

User Guide - Pricelist v5.0.0

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The pricelist module is used to create custom price rules according to various entities like the product, product category, Product Minimum Quantity, and Product Minimum Price. By this admin can create various price rules very easily for various entities and then use the created price rules by creating a price list.

The price list can create by simply adding price rules from the created price rule list. Admin can very easily set a price list targeting the customers/ customer groups. It is very beneficial for those who want to keep their different customers at different than attractive prices.

Note

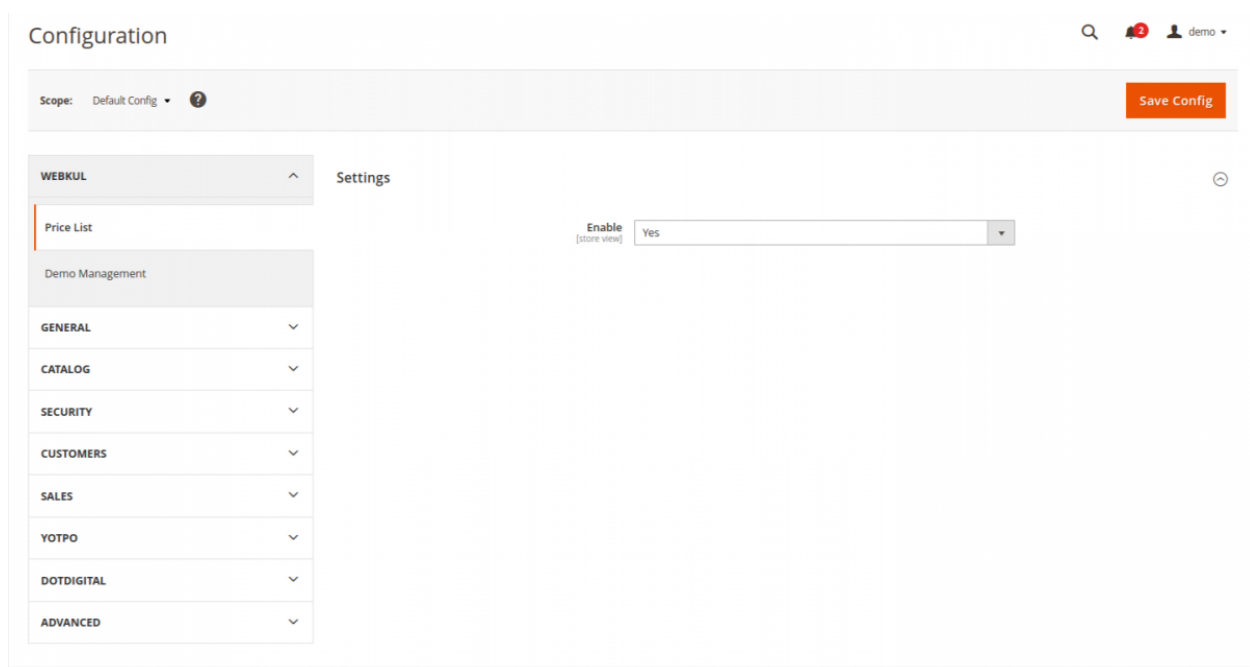
- Product quantity and total product price rules are not applicable for bundle products.
- The Price Rules will apply to the Base Price and not to the Special/Group/Tier Pricing.

Features

- By this Module, the admin can create rules for the pricelist.
- By this Module, the admin can assign multiple rules for the pricelist.
- The Admin can assign multiple pricelists to customer or customer group.
- Admin can set rules according to the product.
- The Admin can set rules according to category.
- Admin can set rules according to quantity.
- Admin can set the rule according to the total product price.
- The Admin can create a rule to increase the price.
- The Admin can create a rule to decrease price.
- Admin can set the priority of rules.
- The Admin can set the priority of pricelists.
- The Admin can set a start and end date for by the price.
- Pricelist will be applied automatically according to the priority.

