

**Product Documents (8/22/2023)**  
**pCon.basket - User Guide**

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## 1 INTRODUCTION

The topics in this section provide some basic information about pCon.basket, what it is for and what you can do with it.

### 1.1 About pCon.basket

pCon.basket was developed through collaborations between EasternGraphics and leading manufacturers and dealerships in the furniture industry. The goal was to develop a compatible and easily integrated tool suitable for all companies operating in the industry. Today the scope and use of pCon.basket reaches well beyond the boundaries of the furniture industry.

The data used by pCon.basket is based on OFML (Office Furniture Modeling Language) an open standard of the German furniture manufacturer's association (BSO). Nowadays is an accepted standard in several countries and used by the European leading manufacturers.

The traditional method of creating offers through the use of MS Excel is outdated due to its inefficiency and great limitations. This type of application presents a lot of limitations, like

- manually insert the data in to the spreadsheet including images if desired
- manually define calculation formulas and double check them
- impossibility to do reverse discount calculations
- impossibility to do margin calculations
- if groups are involved, extra effort in calculating subtotals and formatting spreadsheet
- time consuming to make offer updates, which is a usual need
- impossibility of extracting information into other applications

pCon.basket was build specifically to create offers - it facilitates the configuration and selection of articles, the structuring of articles in groups, the configuration and calculation of articles and the creation of a flexible but easy to create offer. pCon.basket can be integrated with 3rd party applications like enterprise resource planning systems (ERP), customer relationship management systems (CRM), ad hoc databases and others. This integration assures a very efficient sales value chain.

pCon.basket can be used alone or in conjunction with pCon.planner or pCon.xcad for projects where you need to create a drawing or need to specify complex products with the assistance of advanced product rules.

### 1.2 Customers

Currently we have 110+ office furniture manufactures, 40+ manufactures in other industries and thousands of dealers all over the world.

### 1.3 License Activation

pCon.basket is a commercial software which needs to be enabled through a license. The following kinds of licenses are supported:

- Standard, host-dependent license
- Dongle-based single workstation license
- Dongle-based network license
- Demo license, usually time-limited

To activate the license key you received from EasternGraphics please use the EGR-LicenseClient. You can find it in the apps of the Windows® start menu. With the EGR-LicenseClient you can activate not only pCon.basket but also all other applications of EasternGraphics. Start this tool and insert your license key. An enabler code is requested automatically in the background. You only need a connection to the internet. If you activate your license for the first time, the enabler code will be immediately sent back to your EGR-LicenseClient. If you wish a spare activation, please contact at first your local EasternGraphics team.

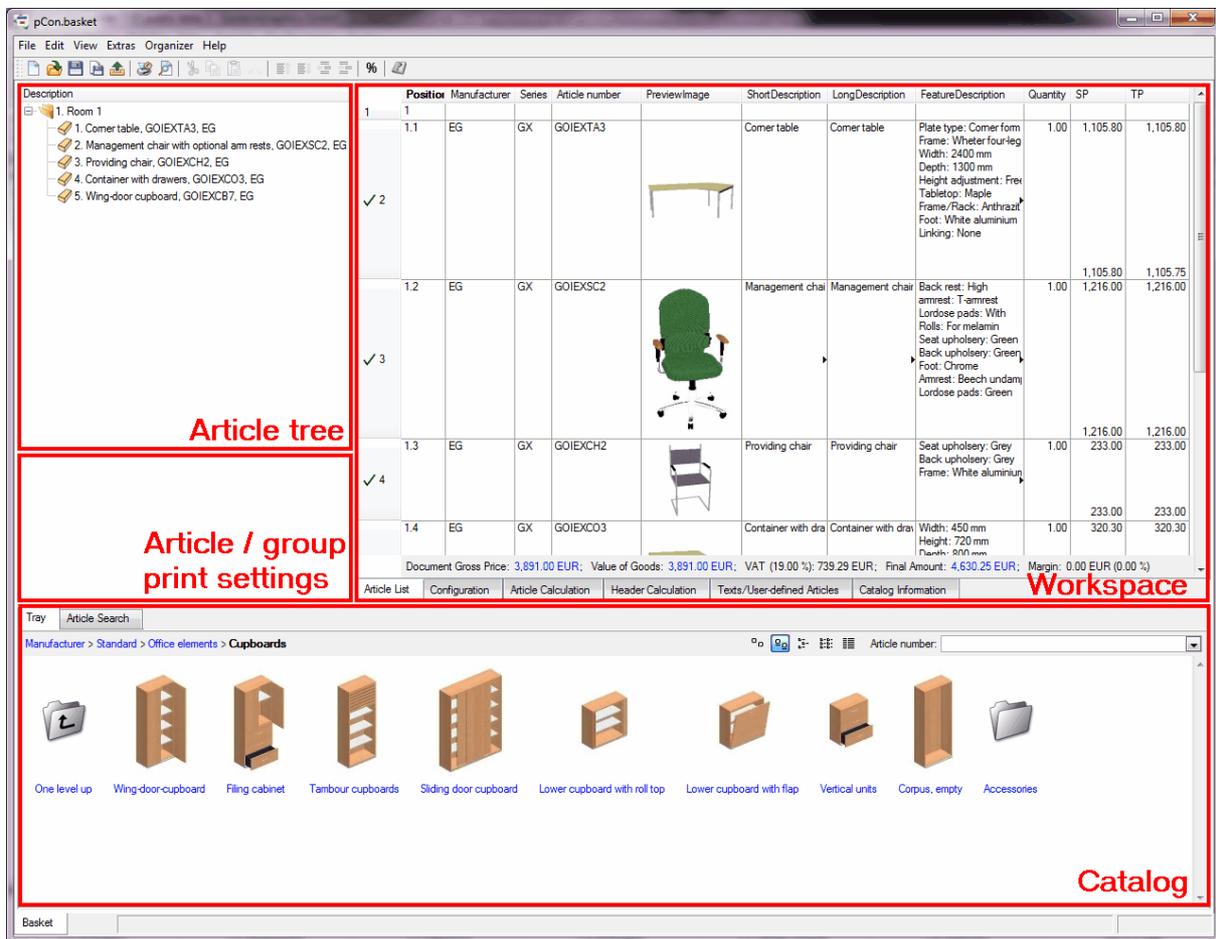
If you get a license file (\*.lic) you have to copy it into the directory etc/licenses of the pCon.basket installation. If you are using license templates (\*.lit) not available in the standard pCon.basket distribution, please install them in etc/licenses/templates.

In case of dongle-based single workstation licenses please install the dongle driver.

Please contact your local EasternGraphics team for further information.

## 2 USER INTERFACE

The user interface is divided into four main sections.



*pCon.basket interface*

### Catalog

The catalog is available in the lower part of the screen. Articles are selected here. Articles are catalogued in a tree structure. Each series can have several subcategories and its structure is based on the technical and commercial characteristics of the articles that it is made up of. Articles can be selected graphically or by directly entering the article code. The catalog also offers the option of searching for an article using a partial code.

### Article tree

The article tree is located in the left part of the screen. It can be structured with folders, each representing a group containing subgroups or articles. Groups have advanced calculations and print options. Detailed article and group information can be found on the workspace area.

### Article / group print settings

The article/group print setting is located below the article tree. Its contents are only visible when an article or group is selected. It enables you to define several printing settings for the selected article tree elements, for example where to place page breaks or if to display a group's total.

### **Workspace**

Contains a series of interchangeable tabs located at the bottom which allow you to manipulate the articles selected in the workspace. There are 5 sub areas: article list, article configuration, price management, text information management and catalog information.

## 3 CREATE OFFER

Every offer you create is saved in a separate project file. The standard pCon.basket file format will be saved with the .obk extension. This topic shows how to create and save a project, what project settings can be made and gives hints for naming conventions and storage of the projects.

### 3.1 New offer

To create a new offer, you can choose one of the following methods:

- Select *File* → *New*
- Key combination *CTRL + N*
- Select the  button on the upper tool bar

If a new offer is created, the open one will be closed. This occurs automatically if the last change was saved, otherwise the application will ask if the offer should be saved. An affirmative answer will allow you to save the offer under its already given name and open a new offer, if you select 'No' all changes will be lost.

To open more than one offer at the same time, open another pCon.basket application. Having two or more pCon.basket applications running enables you to copy positions from one application to the other.

### 3.2 Open offer

You can open an offer in the following ways:

- Select *File* → *Open...*
- Key combination *CTRL + O*
- Select the  button on the upper tool bar

When you decide to open an existing offer, a dialogue window will appear where you can choose the file. If you haven't save the changes to the current offer when you open a new one, the program will ask if you want to save the changes and will then open the requested offer.

You can open two types of files:

- .obk, is the native pCon.basket format. pCon.xcad is able to export files in this format.
- .fml, is the native pCon.planner format. See also [pCon.planner](#) for an alternative method of importing articles from pCon.planner.

**NOTE:** When you open an .fml file with pCon.basket you have to execute the command Extras → Convert Planning Articles. This procedure allows you to convert the .fml file to a fully functional pCon.basket offer.

### 3.3 Save offer

You can save an offer in the following ways:

- Select *File* → *Save*
- Key combination *CTRL + S*
- Select the  button on the upper tool bar

If the offer already has a name, it will automatically be saved under this name. If the offer still has not been named, a dialogue window will appear where you can specify the file name and select the destination folder.

You can save an offer under a new name through:

- Select *File* → *Save As...*

#### 3.3.1 Naming convention

It's important that your dealership defines a naming convention standard for all offers. This naming should be used by all sales reps. It will allow you to quickly identify the offers and it's especially important if you work in a bigger dealership with several sales reps.

We propose the following model tested by many dealers:

SalesRepCode\_OfferNumber\_Date\_ClientName\_BriefDescription.obk

- *SalesRepCode* is a two digit code univocally representing a sales rep. For example 'FS' for 'Frank Sinatra'
- *OfferNumber* is a sequential number maintained by each sales rep
- *Date* is the date of the offer creation in format ddmmyyyy
- *ClientName* is the name of the client
- *BriefDescription* is a short comment on the project to quickly identify several projects for the same customer, otherwise the only other two differentiators would normally be the offer number and the date, which none of them is descriptive.

Let's look this example "FS\_301\_281107\_MGMCasino\_MeetingRoom3rdFloor.obk". This project was created by Frank Sinatra with offer number 301 on 28/11/07 for a Meeting Room on the 3rd floor of the MGM Casino. If you have different versions of the same offer it's an important to create a new file name by updating the date when the new version was created. This assures you keep an historical track of the changes.

Another advantage of this naming convention is the fact that you can use the normal Windows search to filter your offers. For example, if you want to see only offers created by Frank Sinatra you could do search with the string 'FS\*.obk'. If you want to search all offers done for MGM Casino you can search with the string '\*MGMCasino\*.obk'.

A little structure in naming offers provides your dealership important benefits in the long run.

### 3.3.2 Offer storage

Nowadays most sales reps have their own laptops, which they will use to create offers. It's important to consider a method to ensure that the offers created are centrally stored and that a backup mechanism is in place. If a laptop is stolen or damaged you risk losing important historical and ongoing work information that can be impossible or very expensive to recover.

There are two main ways to back up your laptops, manually or automatically. The manual process consists of having the laptop user manually saving in a centralized server all offers with a regular frequency. The automatic process assures synchronization between a specific folder in the laptop and the server each time the computer is connected your company's network.

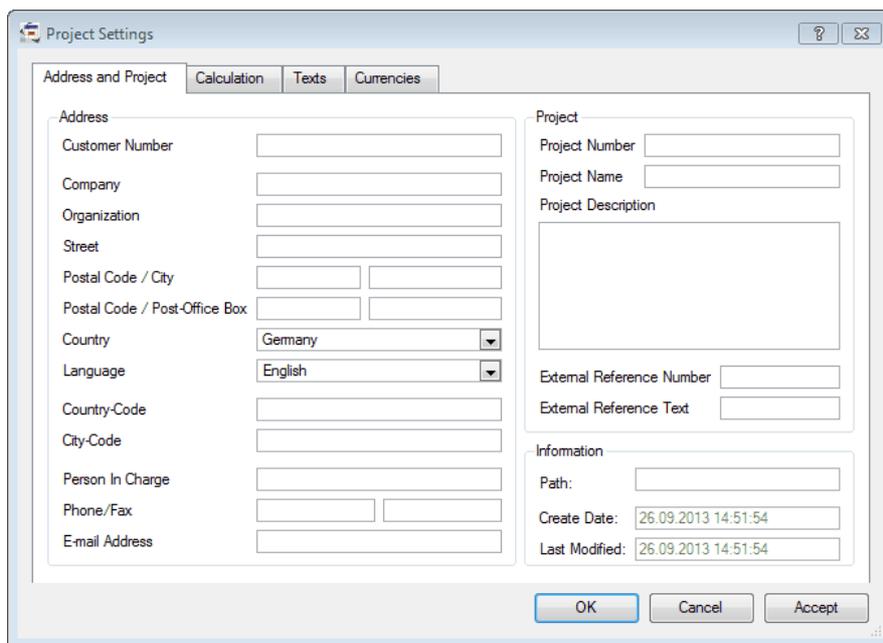
Contact the member or organization responsible for your network administration to define the best process for your dealership.

## 3.4 Project properties

Defining a project's properties is an important task you should do at the start of each new proposal. Many of the properties you'll define here are used by pCon.basket in different occasions, like during the report creation. You can call the window by selecting *Edit* → *Project Settings*.

