



SOFTWARESILOS

Pricelist

PDF Manual

MODULE

pricelist

LAST UPDATED

2026-03-29

Named Pricelist Management

Pricelist · </pricelist/features/named-pricelists>

Organize product prices into named containers that act as logical pricing units.

Overview

Named pricelists are **containers** that group product prices together under a descriptive name. Instead of assigning individual prices to customers/groups, you create pricelists like "Wholesale 2025" or "VIP Tier" and manage entire pricing structures as units.

Key Advantages

1. Logical Organization

- Group prices by business logic (season, tier, region, contract)
- Easy to find and manage related prices
- Clear naming conventions

2. Bulk Operations

- Activate/deactivate entire pricing structures instantly
- One toggle affects thousands of products
- Schedule future campaigns

3. Date-Based Control

- Set from_date/to_date on container
- Automatic activation/deactivation
- No manual intervention

4. Priority Management

- Each pricelist has priority value
- Control which pricing wins conflicts
- Fine-grained resolution

Pricelist Container Fields

Name (Required)

Descriptive identifier for the pricelist.

Naming Conventions:

- **Temporal:** "Q1 2025 Pricing", "Summer Sale 2025"
- **Segment:** "Wholesale Bronze", "VIP Gold Tier"
- **Regional:** "US Standard", "EU VAT Pricing"
- **Contract:** "Contract - ACME Corp 2025"
- **Campaign:** "Black Friday 2025", "Flash Sale #42"

Best Practices:

- Include year for time-bound pricing
- Include segment/tier for clarity
- Avoid generic names ("Test", "New", "Pricing")

Is Active (Boolean)

Toggle pricelist on/off without deleting.

Use Cases:

- **Inactive during setup:** Prepare pricelist, activate when ready
- **Temporary disable:** Turn off problematic pricelist quickly
- **Seasonal rotation:** Deactivate winter pricing, activate summer

Effect:

- Active = Yes: Pricelist evaluated for customer matching
- Active = No: Pricelist completely ignored

Priority (0-999)

Numeric value for conflict resolution.

Default: 0 **Range:** 0-999 **Rule:** Higher priority wins

Recommended Hierarchy:

- 0-9: Base pricelists
- 10-19: Standard pricelists
- 20-29: Promotional pricelists
- 30-39: VIP/Contract pricelists
- 40+: Emergency overrides

Example:

- "Standard Wholesale" (Priority 15)
- "Summer Campaign" (Priority 25) → Overrides standard during summer
- "VIP Contract" (Priority 35) → Always wins for VIP customers

From Date / To Date

Date range for automatic activation/deactivation.

Format: YYYY-MM-DD or NULL

Scenarios:

Permanent (Both NULL):

```
from_date: NULL
to_date: NULL
```

Active forever (or until manually deactivated).

Future Start (From Date set):

```
from_date: 2025-06-01  
to_date: NULL
```

Activates June 1st, runs forever.

Fixed Campaign (Both set):

```
from_date: 2025-11-29  
to_date: 2025-12-02
```

Black Friday campaign, auto-expires after Cyber Monday.

Grace Period:

```
from_date: 2025-01-01  
to_date: 2026-01-31
```

Annual contract + 1 month grace period for renewal.

Website ID

Website scope for multi-website installations.

Options:

- Specific website (US Website, EU Website)
- All websites (website_id = 0)

Use Case:

- US Website: USD pricing
- EU Website: EUR pricing with VAT
- UK Website: GBP pricing

Is Base Pricelist (Boolean)

Designate as fallback pricelist for website.

Rules:

- Only ONE base pricelist per website
- Enforced by `enable_base_pricelist_validation`
- Lowest priority (usually 0)
- No matching attributes (applies to everyone without specific pricelist)

Purpose:

- Ensure all customers see some pricing
- Prevent "no price" situations
- Fallback for new customers

Customer Matching Attributes

These fields enable automatic customer assignment.

Customer Group ID

Match by Magento customer group.

Example:

- Group 2 = Wholesale
- All wholesale customers get this pricelist

Company Name

Match by company field in customer account.

Example:

- Company: "ACME Corporation"
- All ACME employees get contract pricing

Matching Mode:

- Loose (`match_exact_type = No`): "ACME" matches "ACME Corp"
- Exact (`match_exact_type = Yes`): Must be exactly "ACME"

Tax/VAT Number

Match by tax identification number.

Example:

- Tax: "DE123456789"
- German VAT-registered businesses

Postcode

Match by billing/shipping postcode.

Example:

- Postcode: "90210"
- Beverly Hills residents

Region

Match by state/province/region.

Example:

- Region: "California"

- California-specific pricing

Country

Match by country code.

Example:

- Country: "US"
- United States pricing

Multi-Attribute Matching:

All filled attributes must match (AND logic).

Example:

```
Customer Group: Wholesale (2)
Country: US
Region: California
```

Only wholesale customers in California, USA match.

