



Quick Guide to price lists

When an employee hands in an hour in AutoPilot the cost and sales price of that hour will be obtained from the price list system.

The first criterion is hierarchical:

- Is there a price list for the project part available? If there is, it should be used
- Is there a project price list available? If there is, it should be used
- Has a current profitability index been stated? If it has, it should be used
- Is there a client price list available? If there is, it should be used
- Otherwise the general price list should be used

Notice, if price groups are activated every price list can have 3 different sales prices.

The second criterion is time:

If the particular employee cannot be found on the most recent project part / project / client or general price list, the system will simply go back in time until the employee is found. If the employee cannot be found at any point in the relevant project part / project or client price list, the general price list should be used.

Activation Dates

The activation date is the fulcrum about which the price lists pivot. Apart from the regulation of the prices, they primarily serve as a way of handling which price category the employees have from that date and onward.

When should you change the activation date?

When a change is to take effect from a certain date and the hours which lay ahead of the date are to follow the old price list, one should make a new activation date.

It is only necessary to insert the price lists and the employees for which the cost and/or sales prices have been changed. Continue with everything else as is.

How to do it?

- Go to Basics > Prices Emp. > Create price lists
- Create the activation date on the white paper
- Activate the date, blue check mark
- If you are using price categories the list will be shown now, check that the employees are stated correctly, close
- If convenient, the activation date can be marked as the main activation date of the year

Main Activation Dates

A main activation date is the activation date on which new employees are inserted. A main activation date cannot be older than 18 months and must have an activated, general price list.

General Price List

The general price list controls the cost prices and standard sales prices of the employees. Only the employees whose prices have been changed have to be on the price list.

When should you make a new, general price list?

If the salary of one or more employees and thereby the cost price changes, a new, general price list should be made on the date of change. Similarly, a new, general price list should be made when the standard sales prices are changed.

How to do it?

- Go to Basics > Prices Emp. > Create price lists
- Select the price categories (if activated) and fill in the sales prices for them
- Press [Insert all on price list] if a lot of employees are changing price, otherwise insert the relevant employees one at a time by selecting their initials in the line
- Fill in cost prices and sales prices, empty fields are NOT allowed. If necessary, press [Insert most recent valid sales price]
- Press [Activate price list]
- If no hours have been handed in after the activation date, you should go to Basics > Prices Emp. > Active price lists and recalculate the new, general price list.

Create Client / Project / Project Part Price List

A client / project / project part price list controls the sales prices of the employees for that specific client, project or project part. Only employees whose prices are specific for that client, project or project part have to be on the price list.

When can you create a client, project or project part price list?

If you have decided on special prices for a project or a project part, you have to create a project / project part price list. We do not generally recommend creating client price lists unless you do a lot of projects for this client. A client price list has to be maintained for as long as you have projects for the client.

How to do it?

- Go to Basics > Prices Emp. > Create price lists
- Select a suitable activation date and dot the wanted category. Select client / project / project part from the list.
- Press [Insert all on price list] if a lot of employees are changing price, otherwise insert the relevant employees one at a time by selecting their initials in the line
- Fill in sales prices, empty fields are NOT allowed.
- Press [Activate price list]
- If hours have been handed in after the activation date, you should go to Basics > Prices Emp. > Active price lists and recalculate

Finding a Project Part Price

The type of price list which the project part sales prices are obtained from and which activation date the price list is on, is shown on the project part card. You will find the project part card in the right click menus.

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New employee

It can be necessary to insert a new employee on the existing price lists. Please find the price lists in Basics > Prices Emp > Active price lists > Prints. If necessary, you can choose to see the project part price lists. A date is stated for every employee. This is the activation date which the price list is on. Go to the activation date, select the wanted price list and press [New employee on price list]. Now the employee can be selected in the empty line on the bottom.