### Address and Project

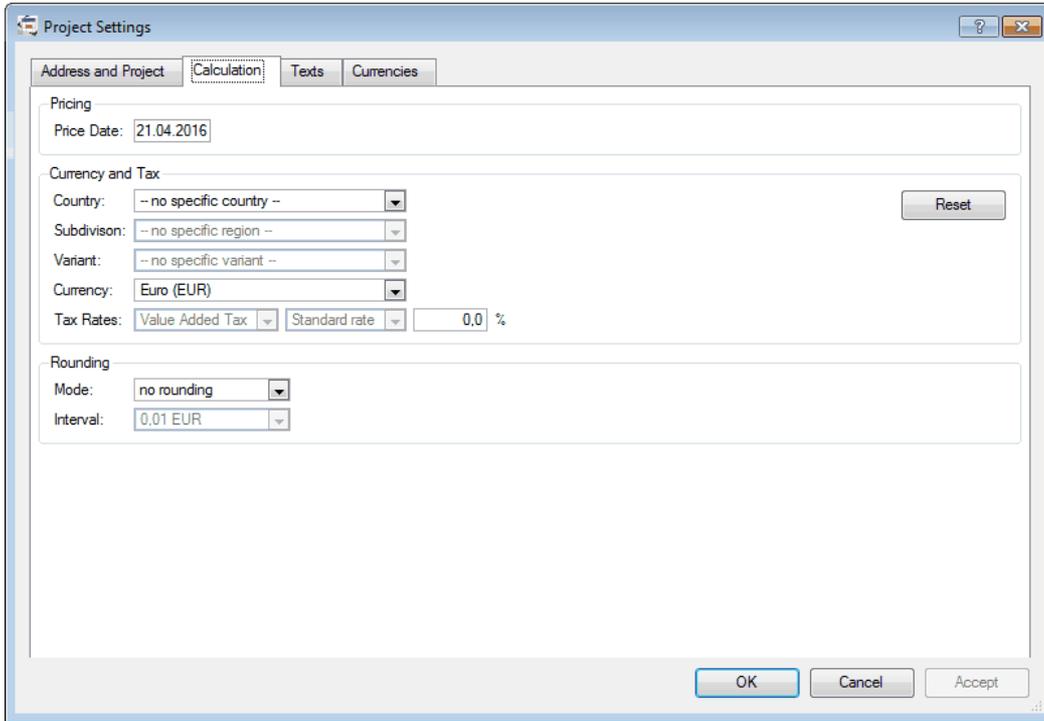
The Address and Project tab can be configured with general offer information, many of these fields will be later used in the automatic offer creation report. The three fields in the 'information' section will be automatically filled out by pCon.basket after the first time the user saves a file.



*Project properties Address and Project*

## Calculation

The Calculation tab allows you to specify financial information that will be applied to all articles inserted in the offer. You can define the [price date](#), the country for which you want to prepare the offer, a project's currency, the rounding of prices and the VAT. Please see [Calculation](#) for more information regarding discounts and upcharges. For details on the rounding settings see chapter [A side note to rounding](#).



Project Settings

Address and Project | **Calculation** | Texts | Currencies

Pricing  
 Price Date: 21.04.2016

Currency and Tax  
 Country: -- no specific country --  
 Subdivision: -- no specific region --  
 Variant: -- no specific variant --  
 Currency: Euro (EUR)  
 Tax Rates: Value Added Tax | Standard rate | 0.0 %

Rounding  
 Mode: no rounding  
 Interval: 0,01 EUR

Reset

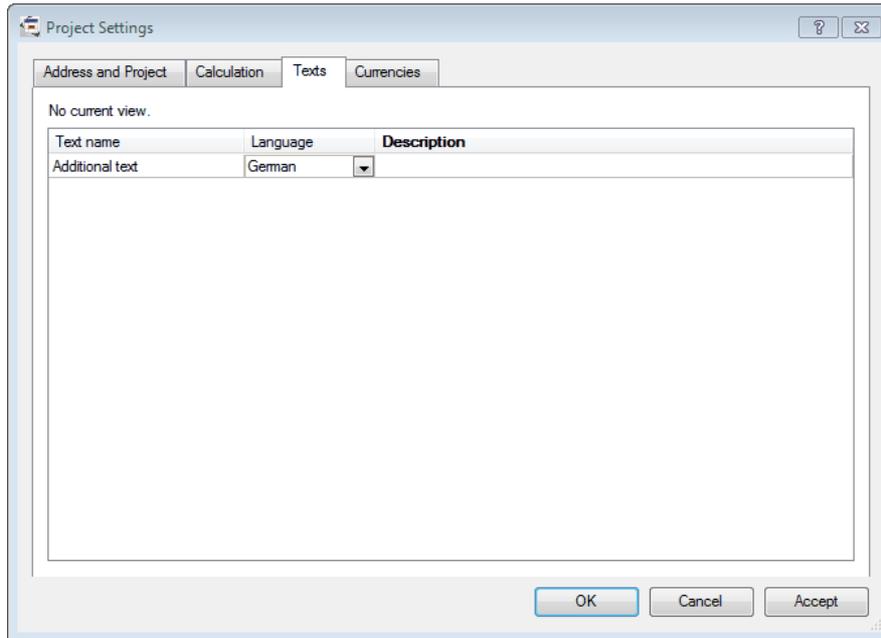
OK | Cancel | Accept

*Project Properties Calculation*

**NOTE:** The selection of a country specific tax scheme is only available with a license for the [additional module taxation schemes](#).

## Texts

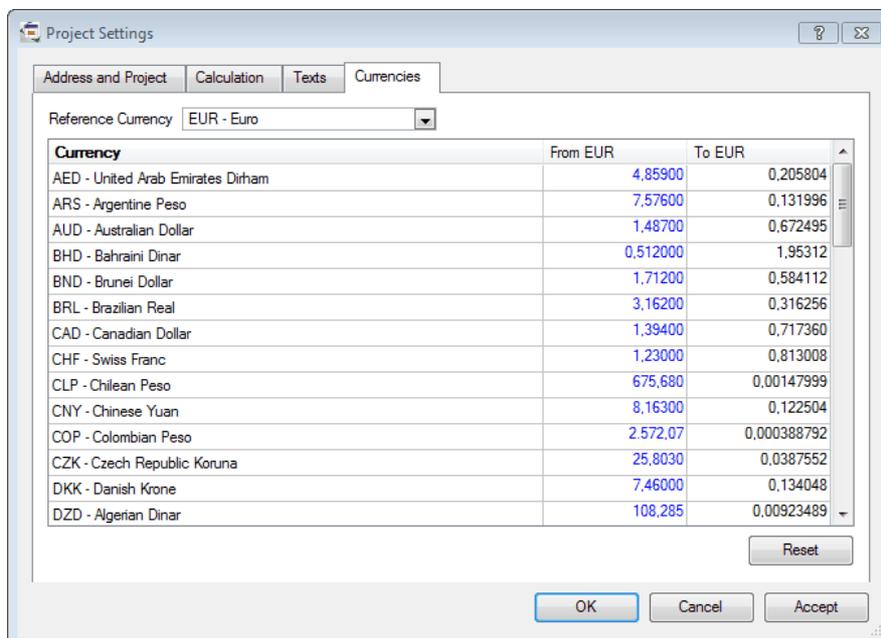
The Texts tab allows you to enter additional text. First, the language is chosen and then the text is typed. The additional text appears in the offer header before the article list.



*Project Properties Texts*

## Currencies

The Currencies tab allows you to change the exchange rates used for this project (local exchange rates). If you want to update the exchanges rates to the exchanges rates set in the [pCon.basket settings](#) (global exchange rates) you have to press the button 'Reset'.



*Project Properties Currencies*

## 4 INSERT ARTICLES

Articles can be inserted in an offer following two methods

- by importing articles from pCon.planner/pCon.xcad
- by inserting individual articles directly from pCon.basket's catalog.

The normal process will be to import articles from the other two pCon modules since there you can use the power of advance product configuration and the possibility to provide customers with renders.

### 4.1 Import

Importing articles from pCon.planner or from pCon.xcad will be the most common way to create your article list. By using these two applications you can take advantage of advanced product rules and provide professional looking renders with the offer.

Please see section [Summarizing articles](#) on how to summarize articles you have just imported into pCon.basket.

#### 4.1.1 pCon.planner 8

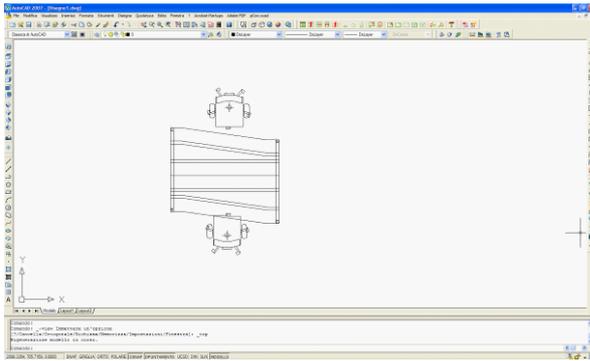
In pCon.planner open the desired project (.dwg) file and select *Configuration* → *Copy Article List*. This command will copy all the commercial information into the clipboard. Open pCon.basket and simply paste this data into the article tree section, you can do this by right clicking on your mouse and selecting *Paste* or simply through the standard paste shortcut *CTRL + V*.

Another way is to directly send the article list to pCon.basket. On the tab *Configuration* go to *Article List*. A settings dialogue is shown. Activate the option *Send to pCon.basket* and press the *OK* button. pCon.basket is started automatically and the articles are shown in the article tree.

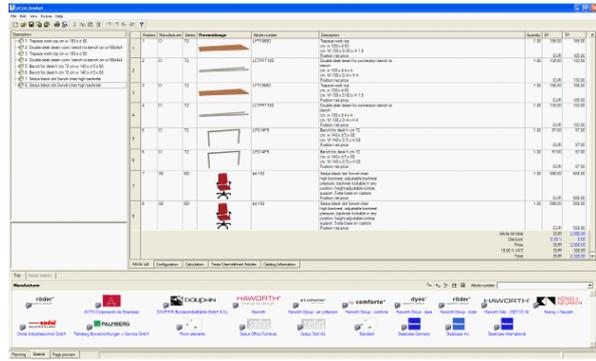
If you have defined price settings in pCon.basket (see [Vendor discounts](#)) you have to update the imported articles to activate the discounts (see [Update Basket Articles](#)).

#### 4.1.2 pCon.xcad

Open the desired AutoCAD project containing OFML data, synchronize the article list and select the *File* → *Export* command. Select the .obk format, pCon.xcad will export the commercial data into the native pCon.basket format. Open basket and simply load the .obk file.



AutoCAD/xcad project



Project imported in pCon.basket

Another method is to copy the desired articles in the article list of pCon.xcad. Those articles can then be pasted into the article list of pCon.basket, for example by using the shortcut **CTRL + V**.

If you have defined price settings in pCon.basket (see [Vendor discounts](#)) you have to update the imported articles to activate the discounts (see [Update Basket Articles](#)).

## 4.2 Catalog

Typically you'll have the need to insert articles from the catalog if:

- You have to build a simple proposal where a rendered scene is not needed. You only need pCon.basket to create an offer.
- You have imported an article list from pCon.planner or pCon.xcad and you just need to add or update articles.

### 4.2.1 Navigate catalog

Articles are organized in the catalog following a tree structure. Manufacturers are on the first level, followed most of the time by the product series. The series and articles can be viewed in the catalog through an image, making it easy to search and select. To move through the various available catalogues select the image representing the desired catalog by left clicking it. Notice that next to the manufacturer logo there is a folder icon, it represents a container of other folders and articles.

To move up one or more catalog levels you have the following two options:



One level up

Manufacturer > Sedus Office Furniture > Accessories

Select the icon One level up, on the left of the catalog.

Select an entry on the active path in the catalog's toolbar. The path shows the currently open catalog, the series and other sub folders selected so far. It quickly tells you how deep on the catalog tree you

are. You can jump through various catalog levels by clicking on the desired level.

#### 4.2.2 View catalog

You can edit the view of the catalog series and articles by selecting the buttons located in the upper part of the catalog



Only Symbols: the articles are only viewed graphically



Large Symbols and Text: the articles are viewed graphically as above but a brief explanatory text is included



Small Symbols and Text: the articles are viewed graphically as small icons and a brief explanatory text is included

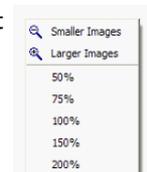


List: the articles are viewed with their text and without images



List and Description: the articles are viewed with their code, without images and with a description

You can also have control over the dimension of the icons in the catalog, to adjust them right click on the mouse anywhere in the catalog and a new window will appear giving you several visualization options.



#### 4.2.3 Insert article

In pCon.basket, you can insert an article by using the electronic catalog or through the article search. An article is interactively selected as follows:

- Open the folder that contains the desired article
- Select the article by clicking on it
- The article is entered into the tree structure.

pCon.basket enters articles using the following rules:

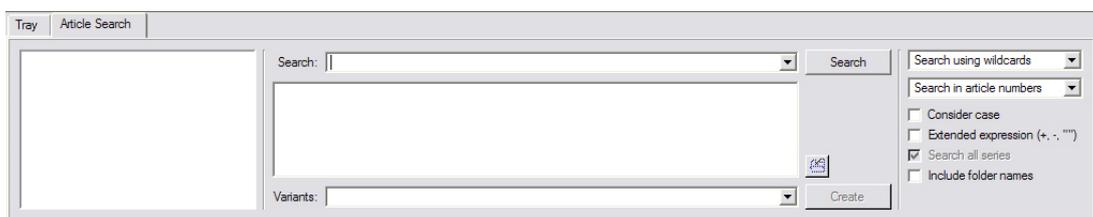
- If no article in the offer tree structure is selected, the new article will be entered in the last position of the tree structure

- If an article in the tree structure is selected, the new article will be entered directly after the highlighted article at the same level
- If a folder is selected, then the article will be entered inside the folder

The newly inserted article becomes automatically selected.

### 4.3 Article search

The article search allows you to define search parameters in order to find an article. This procedure is useful when you don't know the location of a needed article in the catalog. An article search can be activated by selecting the *Article Search* tab located in the top left of the catalog.



*Article search window*

To carry out an article search, perform the following operations:

- Define the search specifications: enter a key word or phrase in the Search field.
- Define the search options: select the search parameters (exact word, partial text, etc...).
- Start the search: press the Search button to the left of the field for the search text.

The table will show the retrieved results. For each article found, the article number, the name of the series that it belongs to and a descriptive text are shown. If the search provides more than one result, the first line is automatically selected and the corresponding image is viewed.

To enter the article found in the offer tree structure, double click or hit the *Create* button on the side of the list of articles found. The article will be entered based on the previously described rules.

**NOTE:** The search starts automatically at the current manufacturer selected in the catalog. Articles in other manufacturer catalogues will not be part of the search.

The  button located to the right of the results table allows the user to go directly to where the article is found in the catalog. The *Variant* field allows the user to refine his/her search based on the article's variant codes.

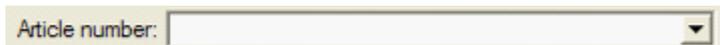
### 4.3.1 Search Options

You can personalize your search through the usage of several options:

- *Search using wildcards*; if you only know one part of the article code, you can search for it using a wild card \* or ? to replace parts of the article code.
- *Exact search*; this search will find the article that exactly satisfies the search term. The text must be complete and correct.
- *Exact search (substrings)*; this option is similar to the above but this time the results list shows articles whose names include part of the typed string.
- *Fuzzy search*; in this case, the search procedure also provides results that differ slightly from the indicated search term. This option can potentially produce a successful search when you make a typo or don't remember the exact full name of an article. All the terms that are generated by adding or removing a letter at the end of the search are also considered.
- *Search in article numbers*; the program will look for the part of the code entered in the article code.
- *Search in catalog texts*; the search parameters will be applied to the article text included in the catalog.
  - *Consider case*; by selecting this option, the search terms entered will be case sensitive.
  - *Extended expression (+, -, ""')*; in an advanced search, the symbols in parenthesis can be used as operators.
  - *Search all series*; the program will look for the search term in all visible supplier categories selected. This option is not always available in the program.
  - *Include folder names*; with this option, the search is performed by articles that meet the search requirements and by folder.

