



SOFTWARESILOS

Pricelist

PDF Manual

MODULE

pricelist

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Creating Pricelists

Pricelist · </pricelist/getting-started/creating-pricelists>

Step-by-step guide to creating your first pricelist with products and customer assignments.

Quick Start

1. **Catalog > Pricelists** → Click "Add New"
 2. Fill basic info (name, dates, priority)
 3. Configure customer matching rules OR assign groups
 4. Save pricelist
 5. Add products with prices
 6. Activate pricelist
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Creating a Pricelist Container

Step 1: Navigate to Grid

Admin Panel > Catalog > Pricelists

Grid shows existing pricelists with:

- Name
- Active status
- Priority
- Date range
- Website
- Base pricelist flag
- Actions

Step 2: Add New Pricelist

Click **Add New** button.

Step 3: Fill Basic Information

Name (Required)

Descriptive name for the pricelist.

Examples:

- "Wholesale 2025"
- "VIP Pricing Q1"
- "US Region Standard"
- "Black Friday Sale"
- "Contract - ACME Corp"

Is Active (Required)

Toggle pricelist on/off.

- **Yes:** Pricelist is evaluated for customer matching
- **No:** Pricelist ignored, even if customers match

Use Case: Prepare pricelists in advance, activate when ready.

Priority (Optional)

Numeric value (0-999) for conflict resolution.

- **Default:** 0
- **Higher = precedence**
- **Examples:**
 - 10: Standard pricing
 - 20: Promotional pricing
 - 30: VIP pricing
 - 40: Contract overrides

From Date (Optional)

Start date for pricelist validity.

- **Format:** YYYY-MM-DD
- **NULL:** Active immediately
- **Example:** 2025-06-01 (Summer campaign start)

To Date (Optional)

End date for pricelist validity.

- **Format:** YYYY-MM-DD
- **NULL:** No expiration
- **Must be >= From Date**
- **Example:** 2025-08-31 (Summer campaign end)

Website (Required)

Website scope for pricelist.

- **Default:** Default website
- **Multi-website:** Select specific site
- **Effect:** Only customers on this website see prices

Is Base Pricelist (Optional)

Designate as fallback pricelist.

- **Default:** No
- **Effect:** Customers without specific pricelist assignments get this pricelist
- **Limit:** Only ONE base pricelist per website
- **Validation:** Enforced by `enable_base_pricelist_validation` config

Customer Matching Attributes

These fields enable **automatic customer assignment**. When customers match attributes, they're auto-assigned to pricelist.

Customer Group

Match by customer group ID.

- **Example:** Group ID 2 (Wholesale)
- **Effect:** All wholesale customers get this pricelist

Company

Match by company name from customer account.

- **Example:** "ACME Corporation"
- **Loose matching:** "ACME" matches "ACME Corp" if `match_exact_type = No`
- **Exact matching:** Must be exactly "ACME" if `match_exact_type = Yes`

Tax/VAT Number

Match by tax ID.

- **Example:** "DE123456789"
- **Use Case:** EU VAT-registered businesses

Postcode

Match by billing/shipping postcode.

- **Example:** "90210"
- **Use Case:** Regional pricing by ZIP code

Region

Match by region/state.

- **Example:** "California"
- **Use Case:** State-specific pricing

Country

Match by country code.

- **Example:** "US"
- **Use Case:** Country-specific pricing

Note: Leave all matching fields empty to use manual assignment only (via groups or customer table).

Step 4: Save Pricelist

Click **Save** button.

Pricelist container created! Now add products.

Adding Products to Pricelist

Method 1: From Pricelist Edit Page

1. **Edit pricelist** → Navigate to "Products" tab
2. **Click "Add Products"**
3. **Select products** from grid (checkboxes)
4. **Set prices:**
 - Quantity: Tier threshold (e.g., 1, 10, 50)
 - Price: Price value
 - From Date: Start date (optional)
 - To Date: End date (optional)
5. **Save**

Method 2: Import/Export Add-On

Use the **CSV Import/Export Add-On** for bulk changes:

- [Pricelist CSV Import/Export Add-On](#)
- [Pricesystem CSV Import/Export \(overview\)](#)

The Magento ImportExport entity **Pricesystem Pricelist** supports importing/exporting pricelists including assignments and product rows.

Tip: Export first and use the exported CSV as your template (it matches your installed version/config).

Creating Quantity Tiers

Add multiple price entries for same product with different qty values.

Example: Graduated Wholesale Pricing

Pricelist: "Wholesale 2025" Product: "Widget Pro"

Qty Tier	Price	Description
1	\$100	Standard price
10	\$95	Bulk discount (5%)
50	\$90	Volume discount (10%)
100	\$85	Major volume (15%)

Customer orders 75 units: Gets \$90/unit (Qty 50 tier)

Configuration Required:

- `can_product_have_multi_qty_price = Yes`
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Assigning Customers to Pricelists

Method 1: Automatic Assignment (Recommended)

Configure matching attributes on pricelist (see above).

Example:

- Pricelist: "Wholesale 2025"
- Customer Group: 2 (Wholesale)
- Region: "California"

Result: All wholesale customers in California auto-assigned.