Database Structure

Table: pricesystem_pricelist

```
CREATE TABLE pricesystem_pricelist (
  id INT PRIMARY KEY AUTO_INCREMENT,
  name VARCHAR(255) NOT NULL,
  is_active TINYINT DEFAULT 1,
  priority INT DEFAULT 0,
  from_date DATE DEFAULT NULL,
  to_date DATE DEFAULT NULL,
  website_id INT NOT NULL,
  is_base_pricelist TINYINT DEFAULT 0,

  -- Customer matching attributes
  customer_group_id INT DEFAULT NULL,
  customer_company VARCHAR(255) DEFAULT NULL,
  customer_tax VARCHAR(255) DEFAULT NULL,
  address_postcode VARCHAR(255) DEFAULT NULL,
  address_region VARCHAR(255) DEFAULT NULL,
  address_country VARCHAR(2) DEFAULT NULL,

  created_at TIMESTAMP,
  updated_at TIMESTAMP,

  FOREIGN KEY (website_id) REFERENCES store_website(website_id),
```

```
FOREIGN KEY (customer_group_id) REFERENCES
customer_group(customer_group_id)
);
```

Admin Interface

Location

Admin Panel > Catalog > Pricelists

Grid Columns

- ID
- Name
- Active (Yes/No)
- Priority
- From Date
- To Date
- Website
- Base Pricelist (Yes/No)
- Created
- Actions (Edit/Delete)

Grid Features

- Filter by name, active status, website
- Sort by any column
- Mass activate/deactivate
- Export to CSV (with add-on)

Edit Form

Tabs:

1. **General** - Name, active, priority, dates, website, matching attributes
 2. **Products** - Add/manage product prices within pricelist
 3. **Groups** - Assign customer groups
 4. **Customers** - Manual customer assignments
 5. **Users** - Admin user assignments
-

Common Workflows

Workflow 1: Annual Pricing Cycle

Goal: Replace 2024 pricing with 2025 pricing on Jan 1.

Setup:

1. **Existing:** "Wholesale 2024" (Priority 15, from_date: 2024-01-01, to_date: 2024-12-31)
2. **New:** "Wholesale 2025" (Priority 15, from_date: 2025-01-01, to_date: 2025-12-31)
3. **Result:** Auto-switch on January 1st, no downtime

Workflow 2: Promotional Override

Goal: Black Friday sale overrides standard pricing.

Setup:

1. **Standard:** "Wholesale 2025" (Priority 15, permanent)
2. **Campaign:** "Black Friday 2025" (Priority 25, from: 2025-11-29, to: 2025-12-02)
3. **Result:** Higher priority campaign wins during Black Friday, then reverts to standard

Workflow 3: Regional Expansion

Goal: Launch EU pricing alongside US pricing.

Setup:

1. **US:** "US Standard Pricing" (website_id: US, country: US)
2. **EU:** "EU Standard Pricing" (website_id: EU, country: DE/FR/IT/etc)
3. **Result:** Automatic regional pricing based on customer country

Workflow 4: VIP Program

Goal: VIP customers always get best pricing.

Setup:

1. **Standard:** Various pricelists (Priority 10-20)
2. **VIP:** "VIP Exclusive" (Priority 35, group_id: VIP)
3. **Result:** VIP pricelist always wins due to highest priority

Best Practices

Naming

- "Wholesale Q1 2025" - Clear, dated
- "Contract - ACME Corp 2025-2026" - Contract with dates
- "US Region Standard Pricing" - Region + tier
- "Test" - Too generic
- "Pricing 2" - No context
- "asdf" - Not descriptive

Priority Values

- Use consistent tiers (0, 10, 20, 30)
- Leave gaps (10, 15, 20 not 10, 11, 12)
- Document your hierarchy
- Avoid priority 999 (emergency only)

Date Ranges

- Include grace periods for renewals
- Overlap dates deliberately (e.g., campaign + standard)
- Don't leave gaps between annual cycles
- Test date transitions in staging

Activation

- Prepare inactive pricelists in advance
 - Test before activating
 - Activate during low-traffic periods
 - Monitor after activation
-

Troubleshooting

Pricelist Not Applying

Check:

1. Is Active = Yes?
2. Date range valid? (from <= today <= to)
3. Website matches customer's website?
4. Matching attributes correct?
5. Customer actually matches attributes?
6. Cache cleared?

Multiple Pricelists Conflict

Expected! Use priority system.

Check:

1. Priority values set correctly?
2. Merge config (merge_pricelist_qtys) set as desired?
3. Date ranges overlap intentionally?

Can't Create Base Pricelist

Cause: Base pricelist already exists for website.

Resolution:

1. Find existing base pricelist for website
 2. Either deactivate it or set is_base_pricelist = No
 3. Then create new base pricelist
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Related Documentation

- [Creating Pricelists](#)
- [Automatic Assignment](#)
- [Priority Resolution](#)