Module Configuration

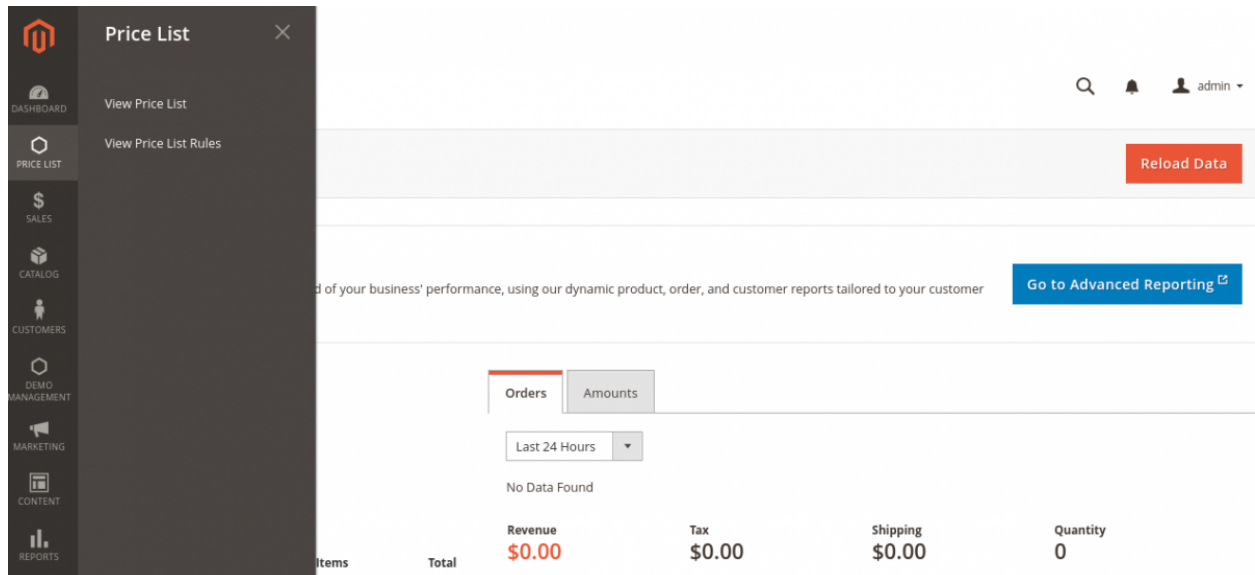
After the installation of the **Price list for the Magento 2** extension, the admin will find the configuration settings panel by navigating through **Stores->Configuration->Price List** as per the snapshot below.



Enable/Disable: Admin can enable or disable the price list for products under the module configuration page.

Manage Price Rule

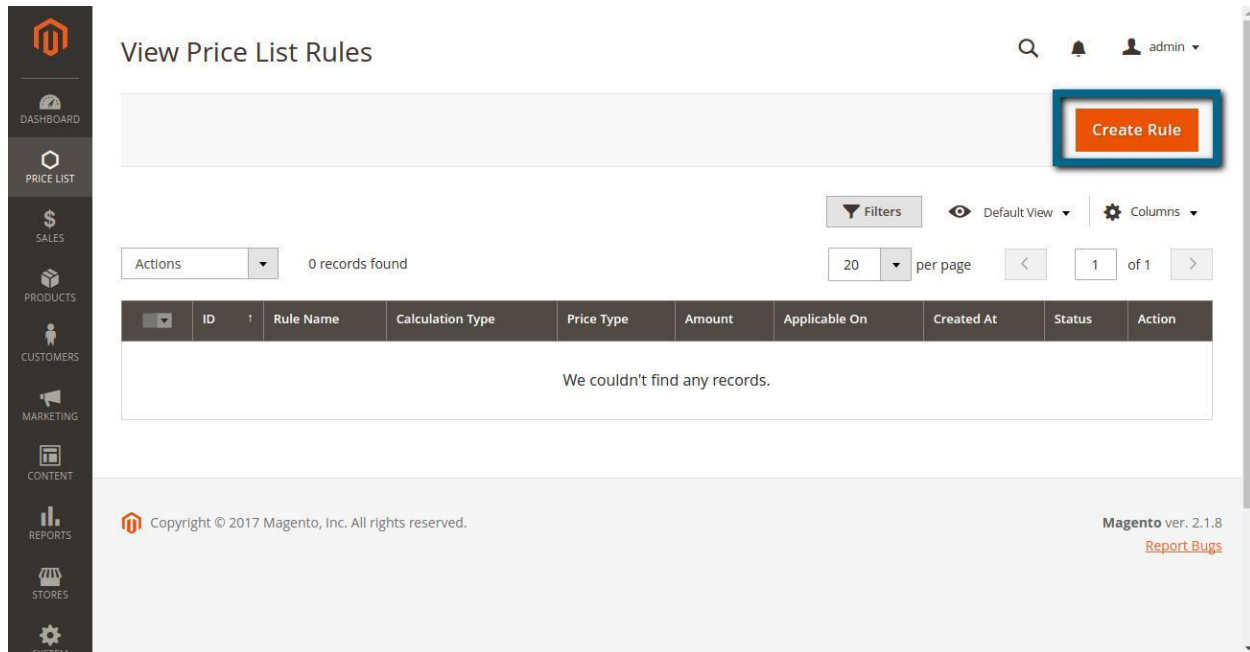
The admin can see the **Price List** tab in his backend admin panel.