### 4.3.2 Article number

All articles are identified by an article number. If you know the exact code for an article, you can enter it directly in the field on the upper right hand corner above the catalog name bar.



The image shows a search input field with the text 'Article number:' followed by a rectangular box. The box is empty and has a small downward-pointing arrow on its right side, indicating it is a text input field.

*Article number search field*

You can directly enter the article number following the steps below:

- Select a manufacturer on the highest level of the structure. An article number can be chosen only when a manufacturer folder is open. The search is carried out on all series.

- Now, you can enter an article code in the Article Number field.
- When you find the desired article code confirm your selection by hitting ENTER. The article will be added to the offer.
- The last entered article number stays in the field until after the article is added to the offer and can be edited or overwritten.

**NOTE:** When you start to enter a code in the article number field, you will be automatically offered the article number nearest to the already entered string.

#### 4.4 User articles

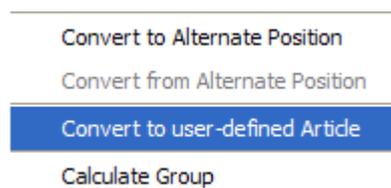
User articles are articles created by the user, which have total control over all of the article's commercial properties, which is not the case with a normal catalog article. You can use a user article to enter articles or services which are not available in the catalog, they may include:

- a special article, like for example an article with a special shape or a special finish
- an article for which you don't have an OFML catalog in pCon.basket. If you represent other manufacturers that still don't have their data in the OFML format you can create them as a user article.
- Special services you need to charge to your customers which are not dependent on the value of other article. For example if you want to charge a transportation or installation fee, which is independent from value of the other articles in the offer.

User articles will not have any type of intelligence associated with them, since this type of intelligence has to be previously codified in OFML.

To create a special article use *F4*, select *Edit* → *New user defined article* or right click on the article tree area and select *New user defined article*. You can visually detect a special article through the article's icon .

It is also possible to convert a standard OFML article into a user-defined article. For example you want to create a special article which is similar to a standard OFML article, only one finish is a special one or you want to add tax information which are not part of the OFML data. In that case you may don't want to insert all information for manufacturer, series, short text, long text and so on. You can insert the standard OFML article, select it and make in the article tree a right mouse button click on it, so the context menu opens. Select *Convert to user-defined Article*. The connection to the OFML article is lost (also to the intelligence of this article is lost), but now you can edit the information of this article and change the necessary values.



*Context-menu; Convert to user-defined Article*

Management chair			
1	Text ID	Text name	Description
		Manufacturer Id	English - EG - Standard
		Series Id	English - GX - Büroelemente
		Article Number	Base - GOIEXSC2
		Net Weight	KGM - kilogram - 43,2
		Quantity	12,00
		Purchase Gross Price	EUR - 366,00
		Sales Price	EUR - 366,00
		ECO-Contribution	Seat (plastics) (0,096 EUR/KGM)
		Value Added Tax	Standard rate (19,6 %)
<input checked="" type="checkbox"/>	10	Short text	German - Management chair
<input checked="" type="checkbox"/>	20	Long text	German - Management chair
<input checked="" type="checkbox"/>	30	Variant text	German - Back rest: high Amrest: T-Amrest Headrest: Yes Seat upholstery: Sky Back upholstery: Sky Foot: Chrome
<input checked="" type="checkbox"/>	40	reserved (not for use at this mo	German -
<input checked="" type="checkbox"/>	71	Special Model Information	German -
<input checked="" type="checkbox"/>	@add	Additional text	German -

Article List | Configuration | Article Calculation | Header Calculation | **Texts/User-defined Articles** | Catalog Information

*Tab Texts/User-defined articles after conversion of a standard OFML article*

**NOTE:** The availability of the function Convert to user-definde article depends on whether you have pCon.basket license type B.  
 The fields Net Weight and ECO-Contribution are only visible if you have a license for the [additional module taxation schemes](#) and selected the country France with the variant with ECO-Contribution in the Project Settings.

A line break inside a field is done by pressing *Shift + Enter* or *Alt + Enter*. For editing the text inside a field make a double click to the field or press *F2* when the field is selected.

## 5 ARTICLE LIST

The article list gives you detailed information about the articles contained in pCon.basket. The structure is organized in cells, each row represents an article and each column different information like quantity or description.

The article list makes it easy to have a quick overview of the complete offer and provides an easy way to perform quality control, given the fact that the images represent the finishes of the final articles.

On the left side of the article list in front of the article numbers different icons are visible which give information about the update state of this article. For further information please have a look to section [Update Basket Articles](#).

	Position	Manufacturer	Series	Article number	Preview Image	ShortDescription	LongDescription	FeatureDescription	Quantity	SP	TP	
✓ 1	1	EG	GX	GOIEXCB7		Wing-door cupboard	Wing-door cupboard	Width: 800 mm Height: 2000 mm Depth: 400 mm Cupboard Sacle: Sunrou Handle: Curved metal Corpus: Alerce Front: Alerce Boards: Alerce Base: White aluminium Handle: White aluminium	1,00	1.015,90 1.015,90	1.015,90 1.015,90	
✓ 2	2	EG	GX	GOIEXD03		Container with drawers	Container with drawers	Width: 450 mm Height: 720 mm Depth: 800 mm Extension length: 0 mm Organisation: 3/3/6 Handle: Curved metal Corpus: Alerce Front: Alerce Plate: Alerce Handle: White aluminium	1,00	320,30 320,30	320,30 320,30	
✓ 3	3	EG	GX	GOIEXSC2		Management chair with	Management chair with	Back rest: High armrest: T-armrest Lordsose pads: With Rolls: For melamin Seat upholstery: Black Back upholstery: Black Foot: Chrome Armrest: Alerce Lordsose pads: Black	1,00	1.216,00 1.216,00	1.216,00 1.216,00	
✓ 4	4	EG	GX	GOIEXTA1		Table, config., slideab	Table, config., slideab	Plate type: Normal shape Frame: Wheter four-legg Width: 1600 mm Depth: 800 mm Height adjustment: Free Tabletop: Alerce Frame/Rack: Anthrazit Foot: White aluminium Linkage: None	1,00	894,20 894,20	894,20 894,20	
Document Gross Price: 3.446,40 EUR; Value of Goods: 3.446,40 EUR; VAT (19,00 %): 654,82 EUR; Final Amount: 4.101,22 EUR; Margin: 0,00 EUR (0,00 %)												

Article list

### 5.1 Default view

pCon.basket is installed with the following default columns.

- **Position;** this column shows the position of the article in the tree structure. pCon.basket distinguishes between primary positions, named with natural numbers, and secondary ones, for example "2.1".
- **Manufacturer;** all suppliers appear in the software with a identification abbreviation. The manufacturer is unique.
- **Series;** this column specifies the product series of the article with an identification code. The product series abbreviation is unique.
- **Article Number;** the article numbers describe only one article and its configuration.

- *Description*; the information on the article is included here. This set up allows you to see the long description and characteristics of the article.
- *Quantity*; the quantity of the articles is specified here and can be manually changed. Just select the corresponding cell and type the new quantity value, note that the article price will be automatically updated.
- *Price*; the net price is the price of the article without any discounts and before VAT.
- *Total Price*; the total net price is the net Price times the specified quantity.
- *Image Preview*; this column contains the image preview of the selected article. The finishes in the drawing always match the finishes selected during product configuration. This allows you to do a quick visual check on your list.

## 5.2 Create view

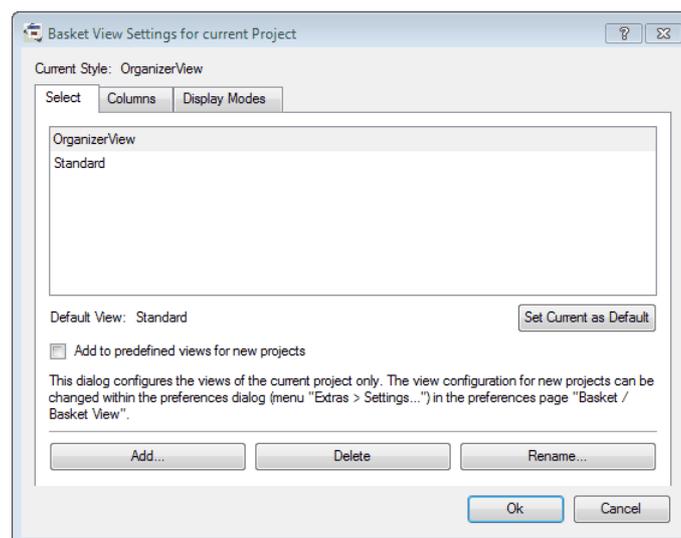
You can create as many article list views as you need and switch between them. For example, you can create a view without prices if you have the need to work together with a customer organizing an offer.

To create a new view select *View* → *Configure Basket Views...*

### 5.2.1 Select

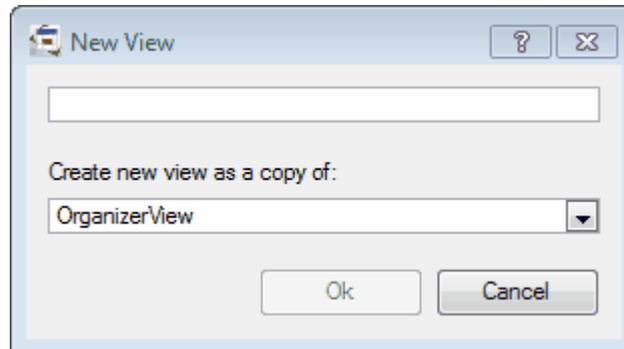
In the *Select* tab the existing views are listed - you can add, delete or rename them. The standard view cannot be deleted or renamed.

By clicking on the *Set Current as Default* button you'll set the currently selected view as the standard, i.e., this view will automatically appear next time the project is open. If you select the option *Include in Default Styles*, then the current view will be stored in pCon.basket view database and it will be available for all future projects. If not active it will be available only for the project the view was created on.



Select tab of the view setting window

To create a new view click on the *Add...* button. Enter the view's name and select which current view you want to base your new view upon. Select the view which has more common elements with the one you would like to create.

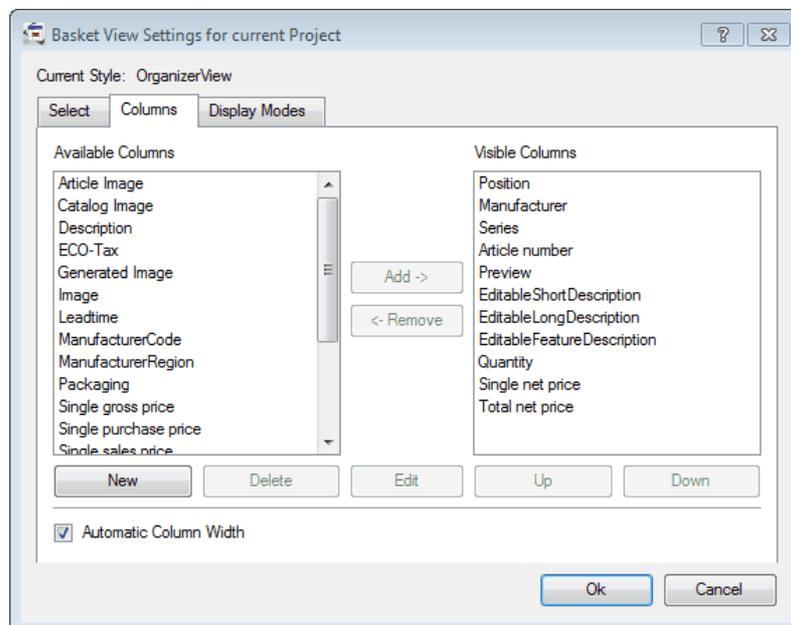


*New view creation*

## 5.2.2 Columns

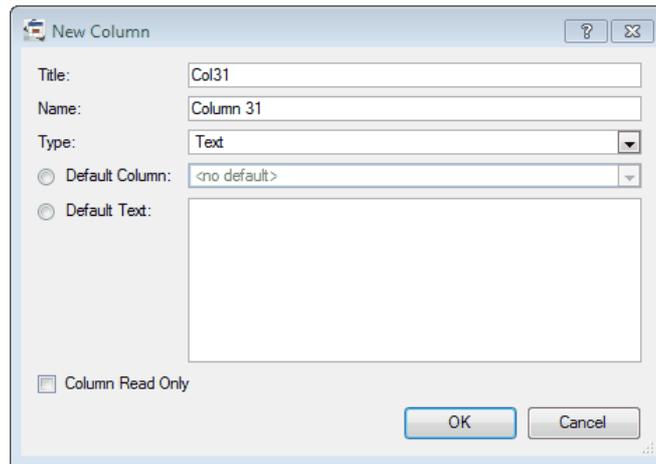
In the *Columns* tab you'll define which columns you want to display in the workspace.

To add a column to the *Visible columns* list select a column on the *Available columns* list and click on the *Add ->* button. To eliminate a column, select a column on the *Visible columns* list and click on the *<- Remove* button. You can also order the columns by selecting the column you want to move and clicking on the *Up* or *Down* button.



*Column tab of the view setting window*

You also have the option to create new column to your view. Click on the *New* button and a new window will appear where you can define the new column properties.