Configuration Required:

- `enable_auto_assign_customers_to_pricelist = Yes`

Method 2: Group Assignment

Pricelist Edit Page > Groups Tab:

1. Click "Add Groups"
2. Select customer groups (Wholesale, Retail, VIP)
3. Save

Result: All members of selected groups assigned.

Method 3: Manual Customer Assignment

Pricelist Edit Page > Customers Tab:

1. Click "Add Customers"
2. Search and select customers
3. Save

Result: Only selected customers assigned.

Use Case: Override automatic rules for specific customers.

Common Workflows

Workflow 1: Wholesale Pricelist

Goal: Create wholesale pricing for 2025.

1. Create pricelist:

- Name: "Wholesale 2025"
- Active: Yes
- Priority: 15
- From Date: 2025-01-01
- To Date: 2025-12-31
- Customer Group: 2 (Wholesale)

2. Add products:

- Import CSV with all products
- Or add manually via Products tab

3. Test:

- Log in as wholesale customer
- Verify prices display

Workflow 2: Seasonal Campaign

Goal: Black Friday sale (Nov 29 - Dec 2, 2025).

1. Create pricelist:

- Name: "Black Friday 2025"
- Active: Yes
- Priority: 25 (higher than standard)
- From Date: 2025-11-29
- To Date: 2025-12-02
- Customer Group: 1 (General - all customers)

2. Add products:

- Select sale products
- Set discounted prices

3. Automatic:

- Activates Nov 29
- Deactivates Dec 3
- No manual intervention

Workflow 3: Regional Pricing

Goal: US customers get USD pricing.

1. Create pricelist:

- Name: "US Standard Pricing"

- Active: Yes
- Priority: 10
- Website: US Website
- Country: US

2. Add products:

- All products with USD prices

3. Result:

- US customers see USD prices
- EU customers see different pricelist (EUR)

Workflow 4: VIP Customer Program

Goal: Top customers get 15% off everything.

1. Create pricelist:

- Name: "VIP 15% Discount"
- Active: Yes
- Priority: 30 (highest)
- Customer Group: 4 (VIP)

2. Add products:

- All products with 15% discount applied
- Or use price calculation rule if available

3. Result:

- VIP customers automatically see reduced prices

Workflow 5: Contract Pricing

Goal: ACME Corp has annual contract with specific pricing.

1. Create pricelist:

- Name: "Contract - ACME Corp 2025"
- Active: Yes
- Priority: 30
- From Date: 2025-01-01
- To Date: 2025-12-31
- Company: "ACME Corporation" (exact match)

2. Add products:

- Contract products with agreed prices

3. Renewal:

- Create "Contract - ACME Corp 2026" before expiry
- Set From Date: 2026-01-01

- Seamless transition on Jan 1
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Priority System in Action

Scenario: Customer Matches Multiple Pricelists

Setup:

- Customer: John Doe (Wholesale group, California, ACME Corp)
- Pricelist A: "Wholesale 2025" (Priority 15) - Matches group
- Pricelist B: "California Special" (Priority 20) - Matches region
- Pricelist C: "ACME Contract" (Priority 30) - Matches company

Configuration 1: merge_pricelist_qty = No

- **Result:** Only Pricelist C applies (highest priority)

Configuration 2: merge_pricelist_qty = Yes

- **Result:** Merge qty tiers from all three
 - Pricelist A: qty=1 (\$100), qty=10 (\$95)
 - Pricelist B: qty=25 (\$92)
 - Pricelist C: qty=50 (\$88)
 - **Customer gets:** qty=1 (\$100), qty=10 (\$95), qty=25 (\$92), qty=50 (\$88)
 - **Best of all lists!**
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Base Pricelist Setup

Purpose

Fallback pricing for customers without specific pricelists.

Setup

1. Create pricelist:

- Name: "Base Pricing - Main Website"
- Active: Yes
- Priority: 0 (lowest)
- Is Base Pricelist: **Yes**
- Website: Main Website
- **Leave all matching attributes empty**

2. Add products:

- All products with default prices

3. Effect:

- Customers without any pricelist → see base prices
- Customers with specific pricelist → base ignored

Validation:

- Only ONE base pricelist per website
 - System prevents creating second base pricelist if validation enabled
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Troubleshooting

Pricelist Not Showing for Customer

Check:

1. ✓ Is Active = Yes?
2. ✓ Date range valid? (from_date <= today <= to_date)
3. ✓ Website matches?
4. ✓ Customer matches attributes OR assigned via group/manual?
5. ✓ Auto-assignment enabled? (enable_auto_assign_customers_to_pricelist = Yes)
6. ✓ Cache cleared?

Wrong Prices Displaying

Check:

1. ✓ Multiple pricelists match? (check priority)
2. ✓ Merge config? (merge_pricelist_qtyys setting)
3. ✓ Product exists in pricelist?
4. ✓ Quantity tier matches cart quantity?
5. ✓ Pricesystem Core price order correct?

Can't Create Second Base Pricelist

Expected behavior!

- Only one base pricelist per website
 - Disable enable_base_pricelist_validation to override (not recommended)
 - Or deactivate existing base pricelist first
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Next Steps

- [Named Pricelist Management](#)
- [Automatic Assignment](#)
- [Priority Resolution](#)