The admin can **add/ view/ edit/ delete** price rules to manage Price List Rules by navigating through **Price List ->View Price List Rules**.

Add Price Rule

Admin can add price rules by navigating through **Price List -> View Price List Rules -> Create Rule**.



By clicking the **"Create Rule"** icon, the admin will be redirected to the New Rule page. In this case, the admin will make the settings for two sections, essentially if the price rule is for products or categories. The second section will contain the product or categories to be chosen for the price rule.

If the price rule is set for Product Quantity and Total Product Price, then only one section must be set for the admin. A certain common section for all will be the information on the price rule.

Price Rule Information

The **Price Rule Information** is for setting major basic information required for creating a price rule. It can be navigated through **Price List -> View Price List Rules -> Create Rule -> Price Rule Information**.

This section has the following fields to be set for creating a price rule, the fields to be set are:

- **The price Rule Name:** Here the admin will enter the name of the price rule.
- **Price Calculation Type:** The admin can choose "Increase Price" from the dropdown to add the calculated amount to the product's price or "Decrease Price" to subtract the calculated amount to the product's price.
- **Price Type:** The price calculation can be done by "Percent Price" or "Fixed Price".
- **Amount:** Here the admin will set the amount for the "Price Type".
- **Priority:** The admin will set the priority for the price rule
- **Applicable On:** The Price rule can be applied by Products / Categories / Product Quantity / Total Product Price.

Please Note: If the price rule is applying on Product Quantity/ Total Product Price, the admin will set the minimum quantity/amount respectively.

Applicable On *

Quantity

Applicable On *

Total

Status *

- **Status:** The price rule can be made "Active" or "Deactivate" by the admin.

The **Product** section is for selecting the product on which the price rule will be applied. It can navigate through **Price List -> View Price List Rules -> Create Rule -> Products**.

Products

It has the following fields to set or select for creating a price rule, the fields to be set are:

PRICE RULE INFORMATION

Price Rule Information

Products

Products

Search

Reset Filter

7 records found

20 per page

1 of 1

<input checked="" type="checkbox"/>	ID	Name	SKU	Price
<input type="checkbox"/>				From To
<input checked="" type="checkbox"/>	1	Joust Duffle Bag	24-MB01	\$34.00
<input checked="" type="checkbox"/>	2	Strive Shoulder Pack	24-MB04	\$32.00
<input checked="" type="checkbox"/>	3	Crown Summit Backpack	24-MB03	\$38.00
<input checked="" type="checkbox"/>	4	Wayfarer Messenger Bag	24-MB05	\$45.00
<input checked="" type="checkbox"/>	36	Aim Analog Watch	24-MG04	\$45.00
<input checked="" type="checkbox"/>	37	Endurance Watch	24-MG01	\$49.00
<input checked="" type="checkbox"/>	38	Summit Watch	24-MG03	\$54.00

- Products can select by the product's checkboxes.
- All products can select at once for the price rule by using a mass selection checkbox.
- Lastly, the admin can save the price rule via the "Save Price Rule" button.