*New column creation window*

You can define the following properties:

- *Title*, the column title will be displayed on the top of the column in the workspace
- *Name*, the name displayed in the selection list of available columns
- *Type*, there are several available column types
  - *Boolean*, provides the option to activate annotations/commentary about the logical value of a statement
  - *EClass Id*, with this type the E-class Standard is imposed, by which articles are uniquely identified
  - *Image*, allows to load an image
  - *Number*, allows to specify a numerical value
  - *Text*, allows to write descriptive text
- *Default column*, allows you to specify if the column is based on one of the default columns
- *Default text*, allows you to specify the default text for the selected column. Via placeholders you can also access several characteristics of an article. The following placeholders are available:

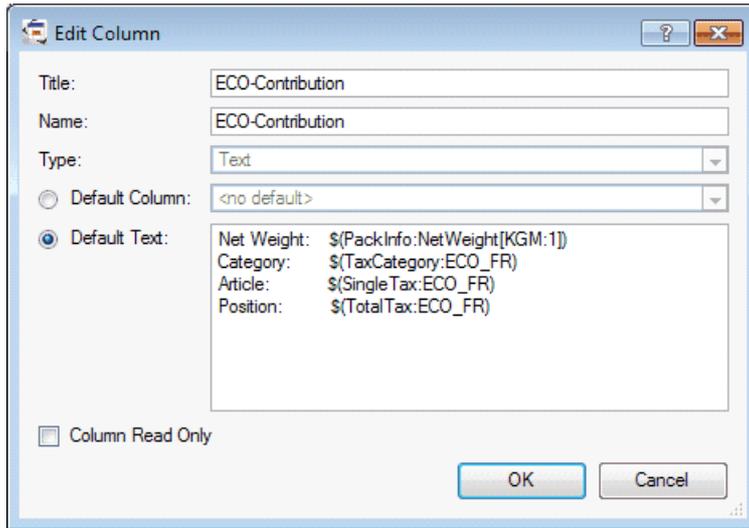
Placeholder	Description
<b>\$(SingleTax:&lt;tax-type&gt;)</b>	Calculated single tax price of an article  <tax-type> represents a valid tax type in the selected tax scheme. Currently the following are available <ul style="list-style-type: none"> <li>▪ VAT</li> <li>▪ ECO_FR</li> </ul>

Placeholder	Description
	<p><b>Example:</b></p> <p>\$(SingleTax:ECO_FR)</p>
\$(TotalTax:<tax-type>)	<p>Calculated total tax price of an article</p> <p>&lt;tax-type&gt; represents a valid tax type in the selected tax scheme. Currently the following are available</p> <ul style="list-style-type: none"> <li>▪ VAT</li> <li>▪ ECO_FR</li> </ul> <p><b>Example:</b></p> <p>\$(TotalTax:ECO_FR)</p>
\$(TaxRate:<tax-type>)	<p>Tax rate valid for this article</p> <p>&lt;tax-type&gt; represents a valid tax type in the selected tax scheme. Currently the following are available</p> <ul style="list-style-type: none"> <li>▪ VAT</li> <li>▪ ECO_FR</li> </ul> <p><b>Example:</b></p> <p>\$(TaxRate:ECO_FR)</p>
\$(TaxCategory:<tax-type>)	<p>Tax category valid for this article</p> <p>&lt;tax-type&gt; represents a valid tax type in the selected tax scheme. Currently the following are available</p> <ul style="list-style-type: none"> <li>▪ VAT</li> <li>▪ ECO_FR</li> </ul> <p><b>Example:</b></p> <p>\$(TaxCategory:ECO_FR)</p>
\$(PackInfo:<pack-info-type><opt-unit-and-precision>)	<p>With this placeholder you can access the packaging information of the article</p> <p>Via &lt;pack-info-type&gt; you can access a specific element of the packaging information. In detail these are:</p> <ul style="list-style-type: none"> <li>▪ Width</li> <li>▪ Height</li> <li>▪ Depth</li> </ul>

Placeholder	Description
	<ul style="list-style-type: none"> <li>▪ Volume</li> <li>▪ TaraWeight (Weight of the pack unit)</li> <li>▪ NetWeight (Weight of the article)</li> <li>▪ ItemsPerPackUnit</li> <li>▪ PackUnitsPerArticle</li> </ul> <p>&lt;opt-unit-and-precision&gt; is optional, so it can also be left empty. Otherwise you can control the unit &lt;unit&gt; and the precision &lt;precision&gt; of the displayed value.</p> <p>If the field is empty the default unit will be either MTR (meter), MTQ (cubic meters) or GRM (gram) and full precision is used.</p> <p>The following &lt;unit&gt; entries are available:</p> <ul style="list-style-type: none"> <li>▪ Length:               <ul style="list-style-type: none"> <li>▪ MMT (millimeter)</li> <li>▪ CMT (centimeter)</li> <li>▪ DMT (decimeter)</li> <li>▪ MTR (meter)</li> <li>▪ INH (inch)</li> <li>▪ FOT (foot)</li> </ul> </li> <li>▪ Volume:               <ul style="list-style-type: none"> <li>▪ MTQ (cubic meter)</li> <li>▪ INQ (cubic inch)</li> <li>▪ LTR (liter)</li> </ul> </li> <li>▪ Weight:               <ul style="list-style-type: none"> <li>▪ MGM (milligram)</li> <li>▪ GRM (gram)</li> <li>▪ KGM (kilogram)</li> <li>▪ LBR (pound)</li> </ul> </li> </ul> <p>&lt;precision&gt; has to be an integer and defines the desired number of decimal places. The maximum number of decimal places is 16.</p> <p><b>Example:</b></p>

Placeholder	Description
	\$(PackInfo:NetWeight[KGM:1])
\$(PriceDate)	Show the price date set for the article

A user-defined column which shows all important information for the ECO-Contribution could be defined like the following:



*User-defined column for showing the ECO-Contribution*

The result would look like the following in the Article List:

Position	Hersteller	Serie	Artikelnummer	Beschreibung	ECO-Contribution	Menge	EP	GP
1	XY	CH	Chair1	Visitorchair Position net price	Net Weight: 68,2 KGM Category: Seat (plastics) Article: 6,55 EUR Position: 6,55 EUR	1,00	250,00	250,00
2	XY	CH	Chair1	Swivelchair Position net price	Net Weight: 98,3 KGM Category: Seat (metal) Article: 9,44 EUR Position: 18,88 EUR	2,00	399,00	798,00

Document Gross Price: 1.048,00 EUR; Value of Goods: 1.048,00 EUR; ECO-Contribution: 25,43 EUR, VAT: 210,39 EUR; Final Amount: 1.283,82 EUR; Margin: 0,00 EUR (0,00 %)

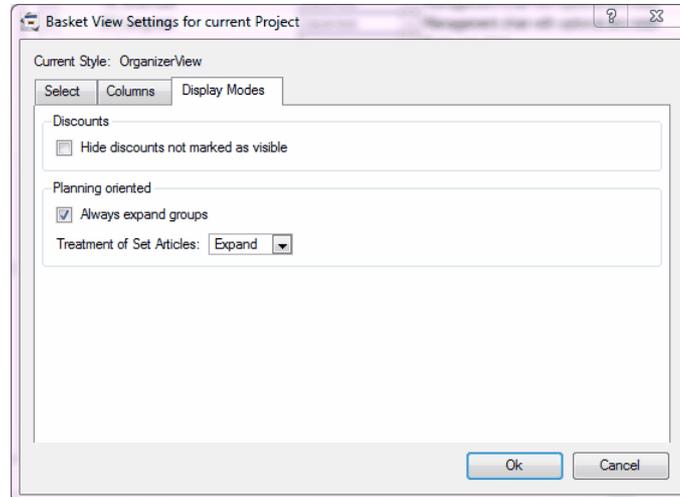
Article List | Configuration | Article Calculation | Header Calculation | Texts/User-defined Articles | Catalog Information

*User-defined column ECO-Contribution in the Article List*

**NOTE:** Please note, that the tax and packaging information can only be shown if they are maintained in the OFML data by the manufacturer.

### 5.2.3 Display modes

In the *Display* modes tab, you can define two further view options:



*Display mode tab of the view setting window*

- *Hide discounts not marked as visible*, activating this option will hide all non marked discounts from the article list view. You can mark discount/upcharges in the Calculation tab. In the following image 'Discount 1' is marked as not visible while 'Discount 2' is marked as visible.

Discounts and additional charges		
<input type="checkbox"/>	-	Discount 1
<input checked="" type="checkbox"/>	-	Discount 2

Description
Straight work: top 60 cm. deep cm.90x60 vg
Straight work: top 60 cm. deep cm.90x60
(vertical grain)
cm. W 90 x D 60 x H 2.5
Surface's colour: pear
Fixed code: 15016410BD
Discount 2 (5.00 %)
Position net price

*Calculation tab, discounts section*

*Article list view*

- *Always expand groups*, if active all groups will be always expanded.
- *Treatment of Set Article*, says how Set Article should be displayed:
  - *Expand*, the sub-positions of the Set Article will be visible.
  - *Collapse*, the sub-positions of the Set Article are not visible.
  - *Dynamic*, in the article tree you can decide for every Set Article how it should be displayed - collapsed or expanded.

For further information on Set Articles see section [Set Article](#)

### 5.3 Change view

To apply a view to a project go to *View* → *Change current basket view...* and select the desired view. If you change a project's view, close the project and reopen pCon.basket will present the project's defined default view.

### 5.4 Change Default view

There are two types of default workspace views that you can set up. One is the project default view and the other is the application default view.

#### Project Default View

If you want your project to have the same permanent default view, independent if you close and reopen it in the same or in a different computer, go to *View* → *Configure Basket Views...*

In the new window select the view you want to be the default, click on the *Set current as default* button and select *Ok*. From this moment on this will be the project's default view. For example, if you change to another view, save the project, close and reopen it, the defined default view will be applied.

#### Application Default View

If you want to define a default view valid for all new projects, go to *Extras* → *Settings* → *Basket View*. In the new window select the view you want to be the default, click on the *Set current as default* button and select *Ok*. From this moment on this default view will be applied for new projects. Make sure that when you create the view as described in section [Create View](#), you select the option *Include in Default styles*.

If you want to add this view also to existing projects (e.g. you get a pCon.xcad project from a colleague) select the box in the column *Add to existing projects*.

### 5.5 Delete view

Go to *View* → *Configure Basket Views...*, select the view you want to delete and press the delete button. Be aware that you cannot delete a view that is defined as the default view. You'll have to define another view as default and only then you'll be able to delete the view. From this moment on the deleted view will not be available for new projects.

### 5.6 Description types

You can choose which type of description to view in the articles list Description column. Select the command *View* → *Position*.

Choose between the following entries:

- *Standard description*, displays the default description text
- *Short description*, displays the short description text

- *Long description*, displays the long description text
- *Article features*, displays the article's properties which can be configured. This is a dynamic field since it is automatically updated when the user changes the products properties
- *Additional text*, displays the additional text entered under the Text/User Articles tab in the workspace area
- *Price Components*, displays the composition of the articles list price

Several of these descriptions can be viewed at the same time (for example, *Long Description* and *Article Feature*). There's not a standard on the information included in each one of these fields, the information is depend on the decisions of each manufacturer.

## 5.7 Image manipulation

In pCon.basket you can manipulate the default image or you can completely replace it by an imagine of your choice.

### 5.7.1 Manipulate current image

**NOTE:** The following can only be done if you have a pCon.basket licence type B.

Manipulation of an image is not a frequent task, but you may want to change it to highlight for example a product feature that in the standard view is not visible.

To manipulate the current image select the desired article and go to the *Configuration* tab. There you can rotate the article and specify some of the image's properties in the *View* and *Camera* tabs. See section [View](#) and [Camera](#) for further details.

When you have the image you were looking for, select the command *View* → *Generate New Image* or *CTRL +G*. If you go to the article list you'll see that pCon.basket has replaced the standard image with the new one you just created. This image is going to be used by the print manager when you create the printed or electronic offer.



Standard image



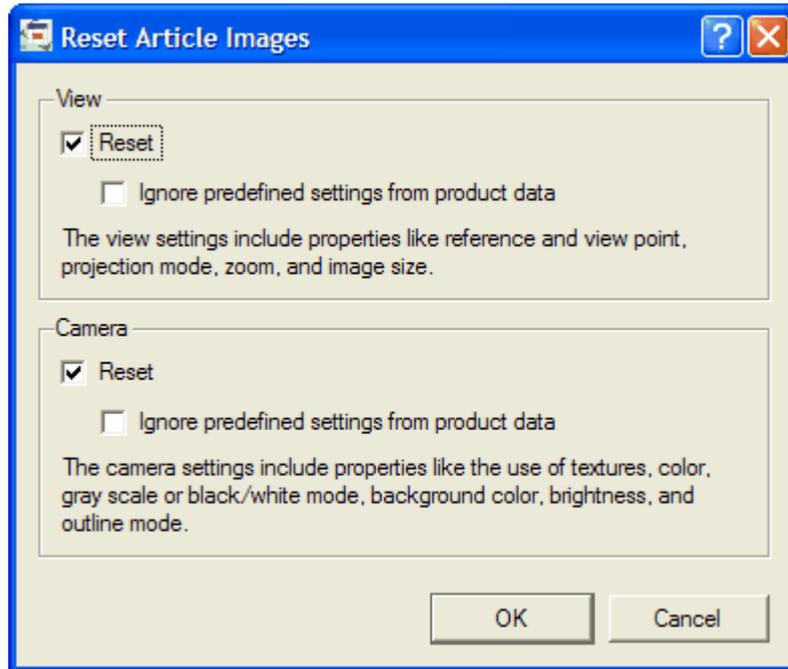
Modified image

Position	Manufacturer	Series	PreviewImage	Article number	Description
1	CI	AV		AVPA	Conference or waiting area amchair Conference or waiting-area amchair on castors or glides cm. W 61 x D 57 x H 79.2 Surface's colour: 82/0075 Wheel's kind/sliding: Castors Fixed code: I117136RH75 Position net price

Article list with new image

You can easily set back the standard view through the command *View* → *Default Camera Settings*. If move the object and wish to return to the new defined position select *View* → *Camera like Article Image*.

If you wish to reset the image in the article list, select the article and go to *View* → *Reset Article Images....* A window comes up, where you can define what settings of your image shall be reset. E.g. you like the view of the image but you don't want it to be shown in grey scale, therefore you deactivate the *View Reset*. Then only the colors of the image will be reset and the view will remain the same.



Reset Article Images

When resetting the image the default settings of pCon.basket will be used. See section [Graphic setup](#) and [Basket](#).

You can also use this function for several articles at once. Simply select all article for which you want to update the images and call this function from the menu.

### 5.7.2 Add external image

If you create a user article it's important to be able to have the choice to associate an image to that article. Images can also be inserted for folders and Set Articles, this is especially important if you decide not to show the sub-elements in the printed proposal to simplify the final customer offer. See section [Group Settings](#) for further information on how to hide a group's elements.

Ensure you have the column *Preview Image* in your *Article List* view. You can find it in the standard *OrganizerView*. If you have build a new view see section [Columns](#) for further information on how to add a column.

Right click on the empty *Preview Image* cell of the desired article or group. A context menu will show up, select the command *Replace Image*. A new window will show up where you identify the location of the desired image file. The typical sources of images are the following:

- Photo provided from the manufacturer. This is the common situation if you are placing an image for article for wish the manufacturer has no pCon data.
- Render created in pCon.planner. This is the common situation if you want to collapse a group so that the client is not exposed to unnecessary product details. In this case you can easily make a high quality render in pCon.planner save it as a jpg and load into pCon.basket.

