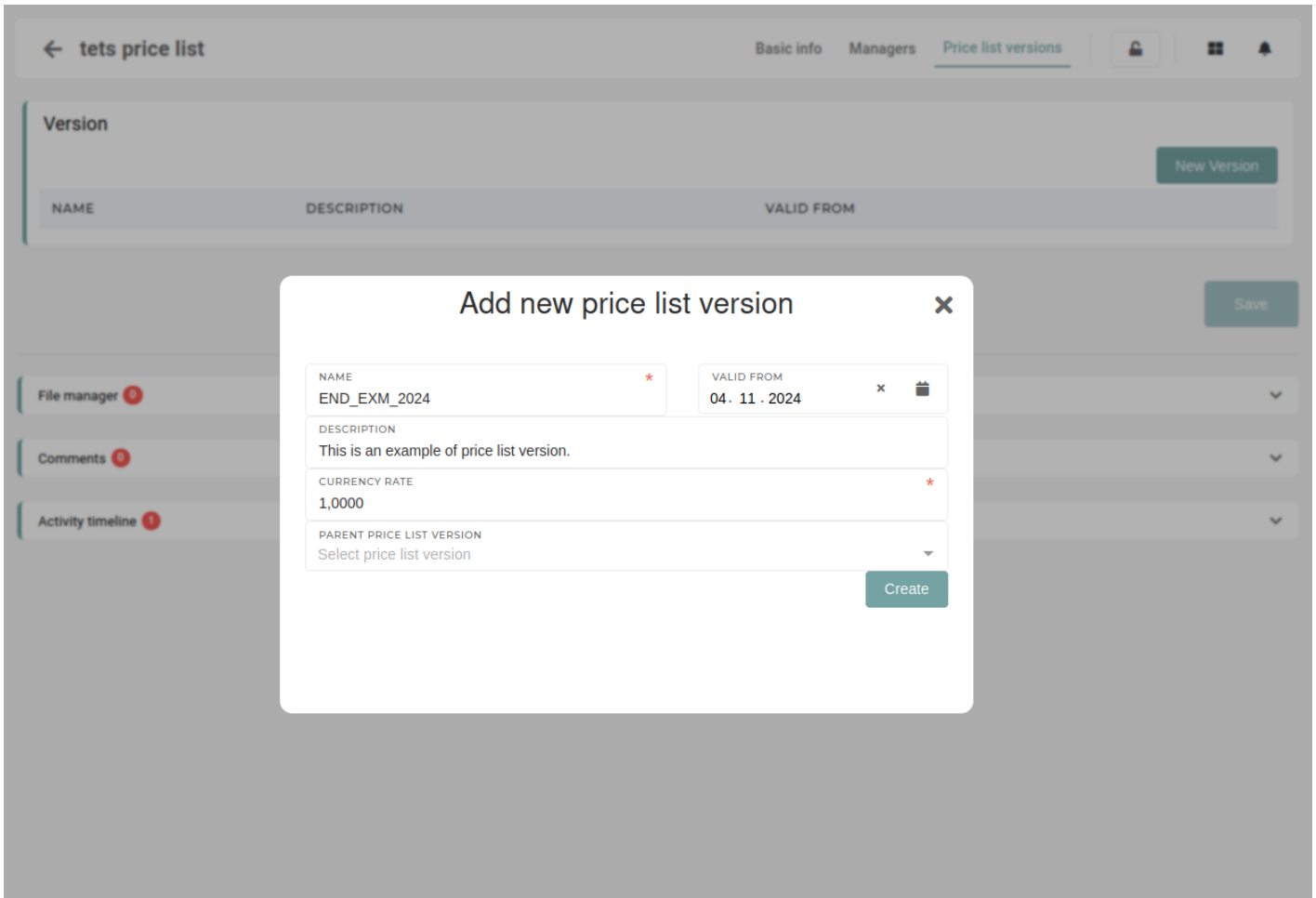
Name - price list version name (eg. END_XXX_2023)

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)



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 info Managers Price 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

END_CZ_EUR 2024

✕

Deactivate Import pricelist Generate tags

Name: END_CZ_EUR 2024 Valid from: Jun 11, 2024 Valid to: Empty Parent price list version: REPEU 2023

Description: End User Price List, Czech Republic EUR

Children Price list versions

File manager Comments Activity timeline

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

Revision #7
Created 2024-11-04 12:05:05 UTC by Admin
Updated 2024-12-17 09:57:50 UTC by Admin