The **Categories** section is for selecting the category in which the price rule will apply. It can navigate through **Price List -> View Price List Rules -> Create Rule -> Categories**.

Category

It has the following fields to set or select for creating a price rule, the fields to be set are:

category

PRICE RULE INFORMATION

Price Rule Information

Categories

Categories

-- Tees

-- Tanks

- Bottoms

-- Pants

-- Shorts

Women

- The admin will select one or multiple categories from the multi-select box.

- After that, the admin can save the price rule via the "Save Price Rule" button.

View and Edit Price Rule

The admin can view/edit/delete price rules by navigating through **Price List -> View Price List Rules -> View**.

View Price List Rules 🔍 🔔 👤 demo

[Create Rule](#)

Filters Default View Columns

Actions 4 records found 20 per page 1 of 1

ID	Rule Name	Calculation Type	Priority	Price Type	Amount	Applicable On	Created At	Status	Action
10	rule pricelist2	Increase Price	4	Fixed Price	200.0000	Product	Oct 13, 2020, 21:16:48 PM	Active	View
9	price rule 1	Increase Price	1	Percent Price	100.0000	Total Product Price	Oct 13, 2020, 21:14:47 PM	Active	View
8	rule2	Decrease Price	3	Fixed Price	30.0000	Category	Oct 13, 2020, 16:53:24 PM	Active	View
7	rule1 newestest	Increase Price	2	Fixed Price	100.0000	Product	Oct 13, 2020, 15:15:14 PM	Active	View

- The admin can view any price rule via the "**View**" button from the given price rule grid.
- Any select price rule can activate, deactivate, or delete from the price rule grid via Actions drop-down option.
- Also, the admin can **view/edit/delete** the price rule according to the requirement.

Product Price Rule

🔍 🔔 👤 admin

[← Back](#) [Delete Rule](#) [Create New Rule](#) [Save Price Rule](#)