Position	Manufacturer	Series	PreviewImage	Article number	Description
1					Reception

*Group in the article list with new image*

You can manipulate the image size and alignment settings for the printed offer. This enables you to easily give your offers different look and feel solutions. See section [Article/Group Print Settings](#) for further information on how to define these settings.

Pos	Description	Amount	Unit price	Total
1	<b>Reception</b> This solution includes lower blue panels and maple tops. It's included an executive black chair. The sides are 2.4m by 2.4m with 1m height.			EUR6,147.00

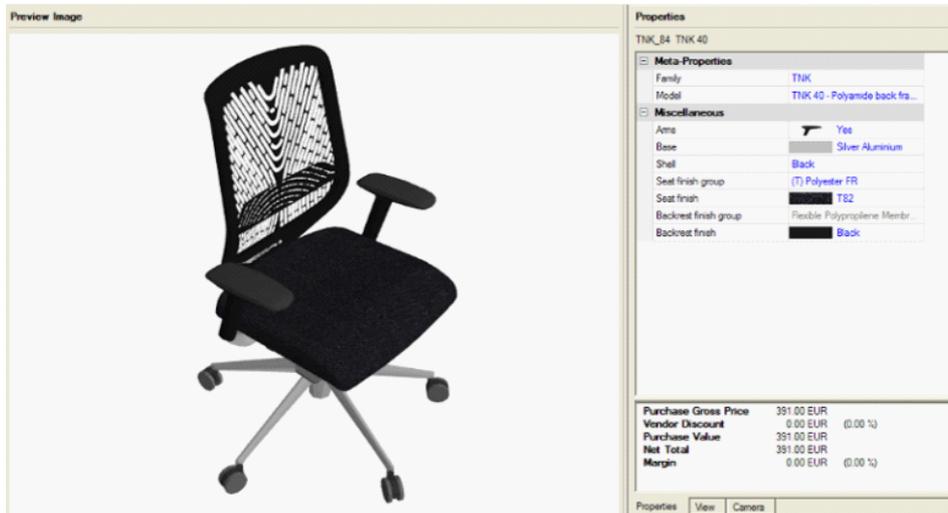


*Printed offer with image width set to 10cm and center alignment*

If you wish to reset the image in the article list, right click on the image and context menu will show up. Select the command *Reset Image* and pCon.basket will replace the image inserted by you with the standard one.

## 6 ARTICLE CONFIGURATION

After inserting an article you can configure it using OFML's advanced configuration rules.



*Article configuration section with the Properties window active*

You can configure an article by selecting the *Configuration* tab in the workspace section. The article list is replaced by a new interface which is divided in two sections: the preview image and the article properties. On the lower part of the Properties area there are three tabs:

- *Properties* (default); where you can change an articles properties in a quick and simple way
- *View*; where you can change the graphical properties of the preview image, like changing to an orthographic view
- *Camera*; where you can change properties of the preview image, like the environment light or the width of the outline edges

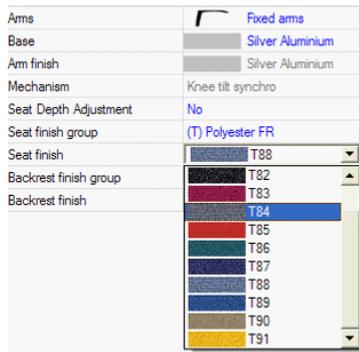
The preview is a 3D image that can be printed, rotated and viewed from several viewpoints by pressing down on the left mouse button and moving it.

**NOTE:** The availability of the view and camera setting functionality depends on whether you have pCon.basket license type B.

### 6.1 Properties

Each article entered in a catalog can have various properties. There are two ways to change the properties: if it is a numeric value, you can enter it directly; otherwise, open a drop down menu with the list of options. All article property edits are immediately shown in the image preview.

There are two ways to edit properties like finishes or colors:



*Drop down list*



*Preview*

### Drop down list

If you click on the text of the property, you will activate a drop down menu with a list of possible alternatives.

### Preview

If you click on the image representing a property option, you'll activate a view mode where all possible options for that property are visible in a series of columns and rows. By selecting one, you'll return to the initial property view.

## 6.2 View

By selecting the View, the following screen appears:

**View**

---

Reference Point X:  Y:  Z:   
 Use Center of Local Bounds

---

View Point X:  Y:  Z:   
 Polar Coordinates Alpha:   
 Beta:   
 Radius:

---

Projection Mode  Perspective Projection  
 Orthographic Projection

Zoom

---

Image Size    
 Crop Image

---

Complete Image for Composites

---

View tab

Various changes can be made to the image preview:

- *Reference point*; using this option, the user picks the rotation center for the 3D object. To change values, deactivate the field *Use center of local limits*; otherwise, the reference point will remain the center of the object. When the field is not locked, a new value can be entered.
- *View point*; using this option, you can rotate the 3D object and view the selected angle. The user can change the preview by left clicking and moving it over the view or typing new values in these fields.
- *Zoom*; using this option, the user can select the size of the 3D object in the preview. The user can also choose to see it in perspective or orthographic projection. By pressing the right mouse button and moving the mouse over the preview image you can also zoom in or out of the image.



*Perspective View*



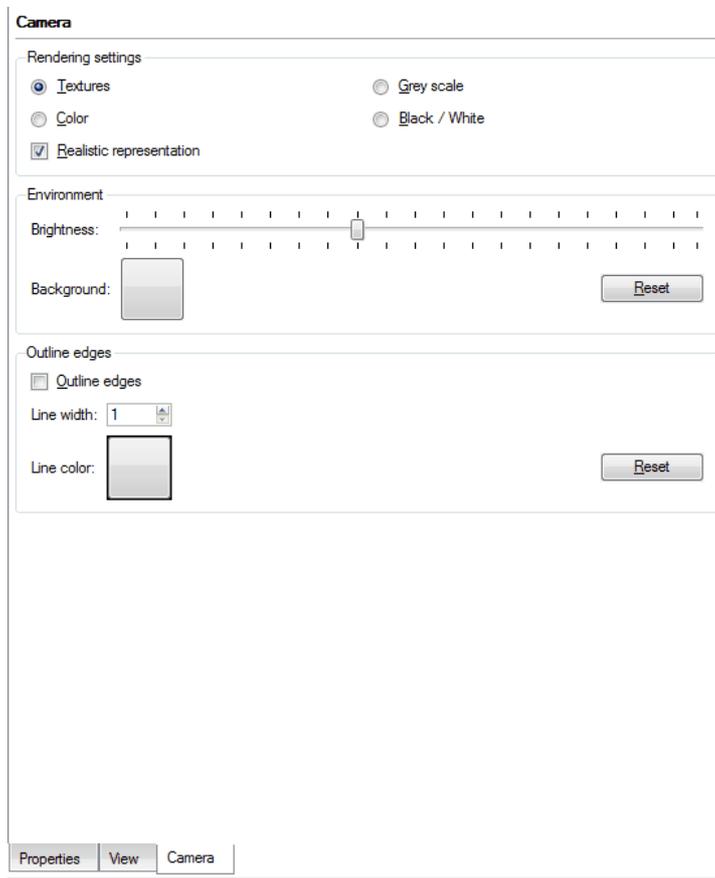
*Orthographic View*

- *Image Size*; using this option, the user can decide the image preview size.
- *Complete Image for Composites*; using this option the image in the article list will show the article and its sub-articles after generating a new image (see also [Manipulate current image](#)). For example it is possible to show a worktop with its accessories, which have been added by meta properties. Without this option only the worktop will be shown.

**NOTE:** The View tab is only available with pCon.basket licence type B.

## 6.3 Camera

By selecting the *Camera* tab, the following window will appear. This command allows you to set up the type of view for the desired articles.



Camera tab

In the first section, *Rendering settings*, you can choose from:

- *Textures*; view the article with the materials chosen by its properties
- *Color*; view the article in different colors based on its components
- *Gray Scale*; view the article in various grays, based on its components
- *Black/White*; view the article in black and white
- *Realistic representation*: The Realistic render mode is the one in which textures and colors appear at the highest level of quality. This mode makes high demands on the graphics hardware.

In the second section, *Environment*, you can decide:

- *Brightness*; moving the cursor makes the image more or less bright

- *Background*; you can choose the color of the image's background
- *Reset*; you can reset the initial brightness and background.

In the third section, *Outline edges*, you can decide to make visible the lines outlining an article; you can choose their thickness and color. By selecting the *Reset* button, you can reset to the standard configuration. For some articles, showing the outline edges improves the perception of the details.



*Standard image*



*Image with outlined edges*

**NOTE:** The Camera tab is only available with pCon.basket licence type B.

## 6.4 Global Variant configuration

While creating an offer it's common to have several offer revisions before the final release. These revisions are normally based on a customer's feedback and frequently include changes on an article's finishes. If your offer contains few article this is a relative task to manage, but it becomes challenging if it contains dozens or hundreds of articles.

The correct procedure to mass configure variant changes is as follows:

- Select similar articles with the techniques described in section [Selection](#)
- Select *Edit* → *Global Variant Configuration*
- The *Configuration* tab will be automatically selected. Notice on the right side the list of the properties of the selected articles. This list is a union of the properties of all selected articles. Update the necessary properties and pCon.basket will update all selected articles.

If you select articles with different properties the union of the properties will be visible. If you change a property that's not common to all articles, only the articles with that property will be updated.

## 6.5 Profile Manager

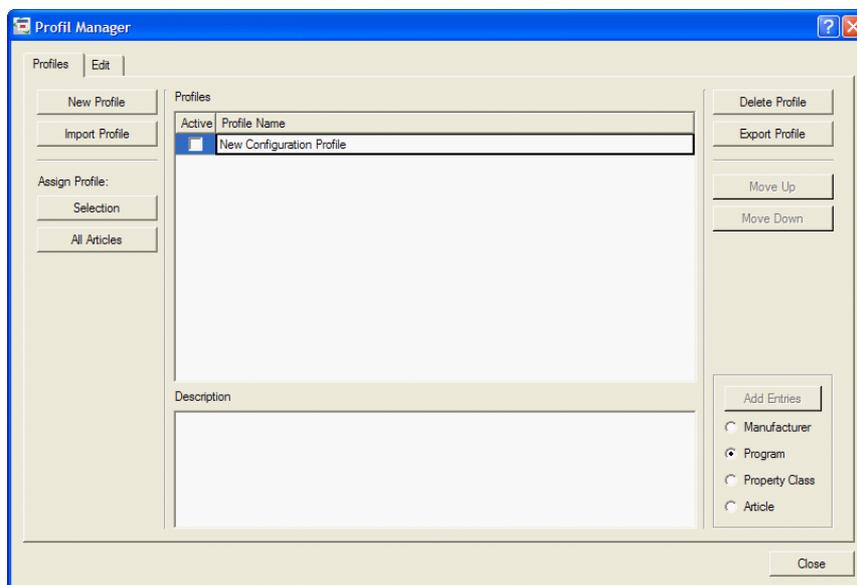
Another possibility to change the configuration of several articles at once is the *Profile Manager*. In a profile you can save the configuration of different properties. If an article is inserted or if you assign a profile to an article all properties of this article which exist in the profile will get the same value as in the profile. For example you can create profiles for different customers if they always order the same configuration. The profiles can be exported and therefore shared with other colleagues.

The *Profile Manager* can be found under *Extras* → *Profile Manager ...*. In the first tab *Profiles* all existing profiles are listed in the middle. You can create, delete, import and export a profile here. Also you can assign a profile to the articles, control the sequence of the profiles and add entries to the profiles. On the second tab *Edit* you see the properties assigned to the profile selected in the tab *Profiles*.

**NOTE:** The Profile Manager is only available with pCon.basket licence type B.

### 6.5.1 Create a profile

With the button *New Profile* a new profile is created. It is shown in the table in the middle of the dialogue. By clicking in the field *Profile Name* you can edit the name of the profile. The column *Active* shows whether the profile is assigned to an article during insertion of the article.



*Profile Manager window*

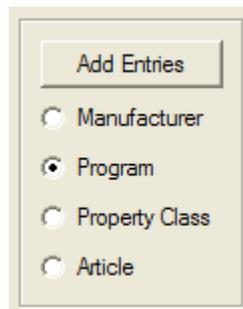
To add a properties configuration to this profile, insert an article and configure it. Then select the properties you want to add to the profile by clicking in the first column of the property editor. A green check mark will be shown at this position.

Width	0,800 m	Width	0,800 m
Height	2,000 m	Height	2,000 m
Depth	0,400 m	Depth	0,400 m
Cupboard Socle	 Surrounding	Cupboard Socle	 Surrounding
Handle	 Curved metal	Handle	 Curved metal
Corpus	 Beech	✓ Corpus	 Beech
Front	 Beech	✓ Front	 Beech
Boards	 Glass	Boards	 Glass
Base	 Steel blue	✓ Base	 Steel blue
Handle	 Steel blue	Handle	 Steel blue

Article Configuration

Checked properties

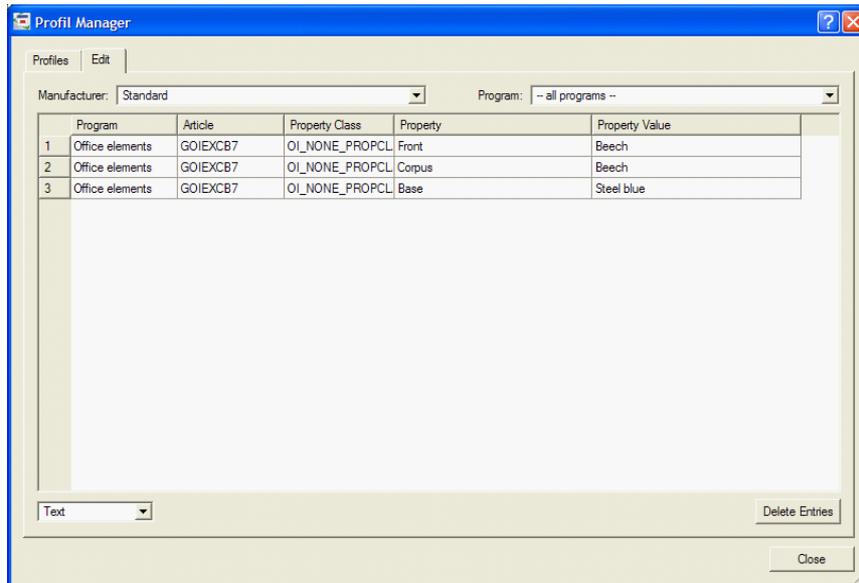
In the *Profile Manager* select the profile to which you want to assign the configuration. At the bottom right of the Profile Manager window the button *Add Entries* is enabled. Select on which level you want to add the configuration:



- **Manufacturer:** The configuration will be assigned to every article of the manufacturer the properties come from.
- **Program:** The configuration will be assigned to every article of the product line the properties come from.
- **Property Class:** The configuration will be assigned to every article which has the same property class.
- **Article:** The configuration will always be assigned to the article, where the properties come from.

If you now switch to the tab *Edit* you will see those properties. All properties are sorted by manufacturer, so if you want to see the properties of a different manufacturer you have to select this manufacturer in the drop-down list at the top left of this window. With the drop-down list *Program* you can filter the shown properties configuration by product line.

With the button *Delete Entries* the selected configuration is deleted. With the drop-down list at the bottom left you can select whether to show only the Symbols, only the Text or Symbol and Text in the table.

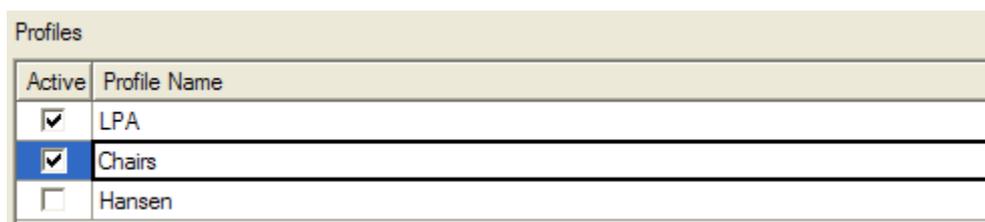


*Tab Edit of Profile Manager*

### 6.5.2 Assign a profile

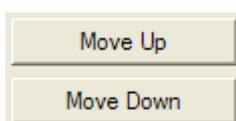
A profile can be either assigned when an article is inserted or after the insertion if the user assigns explicitly.

All profiles which are marked as *Active* in the profiles list will be assigned to the inserted articles. If there are several profiles active and there is a conflict because they have for example the same property with a different configuration, the order of the profiles decides about their priority, whereas the top profile has the highest priority.



*The first two profiles are active and will be used when inserting an article. "LPA" has the highest priority.*

To change the order of the profiles use the buttons 'Move Up' and 'Move Down' at the right side of the dialogue.



For the post-configuration of articles the two buttons under *Assign Profile* have to be used. Activate the profiles you want to use in the column *Active* of the profile list. Then you can assign this profile only to the selected articles by pressing the button *Selection* or you can assign it to all articles by pressing the button *All Articles*.

### 6.5.3 Exchange of profiles

It is possible to exchange profiles between different workstations. A created profile can be exported. For this select the profile in the profiles list and press the button *Export*. A file dialogue comes up and asks you for file name and the directory where to save the profile. All profiles are saved as cpx-files.

A saved profile can be imported by pressing the button *Import*. Select the profile file (file extension .cpx). In the profile list the imported profile will be shown.

## 7 OFFER STRUCTURE

pCon.basket offers can be structured through folders, each representing a group which can contain articles or further subgroups. Group creation is very useful since it allows articles to be organized in a more logical way.

If you import a project from pCon.planner or pCon.xcad where you had previously created groups, they will be visible in pCon.basket. See section [Import](#) for further information on importing articles from the other pCon modules.

If you are working in a project started in planner/AutoCAD and the project contains many single articles, it's recommended to create the groups in those applications. It's much simpler to accomplish it in CAD applications because you can visually select the articles.

### 7.1 Numbering

Each tree structure position is assigned an individual position number. Position numbers are assigned progressively. In each level of the structure, the first position is number 1. The following position is number 2. Secondary positions have a corresponding number that refers to the upper level. For example, if position 1 has a secondary position, this will be number 1.1. The second secondary position will be numbered 1.2. Position numbers are automatically assigned by pCon.basket.

Position
1
1.1
1.2
1.3
2
2.1

*Position numbering*

### 7.2 Position Types

There are seven types of positions in pCon.basket:

 **Folders (F3)**; folders are structure elements which can contain other folders or articles. Folders allow the user to join individual positions into groups. To add a folder, select the desired folder position and use the command *Edit* → *New folder*, you can also use the key *F3*. To change the folder name, left click on the highlighted folder and enter a new name, you can also use *F2*. pCon.basket doesn't allow folders to be placed under articles.

 **Articles**; are added through catalog selection, import or article search. Articles can contain other articles or text positions as sub elements. There are three different types of articles:

-  **Standard Article**; they have standard OFML properties.

-  *Metatype Article*; they have advanced properties, so called Meta-Properties. See section [Split up Composite Article](#) for further information.
-  *Planning Article*; they are inserted from a pCon.planner project (.fml-file) and have to be converted to standard pCon.basket articles (see section [pCon.planner](#))

 *User-defined article (F4)*; these articles can be created directly in pCon.basket by the user through the command *Edit* → *New user-defined article*, you can also use *F4*.

 *Text position (F5)*; with pCon.basket, the user can create text-only positions in the tree structure. This can be useful to better describe articles or a proposal section. You can create them through the command *Edit* → *Create New text position*, you can also use *F5*. Text positions share the same rules of the articles. You cannot associate prices to text positions.

 *Set Article*; those articles are similar to folders, but they can get further information like quantity, manufacturer, product line etc. The price of the Set Article is calculated according to the prices of its sub positions. A Set Article can't contain another Set Article. To create a Set Article make a right mouse button click on a folder and go to *Set Article* → *Create Set Article*. See also section [Set Article](#) for more information.

## 7.3 Groups

An offer can be structured in groups and subgroups for a clear organization. For example, an offer could have a group called 'Administrative Office' under which there could be several subgroups, for example 'Accounting Office' and 'Meeting Room'.

The creation of groups allows you to:

- Quickly identify specific articles
- Present an organized offer to the customer
- Display partial totals
- Present different discounts for different groups
- Simplify a multi article product to the end customer. There are products which are represented by multiple articles. You can insert all these articles inside a group and show only the group header in the printed offer. Normally the end user isn't interested to know how much a beam or a bracket costs.

If you imported a project from pCon.planner or pCon.xcad where you had created groups, pCon.basket will recognize those groups. This is the usual process for a project which involves a drawing.

There are two different types of groups:

- [Folders](#)
- [Set Article](#)

### 7.3.1 Folders

*Folders* are structure elements which can contain other folders or articles. Folders allow the user to join individual positions into groups.

To create a folder select the command *Edit* → *New folder* or the shortcut *F3*. If you have a folder selected and insert an article in the article list, that article will be automatically inserted under that folder. To change the folder name, left click on the highlighted folder and enter a new name, you can also use *F2*. pCon.basket doesn't allow folders to be placed under articles.

### 7.3.2 Set Article

With Set Articles several articles can be summed to one article item. The user can enter information of manufacturer, product line, article name, quantity and texts to this item. The price of the Set Article will be calculated automatically according to the contained articles (incl. quantity and discounts) and the quantity of the Set Article itself.

The user can decide whether to display a Set Article collapsed or expanded in the basket view. According to this setting the offer will be printed.

#### Create Set Article

To create a Set Article at first a folder has to be created. Make a right mouse button click on the folder in the article tree. In the context menu go to *Set Article* → *Create Set Article*. In the sheet *Texts/User-defined Articles* you can now add all the information of the Set Article.

#### Break up a Set Article

To destroy a Set Article make a right mouse button click on the Set Article in the article tree. The context menu comes up. Go to *Set Article* → *Break up Set Article*. The Set Article is a folder again. Please note that the quantity of the grouped articles has not changed. If you make a Set Article out of this folder again the earlier quantity of the Set Article will be shown again.

#### Add further positions to a Set Article

Select the Set Article and add an article from the catalog. This article will be added to the Set Article automatically. The price of the Set Article is updated.

To add a user-defined article make a right mouse button click on the Set Article and select *New user-defined article*. Or select the Set Article and press *F4*. You can also add folders or text positions in that way.

If you just move an article in the article tree under the Set Article it will not automatically be added to the Set Article. For doing this make a right mouse button click on the article you want to add and go to *Set Article* → *Add to Set Article*.

#### Remove a position from a Set Article

Select the position you want to remove and delete it. The Set Article is automatically updated.

Simply moving the position in the article tree is not sufficient to remove the position from the Set Article. For this select the position you want to remove and make a right mouse button click on it. Go to *Set Article* → *Remove from Set Article*.

### Basket Views

A Set Article can be shown expanded or collapsed in the basket. This can be configured in the basket views. Go to *View* → *Configure Basket Views...* In the tab *Display Modes* the *Treatment of Set Article* can be set.

- *Expand*: All Set Articles will be shown expanded in this view.
- *Collapse*: All Set Articles will be shown collapsed in this view.
- *Dynamic*: For every single Set Article it can be chosen whether to show collapsed or expanded. For this select in the article tree the Set Article and make a right mouse button click on it. Under Set Article there are now two further options *Collapse Set Article* and *Expand Set Article*.

For further information on article list views see also section [Article List](#).

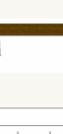
## 7.4 Selection

In the tree structure selected positions are highlighted with a blue background, in the article list with a grey background.

Description	Positio	Manufacturer	Series	Article number	PreviewImage	Description	SP	TP
1. 1st Floor	1					1st Floor		
1. Meeting Room	2					Meeting Room		
1.1. Conference- and Side table	1.1.1	EG	GX	GOIEXTA4		Conference- and Side table Position net price	1,858.20 1,858.20	1,858.20 1,858.20
1.1.2. Management chair with optional arm rests	1.1.2	EG	GX	GOIEXSC2		Management chair with optional arm rests Position net price	1,064.00 1,064.00	6,384.00 6,384.00
1.1.3. Lower cupboard with flap door	1.1.3	EG	GX	GOIEXCB5		Lower cupboard with flap door Position net price	126.80 126.80	126.80 126.80
1.1.4. Upper cupboard with drawers	1.1.4	EG	GX	GOIEXCB1		Upper cupboard with drawers Position net price	904.50 904.50	904.50 904.50
2. Manager Office	7					Manager Office		
2.1. Corner work place, 90°	2.1	EG	GX	GOIEXTA6		Corner work place, 90° Position net price	1,663.60 1,663.60	1,663.60 1,663.60
2.2. Management chair with optional arm rests	2.2	EG	GX	GOIEXSC2		Management chair with optional arm rests Position net price	1,216.00 1,216.00	1,216.00 1,216.00

Selected 'Meeting Room' group

Furthermore child articles of a selected main position will be shown in light blue / light grey, so you can see which articles have a connection to a main position. This is helpful for Set Articles and Metatype articles. If you select the main position of those articles you can see where in the article list the corresponding child articles can be found.

Description	Position	Manufacturer	Series	Article number	Preview Image	Short Description	Long Description	Feature Description	Quantity	SP	TP
1. Office 1	1								1,00	3.446,40	3.446,40
1. EG/ GX/ GOIEXCB7/ Wing-door cupboard	1.1	EG	GX	GOIEXCB7		Wing-door cupboard	Wing-door cupboard	Width: 800 mm Height: 2000 mm Depth: 400 mm Cupboard Soole: Surrou Handle: Curved metal Corpus: Alerce	1,00	1.015,90	
2. Office 2											
1. EG/ GX/ GOIEXCH2/ Providing chair	2					Providing chair	Providing chair	Seat upholstery: Grey Back upholstery: Grey Frame: White aluminium	10,00	233,00	2.330,00
3. EG/ GX/ GOIEXSC2/ Management chair with ...	3	EG	GX	GOIEXSC2		Management chair wit	Management chair wit	Back rest: High Armrest: Foamrest Landscape pads: With Delta: Ergonomic	1,00	1.216,00	
2. EG/ GX/ GOIEXCO3/ Container with draw...	1.2	EG	GX	GOIEXCO3		Container with drawer	Container with drawer	Width: 450 mm Height: 720 mm Depth: 800 mm Extension length: 0 mm Organisation: 3/3/6 Handle: Curved metal Corpus: Alerce Front: Alerce Plate: Alerce Handle: White aluminium	1,00	320,30	
3. EG/ GX/ GOIEXTA1/ Table, config., slide...	1.3	EG	GX	GOIEXTA1		Table, config., slideab	Table, config., slideab	Plate type: Normal shape Frame: White four-legg Width: 1600 mm Depth: 800 mm Height adjustment: Free Tabletop: Alerce Frame/Rack: Anthrazt Foot: White aluminium Linking: None	1,00	894,20	
Page break	5										
Article Image Position	2.1	EG	GX	GOIEXCH2		Providing chair	Providing chair				
Article Image Width											
Article Image Alignment											

*Selected Set Article; the Set Article children are shown in light blue, one child has been moved outside the Set Article*

You can select a position in various ways:

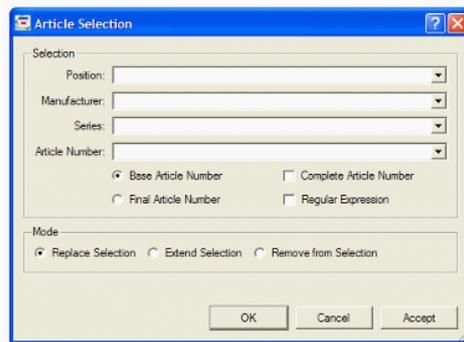
- By left clicking - the position is selected.
- By left clicking and then moving the mouse while holding down the left mouse button - all included positions will be selected.
- By left clicking, keeping the *SHIFT* key pressed and selecting the last position - all the positions between the two are selected.
- By left-clicking, keeping the *CTRL* key pressed and selecting other positions - all positions, even if they are not continuous, will be selected.
- To select the entire tree structure, use the key combination *CTRL+A*. This is a very useful command if you want to apply a certain property to all the articles in the offer.

You also have the possibility to select articles by manufacturer, product line or article number. For this see section [Filtering positions](#).

## 7.5 Filtering positions

Often during an offer creation there is the need to select articles with common characteristics. For example, imagine that a customer has decided in the last minute to change the color of all chairs of a specific model from black to red. This would be a complex task if you had hundreds of chair entries in non sequential places your offer.

In pCon.basket you can select articles using a powerful filter command under *Edit* → *Select group...* A dialog box will show up where you must define the search options. pCon.basket will automatically select all articles which meet the defined search criteria.

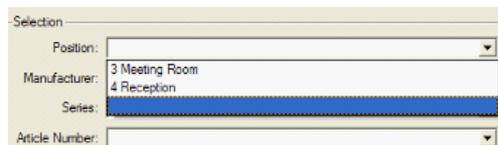


*Article selection window*

You can define the search criteria in the upper part of the dialog box, called *Selection*. In the lower part, you can determine the current selection methods in the tree structure.