PRICE RULE INFORMATION

Price Rule Information

Products

Price Rule Information

Price Rule Name *

Price Calculation Type *

Price Type *

Amount *

Priority *

Applicable On *

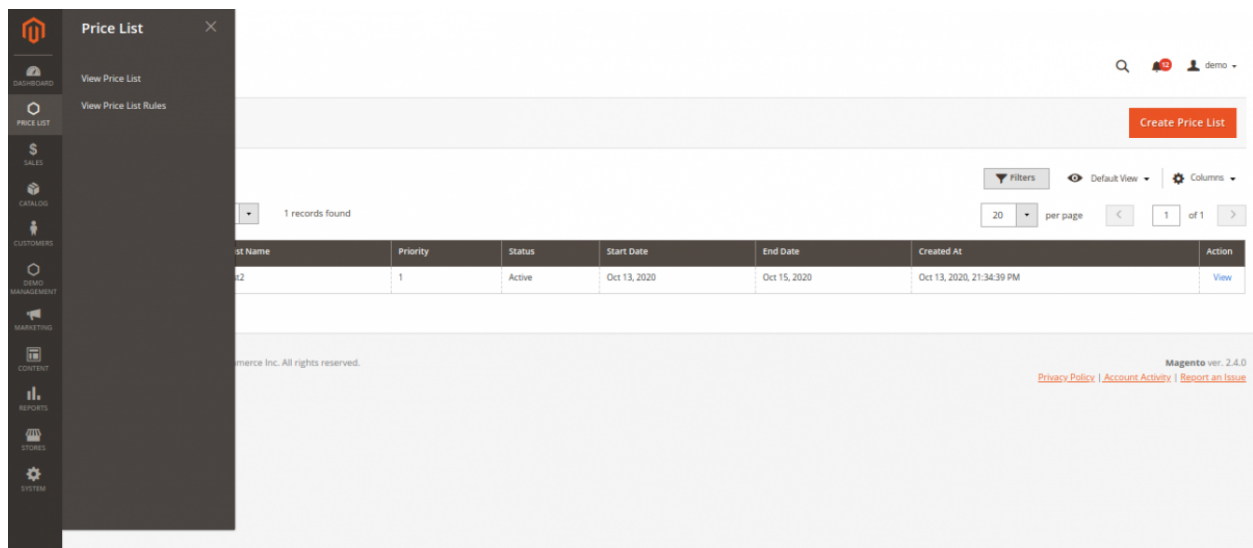
Status *

Manage Price List

The admin can **add/ view/ edit/ delete** price rules to manage Price List Rules by navigating through by **Price List ->View Price List Rules**.

Add Price List

The admin can add price rules by navigating through by **Price List -> View Price List -> Create Price List**.



Create Price List

When the admin clicks on "**Create Price List**," it will redirect to the New Price List page. Here the admin will do the settings for four sections.

- The first section **Price List Information** includes all the basic information for creating a price list. It can navigate through **Price List -> View Price List -> Create Price List -> Price List Information**.

[← Back](#) [Save Price List](#)

PRICE LIST INFORMATION
Price List Information
Rules
Customers
Customer Group

Price List Information
Price List Name *
Priority *
Start Date *
End Date *
Status *

This section has the following fields to be set for creating a price rule, the fields to be set are:

1. **Price List Name:** Here the admin gives the name of the price list.
2. **Priority:** The admin sets the priority of the price list. If multiple price list has conditions matching for the same products then the price least will apply based on priority.
3. **Start Date:** It's used for setting the starting date on which the price list will apply.
4. **End Date:** It is used for setting the ending date of the price list.
5. **Status:** In this field, the price list can activate or deactivate by the admin.
 - The second section **Rules** is for selecting rules which will include in the price list. It can navigate through **Price List -> View Price List -> Create Price List -> Rules**.

Rules

It has the following fields to be set or selected for creating a price list, the fields to be set are:

PRICE LIST INFORMATION
Price List Information
Rules
Customers
Customer Group

Rules

4 records found

20 per page
1 of 1

	Id	Title	Calculation Type	Price Type	Amount	Priority	Status
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	10	rule pricelist2	Increase Price	Fixed Price	200.0000	4	Active
<input type="checkbox"/>	9	price rule 1	Increase Price	Percent Price	100.0000	1	Active

1. Rules can select by rule checkboxes.
2. All rules can select at once for the price list by using a **mass selection checkbox**.
3. Lastly, the admin can save the price rule via the "**Save Price List**" button.
 - The third section **Customers** is for selecting customers on which the price list will apply. It can navigate through **Price List -> View Price List -> Create Price List ->**

Customers. By the following fields to set or select for creating a price list, the fields to be set are:

Price List for Products 🔍 🔔 👤 admin ▾

← Back Delete Pricelist **Create New Price List** **Save Price List**

PRICE LIST INFORMATION

Price List Information

Rules

Customers

Customer Group

Customers

[Reset Filter](#) 1 records found 20 ▾ per page < 1 of 1 >

<input checked="" type="checkbox"/>	Id	Email	Customer Name
Yes ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	1	roni_cost@example.com	Veronica Costello

1. Customers can select by the rule's checkboxes.
2. All customers can select at once for the price list by using a **mass selection checkbox**.
3. Lastly, the admin can save the price rule via the "**Save Price List**" button.
 - The last section **Customer Groups** is for selecting customer groups on which the price list will apply. It can navigate through **Price List -> View Price List -> Create Price List -> Customer Groups**.

Customer Groups

It has only one multi-select field to select one or multiple groups, on which the price list will apply.