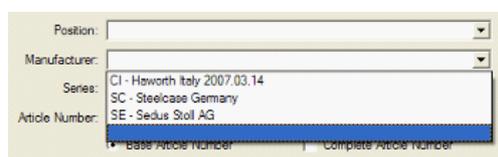
### Position

You can use this criteria to select articles by position number. When you select a position number, all articles that belong to this number or that are found under it are selected. If you open the selection list, all the folders appear and can be selected. For each folder, pCon.basket first shows the position number and then the group name.



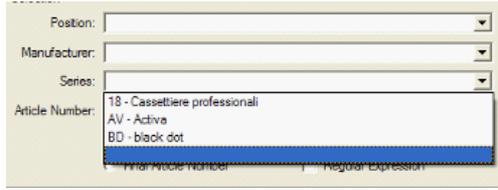
### Manufacturer

Using this field, you can select all the articles in the tree structure that are associated with a particular manufacturer. The selection can be done manually or from the selection list. A supplier identification code is requested for manual entry and the user must know this code. When the code is entered, the complete name of the supplier will appear automatically. All the suppliers with at least one article in the structure are on the list. If a position was previously selected, for example, a folder, and you now select a manufacturer, the articles that fulfill both conditions will be selected.



### Series

This field can be used to search through articles that belong to a particular product series. Series are defined by an identification code. If it is entered manually, the complete series name will appear. If you use the selection list, you will see all the valid series. If a user has already selected a supplier, then only the series that belongs to that supplier and its articles will be shown on the list.



## Article Number

You have the option of searching articles by its code. You can search by the full code or by part of the code by using standard windows wildcards. You'll have to be familiar with the codification of the products; you can see the article codes in the article list view.

You can define four ways for pCon.basket to interpret the article number you inserted:

- *Basic article number*; all article in the tree structure whose code starts with the entered part of the code will be selected.
- *Complete article number*; if this is activated in addition to the previous option, you must enter the exact code of the desired article.
- *Final article number*; all articles in the tree structure that end with the entered code will be selected. The article end numbers can, for example, define the variants of an article.
- *Regular Expression*; the typed text will be interpreted as normal text and all the corresponding articles will be found.

**NOTE:** pCon.basket is case sensitive.

After defining the selection criteria you can have a quick preview of which article(s) will be selected by clicking on the *Accept* button. You have different methods which enables you to merge the result of different selections.

- *Replace selection*; it will replace the previous selection with the new one. The current selection is canceled and the new selection is visible in the tree structure.
- *Extend selection*; the new selection is added to the previously selected articles.
- *Remove from selection*; the current search results will be removed from the tree structure. This method is useful if for example you want to select all articles except the ones from a particular manufacturer. You can select all articles through *CTRL+A*, do a selection with the manufacturer that you want to remove and select *remove from selection*.

## 7.6 Moving positions

You are able to (re)organize articles and folders in the tree structure. You can move article inside folders, move them out of folders, move them up or down in the tree structure. To select articles and folders, use the selection techniques described in section [Selection](#). You can move more than one article at the same time.

### 7.6.1 Up and down

A position can be moved up or down within the tree structure.

To move a position down:

- Use the shortcut key *CTRL+D*
- Click on the Move Down button 
- From the *Edit → Down* menu

To move a position up:

- Use the quick key *CTRL+U*
- Click on the Move Up button 
- From the *Edit → Up* menu

### 7.6.2 Indenting

A position can be indented to the right or the left of the tree structure. This allows you to change the level of an article or a group. In fact, if an article is reentered to the right, it reenters into the group right above it; if it reenters to the left, it is at the same level as the group above it.

To move an article within a group on to an upper level, the article must be located at the end of the list of articles.

Increase reentry:

- Use the shortcut key *CTRL+ I*
  - Click on Increase Indent 
  - From the *Edit → Increase Indent* menu

Reduce entry:

- Use the shortcut key *CTRL+ Shift + I*
  - Click on Decrease Indent 
  - From the *Edit → Decrease Indent* menu

## 7.7 Cut, copy, paste and delete positions

Windows' cut, copy, paste and delete techniques can also be used in pCon.basket. It is possible to apply them to both articles and groups.

When you copy a group, pCon.basket will ask you if you also want to copy its sub-elements. The behavior is similar for the cut and delete commands.

The commands can be found in the menu under *Edit*.

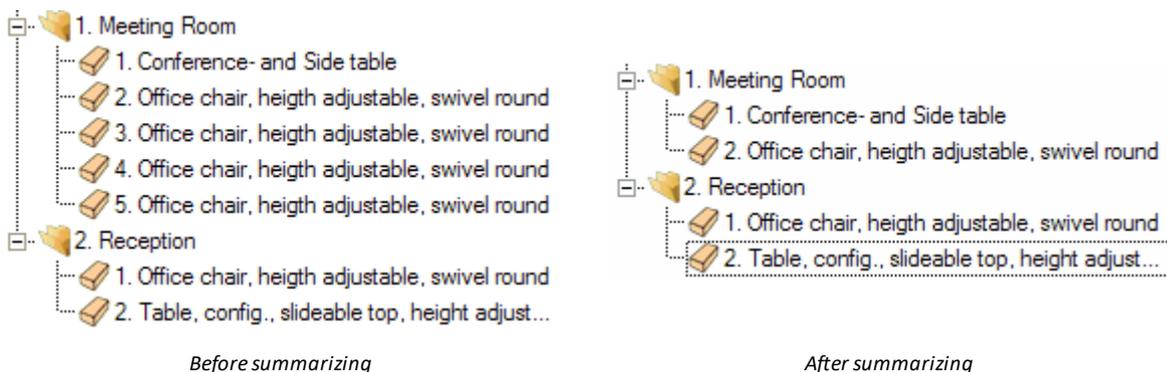
	Cut	Ctrl+X
	Copy	Ctrl+C
	Paste	Ctrl+V
	Delete	Del

## 7.8 Summarizing articles

If you import an article list from pCon.planner or pCon.xcad (see section [Import](#) for further information) you may find situations where each article is represented by an individual line, even in case of repeated articles. Instead of an article being represented by a line with quantity '3', it's represented by three lines each of quantity '1'.

pCon.basket can automatically summarize these quantities. To perform this command first select the articles which you want to summarize, in most cases it will be all of the articles (*CTRL + A*), and then run the command *Extras* → *Summarize Basket Articles*.

pCon.basket will group all repeated articles on each level on one single line with quantity n, and with the corresponded total price. The reason for summarizing products only inside the same groups resides on the fact that groups are normally independent entities, for example you may need to delete a group while maintaining the others.



Notice in the above example that the article 'Office chair' has been grouped only inside the 'Meeting Room' folder, maintaining the other copy in the 'Reception' folder.

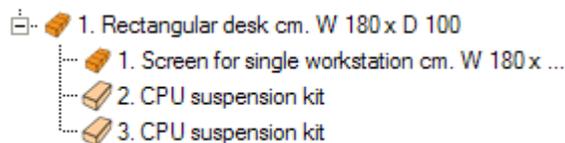
**NOTE:** The summarizing does not work inside a Metatype for child articles. The connection between parent article and child article has to be dispersed before. See section [Split up Composite Article](#) for further information.

## 7.9 Split up Composite Article

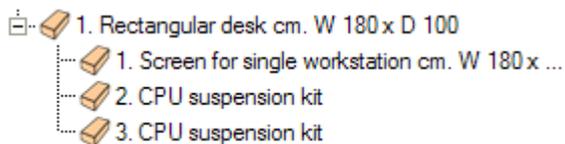
With Metatypes the configuration on inter-product level is possible. For example for a given article not only the intra-product properties, like colors, can be changed (here, the basic article number remains unchanged) but even those properties changing the basic article number, such as the selection of another program or collection is possible. Furthermore Metatypes can contain concatenation and attachment rules, e.g. attachment of accessories by properties. If an accessory is inserted by such a Metatype property it has a fixed connection to its father article. For example a desk screen has a fixed connection to a desk.

This connection is sometimes very disturbing when creating an offer structure, because those articles can't be summarized. Therefore it is useful to delete the connection and only have the single articles.

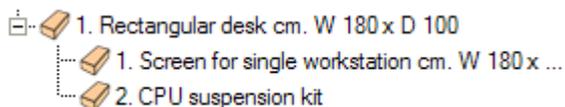
Select the Metatype father object and go to *Edit* → *Split up Composite Article*. You will see the icon of the articles changes from Metatype to Standard Article (see section [Position Types](#)). The connection between the articles has been completely removed, therefore you can now summarize the articles.



*Before splitting the Metatype Article*



*After splitting the Metatype Article*



*Summarized articles, which have been Metatype children before*

**NOTE:** Be careful when using this function, since there is no way to undo it. Also not only the connection between the articles are deleted but the whole Metatypes properties are removed.

## 8 CALCULATION

pCon.basket's price calculation functions are very powerful and specifically developed to give you full flexibility to decide the best way to achieve your offer's economic value. You can arrive to the final offer price through the normal discount/up charge methods or through reverse calculation.

Contrary to Microsoft® Excel you can easily add new rows without having to worry about updating cell formulas and formatting.

### 8.1 Article Calculation

The article calculation window allows you to manipulate all aspects related with the commercial value of your offer. The values displayed in the calculation window are dependent of the current articles selected in the article list. The calculation window can be activated using the *Article Calculation* tab.

Article Calculation						
	Description	Percent	Base	Absolute	Count	Total
	Price Date			21.04.2016		
<b>Base data</b>						
	Purchase Gross Price			476,43 EUR		476,43 EUR
	Vendor Discount	0,00 %	incr.	0,00 EUR		0,00 EUR
	Purchase Value			476,43 EUR		476,43 EUR
	Sales Price			476,43 EUR	1,00 x	476,43 EUR
<b>Discounts and additional charges</b>						
<input checked="" type="checkbox"/>	<input type="checkbox"/> Discount 1	0,00 %	incr.	0,00 EUR		0,00 EUR
<input checked="" type="checkbox"/>	<input type="checkbox"/> Discount 2	0,00 %	incr.	0,00 EUR		0,00 EUR
	Position Net Price			476,43 EUR		476,43 EUR
<b>Header discounts and additional charges</b>						
	Sonderrabatt	5,00 %	incr.	23,822 EUR		23,822 EUR
	Rabatt 2	0,00 %	incr.	0,00 EUR		0,00 EUR
	Transport	2,00 %	PNP	9,529 EUR		9,529 EUR
	Aufschlag 2	0,00 %	PNP	0,00 EUR		0,00 EUR
<b>Totals</b>						
	Net Total			462,137 EUR		462,137 EUR
	Value Added Tax	0,00 %		0,00 EUR		0,00 EUR
	Gross Total			462,137 EUR		462,137 EUR
	Margin	-3,093 %		-14,293 EUR		-14,293 EUR

Article List   Configuration   **Article Calculation**   Header Calculation   Texts/User-defined Articles   Catalog Information

*Article Calculation area*

The article calculation window is made up of different columns and rows. The rows are organized in four sections: base data, discount/up charges, header discounts/up charges and totals. In the first row additionally the articles [price date](#) is shown.

### 8.1.1 Select article(s)

The first step in the article calculation process is to select the article(s) for which you want to apply the calculations. For example, you may want to apply a special discount only to a specific product series because the manufacturer has a special campaign going on, or you may want to apply certain economic conditions only to a certain folder.

These are the most common scenarios

- **Select one article;** under *Article Calculation* the price of the selected article will appear and you can apply discounts and up charges to this article only. You can also set the desired amount of that article.
- **Select several articles;** using *SHIFT*, *CTRL* or the command *Edit → Select Group...*, you can select several articles even non consecutive ones. Under *Article Calculation* the total for the selected articles will appear and you can apply discounts and up charges for these articles. See section [Selection](#) for details.
- **Select a group;** if you right click a group in the tree structure, a menu with the entry *Calculate Group* will appear, select it. The *Article Calculation* section of the workspace will appear. Here you can apply discounts and rebates for these articles. If the words *'the number and/or order of the discounts differ'* appear in red, it means that at least one of the selected articles in the group has different features. Therefore, you must check each article. That can occur if, for example, the discount description is edited, an article is added to the group or the group calculation was redone.
- **Select the entire offer;** if the area of the tree structure is active and you press *CTRL+A*, all the articles in the offer will be selected. In the *Article Calculation* tab the total for the offer will appear and you can apply discounts or up charges for these articles.

### 8.1.2 Columns

The calculation window has six columns, they are:

- *Description*; describes a row's values.
- *Percent*; the absolute value in terms of percentage.
- *Base*; the base from which the percentage value is calculated (e.g. the Sales Price or incremental)
- *Absolute*; the absolute value in the selected currency. If more than one article is selected and if the articles have different values, '?.??' will be displayed.
- *Count*; quantity for the selected article(s). If more than one article is selected and if they have different quantities, '?.??' will be displayed.
- *Total*; total values for the selected article(s).

All values colored in blue can be changed by the user; pCon.basket will automatically recalculate all other values affected by that change.

### 8.1.3 Base data

This section is the starting point for the whole calculation, since it allows you to set up your sales base prices and your dealership discounts. You'll find the following fields:

- *Purchase gross price*; it's the vendor list price before your dealership negotiated discount.
- *Vendor discount*; specifies the discount your dealership gets from the manufacturer. You can enter it manually or define it one time for all series and it will show up automatically (see section [Vendor Discounts](#)). The first discount is always calculated on the purchase gross price. For the second and further discounts you can select whether it should be also calculated on the purchase gross price or incremental (Purchase gross price - vendor discounts).
- *Purchase value*; difference between the gross purchase price and the vendor discount. It's the price you pay for the products you resell. On the base of this pCon.basket calculates the dealership's margin.
- *Sales Price*; the original sales price

**NOTE:** If you selected a non-discountable article you can not edit the vendor discount and purchase value.

If you place the mouse over the *Base Data* row and right click, a menu will appear where you can:

- *Add Vendor Discount*; adds a new vendor discount
- *Reset Vendor Discount*; deletes all vendor discounts

If you place the mouse over the *Vendor Discount* row and right click, a menu will appear where you can:

- Add Vendor Discount; adds a new discount
- Delete Vendor Discount; deletes the selected discount
- Move Vendor Discount up; moves the discount one position up
- Move Vendor Discount down; moves the discount one position down
- *rel. to Gross Purchase Price*; set the base for the percentage calculation to gross purchase price
- *Incremental*; set the base for the percentage calculation to incremental

Base data		
	Purchase Gross Price	
	Vendor Discount	5.00 %
	Special Vendor Discount	0.00 %
	Purchase Value	
	Sales Price	
Discounts and additional charges		
<input checked="" type="checkbox"/>	- Special Discount	
<input checked="" type="checkbox"/>	+ Transport	

- Add Vendor Discount
- Delete Vendor Discount
- Move Vendor Discount Up
- Move Vendor Discount Down
- rel. to Gross Purchase Price
- Incremental

### 8.1.4 Discounts and up charges

This section allows you to configure the discounts and up charges for a selected group of articles. They can be entered as a percentage or as an absolute value.