New Price List

🔍 🔔 12 👤 demo ▾

[← Back](#) [Save Price List](#)

PRICE LIST INFORMATION

Price List Information ✎

Rules

Customers

Customer Group ✎

Customer Group

Customer Group

NOT LOGGED IN

General

Wholesale

Retailer

View and Edit Price List

Also, the admin can view/edit/delete price rules by click on **Price List -> View Price List -> View**.

View Price List

🔍 🔔 👤 admin ▾

[Create Price List](#)

Filters

Default View ▾

Columns ▾

Actions ▾ 2 records found

20 ▾ per page < 1 of 1 >

<input type="checkbox"/>	ID	Price List Name	Priority	Status	Start Date	End Date	Created At	Action
<input type="checkbox"/>	4	price list for products	2	Active	May 20, 2020	May 21, 2020	May 20, 2020, 15:20:17 PM	View
<input type="checkbox"/>	3	price_list1	1	Active	May 20, 2020	May 22, 2020	May 20, 2020, 13:35:09 PM	View

- By this admin can view any price list via the **"View"** button from the given price rule grid.
- Any select price list can activate, deactivate or delete from the price rule grid via Actions drop-down option.
- The view option opens the price list information of the price list then all the other three sections like rules, customers, and customer groups can also be viewed/edited/deleted.
- The admin can **view/edit/delete** the price list according to the requirement.

← Back

Delete Pricelist

Create New Price List

Save Price List

PRICE LIST INFORMATION

Price List Information

Rules

Customers

Customer Group

Price List Information

Price List Name * Price List for Products

Priority * 1

Start Date * 05/20/2020

End Date * 05/30/2020

Status * Active

Front End View

Please Note: If multiple price lists have conditions corresponding to the same specific product, the price list with the lowest priority value will apply. If there are multiple price rules in the price list which have conditions for the same particular product, then the price rule with the least value priority will apply.

Magento 2 Pricelist **Front End View** of Products without Price List Rules.

The image below shows two products Strive Shoulder Pack then Joust Duffle Bag. In the below image of the front view, there is no price list rule applied to both the products.

[Home](#) > [Gear](#) > [Bags](#)

Bags

Shopping Options

STYLE

PRICE

COLOR

ACTIVITY

MATERIAL

STRAP/HANDLE

FEATURES

ECO COLLECTION

PERFORMANCE FABRIC

ERIN RECOMMENDS

NEW



Items 13-14 of 14

Sort By Position



Strive Shoulder Pack

★★★★★ 2 Reviews

\$32.00



Joust Duffle Bag

★★★★★ 2 Reviews

\$34.00

Front End View of Products with Price List Rules.

Now if the price list rule has to apply then the price rule and price list have to create.

Admin can add price rules by navigating through **Price List -> View Price List Rules -> Create Rule -> Price Rule Information**. For example, we can create a price rule by setting the following sections:

1. Name: Product price Rule
2. Price Calculation Type: Increase Price
3. Price Type: Fixed Price
4. Amount: 100
5. Priority: 1
6. Applicable On: Product
7. Status: Active

The screenshot shows a web application interface for creating a price rule. The main heading is "Product price Rule". On the right, there are three buttons: "Delete Rule", "Create New Rule", and "Save Price Rule". The left sidebar contains a navigation menu with icons and labels: DASHBOARD, PRICE LIST, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, and SYSTEM. The "PRICE LIST" section is expanded, showing "Price Rule Information" and "Products". The "Price Rule Information" form contains the following fields and values:

Field	Value
Price Rule Name *	Product price Rule
Price Calculation Type *	Increase Price
Price Type *	Fixed Price
Amount *	100.0000
Priority *	1
Applicable On *	Product
Status *	Active

- As the rule applies to the product, therefore, the product section will be also set. It can be navigated through **Price List -> View Price List Rules -> Create Rule -> Products**. In this, the above two products Strive Shoulder Pack then Joust Duffle Bag selected for the price rule.

[← Back](#) [Delete Rule](#) [Create New Rule](#) [Save Price Rule](#)

PRICE RULE INFORMATION

Price Rule Information

Products

Products

[Search](#) [Reset Filter](#) 7 records found

20

per page

1

of 1

<input checked="" type="checkbox"/>	ID	Name	SKU	Price
<div style="display: flex; align-items: center;"> <input type="checkbox"/> <div style="margin-left: 5px;">Yes ▼</div> </div>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="From"/> <input type="text" value="To"/>
<input checked="" type="checkbox"/>	1	Joust Duffle Bag	24-MB01	\$34.00
<input checked="" type="checkbox"/>	2	Strive Shoulder Pack	24-MB04	\$32.00
<input checked="" type="checkbox"/>	3	Crown Summit Backpack	24-MB03	\$38.00
<input checked="" type="checkbox"/>	4	Wayfarer Messenger Bag	24-MB05	\$45.00
<input checked="" type="checkbox"/>	36	Aim Analog Watch	24-MG04	\$45.00
<input checked="" type="checkbox"/>	37	Endurance Watch	24-MG01	\$49.00
<input checked="" type="checkbox"/>	38	Summit Watch	24-MG03	\$54.00

- By adding the price rule, the price list will add by navigating through **Price List -> View Price List -> Create Price List-> Price List Information**. For example, we can create a price list by setting the following sections:

Price List Information

- Price List Name: Price List for Products.
- Priority: 1
- Start Date: 05/20/2020
- End Date: 05/30/2020
- Status: Active

← Back

Delete Pricelist

Create New Price List

Save Price List

PRICE LIST INFORMATION

Price List Information

Rules

Customers

Customer Group

Price List Information

Price List Name * Price List for Products

Priority * 1

Start Date * 05/20/2020 📅

End Date * 05/30/2020 📅

Status * Active ▾

- After this, the rules will select for the price list by navigating through **Price List -> View Price List -> Create Price List-> Rules**. For example "Product price Rule" is select for the price list.

Rules

Customers

Customer Group

<input type="checkbox"/>	Id ↑	Title	Calculation Type	Price Type	Amount	Priority	Status
Any ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	1	Product price Rule	Increase Price	Fixed Price	100.0000	1	Active

- After this the customers will be selected for the price list by navigating through **Price List -> View Price List -> Create Price List-> Customers**.

[← Back](#)
[Delete Pricelist](#)
[Create New Price List](#)
[Save Price List](#)

PRICE LIST INFORMATION

Price List Information
Rules
Customers
Customer Group

Customers

Search

[Reset Filter](#)

1 records found

20 per page

< 1 of 1 >

<input checked="" type="checkbox"/>	Id	Email	Customer Name
Yes			
<input checked="" type="checkbox"/>	1	roni_cost@example.com	Veronica Costello

- By this the customer groups will be selected for the price list by navigating through **Price List -> View Price List -> Create Price List-> Customer Group**. For example "General" group is selected from the multi-select for the price list.

PRICE LIST INFORMATION

Price List Information
Rules
Customers
Customer Group

Customer Group

Customer Group

NOT LOGGED IN
General
Wholesale
Retailer

As the price list named "Price List of Products" is created which includes a price rule named "Product price Rule". The price list rule for the two products Strive Shoulder Pack and Joust Duffel Bag will be applied after the price list and the rule will be activated. To see the above-created price list rule, the login will be done from the respective customer credentials.

The front view of the products with the price list and the activated rule is shown below:

Bags

Shopping Options

- STYLE
- PRICE
- COLOR
- ACTIVITY
- MATERIAL
- STRAP/HANDLE
- FEATURES
- ECO COLLECTION
- PERFORMANCE FABRIC
- ERIN RECOMMENDS
- NEW



Items 13-14 of 14

Sort By [Position](#)



Strive Shoulder Pack

★★★★★ 2 Reviews

\$132.00



Joust Duffle Bag

★★★★★ 2 Reviews

\$134.00

Support

That's all for the **Pricelist** extension. Moreover, if you have any queries or suggestions regarding the extension then you can get back to us at [webkul.uvdesk.com](mailto:webkul@uvdesk.com).