Discounts and additional charges						
<input checked="" type="checkbox"/>	<span style="color: green;">-</span> Special Discount	5.00 %	incr.	27.50 EUR		110.00 EUR
<input checked="" type="checkbox"/>	<span style="color: red;">+</span> Transport	4.00 %	SP	22.00 EUR		88.00 EUR

The blue Discount 1 and Discount 2 fields can be renamed by selecting them with the mouse. Next to these fields, there is the symbol '?' which, if selected after entering a discount value in the *Percentage* or *Absolute* columns, becomes '-' or '+'. The discounts are marked with a green minus while the up charges are marked with a red plus.

If you place the mouse over the *Discounts and Up Charge* row and right click, a menu will appear where you can:

- *Add Discount*; adds a new discount
- *Delete Discount*; deletes the selected discount
- *Move Discount Up*; moves the discount one position up
- *Move Discount Down*; moves the discount one position down
- *rel. to Sales Price*; set the base for the percentage calculation to Sales Price
- *Incremental*; set the base for the percentage calculation to incremental

Discounts and additional charges						
<input checked="" type="checkbox"/>	<span style="color: green;">-</span> Special Discount	5.00 %	incr.			
<input checked="" type="checkbox"/>	<span style="color: red;">+</span> Transport	4.00 %	SP			
	Position Net Price					
Header discounts and additional charges						
	Special Discount	5.00 %	incr.			
	Discount 2	0.00 %	incr.			
	Logistic	2.00 %	PNP			

Add Discount  
 Delete Discount  
 Move Discount Up  
 Move Discount Down  
 rel. to Sales Price  
 Incremental

Next to each discount, there's the option of entering a check mark; if the check mark is removed, the discount will not appear in the article list but the affected articles will still include the non visible discount.

**NOTE:** See *Extras* → *Settings* → *Basket* → *Basket View* → *Display Modes* → *Hide discounts not marked as visible*.

### 8.1.5 Header Discounts and additional charges

This section shows the effect of the discounts and upcharges for the whole project. They are only shown for information purpose. They can't be changed here.

Please also refer to section [Header Calculation](#) for more information on how to change the project related discounts and upcharges.

### 8.1.6 Totals

The Totals section of the *Article Calculation* tab allows you to view and set up the following values:

- *Net Total*; is the original sales price plus or minus eventual (header) discounts and (header) up charges. This field can be edited, if you enter a value, pCon will automatically calculate the correct discount or up charge. This is useful if you want to create offers with a defined rounded total. Instead you could also use the rounding settings in the [project properties](#) (see also [A side note to rounding](#)).
- *ECO-Contribution*; this field is only visible if you have a license for the [additional module taxation schemes](#) and selected the country *France* with the variant *with ECO-Contribution* in the *Project Settings*. If the required information (weight and ECO-Contribution tax category) are available in the OFML data pCon.basket calculates the ECO-Contribution according to the office furniture scheme defined by Valdelia.
- *VAT*; the default VAT selected during installation will be shown here. You can change it for each project. To do so go to *Edit* → *Project Settings* → *Calculation* → *VAT*. If you have a license for the [additional module taxation schemes](#) you can also work with several VAT values in your project (e.g. standard rate and reduced rate).
- *Gross Total*; is the net total plus taxes. This field can be edited, if you enter a value, pCon will automatically calculate the correct discount or up charge.
- *Margin*; the profit margin of the selected articles. The margin is viewed as a percentage or an absolute value. To calculate correctly this field you'll have to fill out the vendor discount (see section [Vendor discounts](#)). The margin value can be manually inserted, in this case pCon will automatically calculate the necessary discounts or up charges.

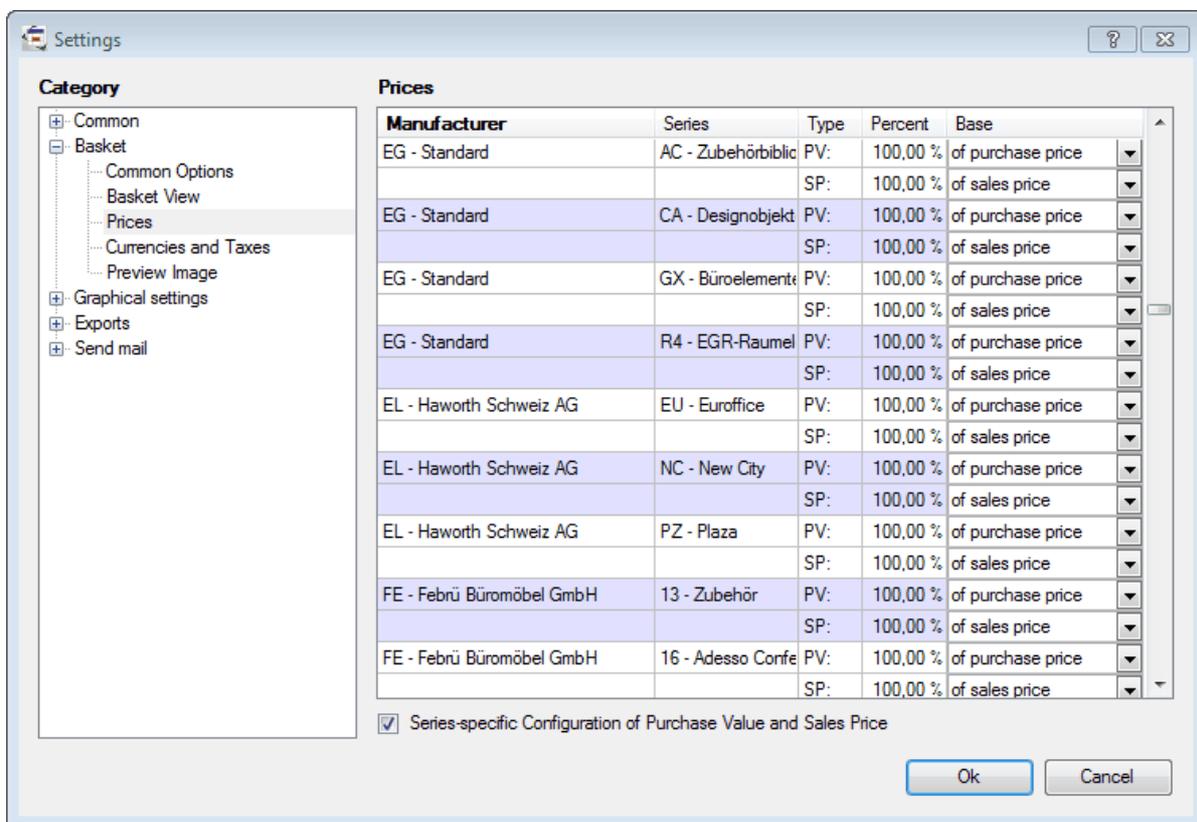
**NOTE:** When you select more than one article, you may see '??' in certain cells in the *Absolute* column. This happens when you select articles which don't share common values. When you select individual articles you'll never see the question marks.

**NOTE:** If you work with the country scheme France and the variant with ECO-Contribution but the OFML article does not have the required information to calculate the tax (weight and ECO-Contribution tax category), no ECO-Contribution and VAT will be calculated for this article. The Gross Total fields will show '??'. Additionally the article will be marked as inconsistent (red font) and in the tab *Configuration* under the properties window a corresponding message will be shown. For adding the required tax information to this article [convert it to a user-defined article](#).

### 8.1.7 Vendor discounts

pCon.basket enables you to easily manage an offer's margin. You can automatically have margins inserted in your offers by defining a vendor discount for all the series of the manufacturers you represent. This is normally a onetime effort with a periodical review. The vendor discounts play a very important role in determining an offer's margin calculation.

You can set up a standard discount in *Extras* → *Settings* → *Basket* → *Prices*. In the new window you'll see all the available series organized by manufacturer. For each series you can define its default *Purchase Price (PP)* and *Sales Price (SP)*. If you want to define the prices on manufacturer level instead of series level please deselect the option *Series-specific Configuration of Purchase Value and Sales Price*.



Price setting window

**NOTE:** The *PP* and *SP* changes will be applied only for article inserted after updating the settings. If you want to change already inserted articles, select them and manually edit the Vendor discount field in the *Article Calculation* tab.

### 8.1.7.1 Purchase price

The purchase price defines the discount the manufacturer gives the distributor for a particular product line. The purchase price is represented as a percentage of the original purchase price or sales prices.

Imagine that for a product line you specify your PP as 50% of sales price. Insert a new article of the specified product line go to the *Article Calculation* tab you'll see that the *Vendor Discount* is automatically set up at 50%.

	Description	Percent	Base	Absolute	Count	Total
<b>Base data</b>						
	Purchase Gross Price			200.00 EUR		200.00 EUR
	Vendor Discount	50.00 %	incr.	100.00 EUR		100.00 EUR
	Purchase Value			100.00 EUR		100.00 EUR
	Sales Price			200.00 EUR	1.00 x	200.00 EUR
<b>Discounts and additional charges</b>						
<input checked="" type="checkbox"/>	Discount 1	10.00 %	incr.	20.00 EUR		20.00 EUR
<input checked="" type="checkbox"/>	Discount 2	0.00 %	incr.	0.00 EUR		0.00 EUR
	Position Net Price			180.00 EUR		180.00 EUR
<b>Header discounts and additional charges</b>						
	Special Discount	0.00 %	incr.	0.00 EUR		0.00 EUR
	Discount 2	0.00 %	incr.	0.00 EUR		0.00 EUR
	Logistic	0.00 %	PNP	0.00 EUR		0.00 EUR
	Extra Charge 2	0.00 %	PNP	0.00 EUR		0.00 EUR
<b>Totals</b>						
	Net Total			180.00 EUR		180.00 EUR
	VAT	19.00 %		34.20 EUR		34.20 EUR
	Gross Total			214.20 EUR		214.20 EUR
	Margin	44.444 %		80.00 EUR		80.00 EUR

Calculation example

Let's look at the example of the above article. Notice that the margin is €80 which is the difference between the *Net Total* and the *Purchase Value* (€180-€100). If you don't define a vendor discount you'll always have negative margins.

### 8.1.7.2 Ad hoc vendor discounts

Imagine you managed to negotiate an extra discount for some specific articles, maybe due to the size of the order or due to the fact that it contains a product series in promotion. You can specify extra discounts by placing the mouse over the *Base data* row and right clicking it. The following menu appears:

- *Add vendor discount*; allows you to add a new discount line in this section.
- *Reset vendor discount*; deletes the discount line entered with *Add Vendor Discount*.

Description	Percent	Base	Absolute	Count	Total
Purchase Gross Price			200.00 EUR		200.00 EUR
Vendor Discount	20.00 %	incr.	40.00 EUR		40.00 EUR
Purchase Value			160.00 EUR		160.00 EUR
Sales Price			200.00 EUR	1.00 x	200.00 EUR

Original discount (20%)

Description	Percent	Base	Absolute	Count	Total
Purchase Gross Price			200.00 EUR		200.00 EUR
Vendor Discount	20.00 %	incr.	40.00 EUR		40.00 EUR
Promotion	5.00 %	incr.	8.00 EUR		8.00 EUR
Purchase Value			152.00 EUR		152.00 EUR
Sales Price			200.00 EUR	1.00 x	200.00 EUR

Added extra vendor discount (+5%)

## 8.2 Alternative positions

Alternative position allows you to mark a position as alternative to the main proposal. For example, imagine that in a previous sales discussion the customer was undecided between two chair models, you can present both in the offer, marking one as alternative.

	Positio	Manufacturer	Series	Article number	PreviewImage	Description	Quantity	SP	TP
✓ 1	1	EG	GX	GOIEXSC2		Management chair with optional arm rests Back rest: High amrest: T-amrest Lordose pads: With Rolls: For melamin Seat upholstery: Black Back upholstery: Black Foot: Chrome Amrest: Beech undamped Lordose pads: Black Position net price	1.00	1,216.00	1,216.00
✓ 2	2	EG	GX	GOIEXSC1		Office chair, height adjustable, swivel round Seat upholstery: Black Back upholstery: Black Foot: Chrome Position net price	1.00	550.00	550.00
Document Gross Price: 1,216.00 EUR; Value of Goods: 1,216.00 EUR; VAT (19.00 %): 231.04 EUR; Final Amount: 1,447.04 EUR; Margin: 0.00 EUR (0.00 %)									

Article list with an alternative position (#2)

To mark a position as alternative, follow these steps:

- Select the position
- Select *Edit* → *Convert to Alternative Position*, or right click and use the short menu

An alternative position can be visually identified by the writing in italics and presenting the *Total Price* in gray. The value of the alternative position is only indicative; it will not be used to calculate the offer price.

## 8.3 Article list summary

The most important details of the offer can be seen in the last row of the *Article List* tab. The fields marked in blue can be edited at any time.

- *Document Gross Price*; the total offer price is shown.
- *Value of Goods*; the total offer price after header discounts and upcharges have been considered.
- *ECO-Contribution*; this field is only visible if you have a license for the [additional module taxation schemes](#) and selected the country *France* with the variant *with ECO-Contribution* in the *Project Settings*. It shows the sum of all ECO-Contribution values of the articles.
- *VAT*; value defined in the *Edit* → *Project Settings* → *Calculation* → *Taxes*.
- *Final Amount*; price including VAT.
- *Margin*; Margin of the whole project.

Document Gross Price: 2.252.737,20 EUR; Value of Goods: 2.252.737,20 EUR; ECO-Contribution: 5.476,20 EUR; VAT: 442.609,83 EUR; Final Amount: 2.700.823,23 EUR; Margin: 1.229.095,20 EUR (54,560 %)

### Article list summary

To edit a blue shown value just click with the mouse on it. Then you will switch to the *Header Calculation* tab. There you can change the values. Please also see section [Header Calculation](#).

## 8.4 Header Calculation

In the Header Calculation window you can assign discounts and upcharges to a whole project, without editing each and every single article. Also this window gives you an overview of the whole projects values and margin. The header calculation window can be activated using the *Header Calculation* tab.

Header Calculation			
Description	Percent	Base	Absolute
Price Date (Default Value)			21.04.2016
<b>Base data</b>			
Total Purchase Value			1.370,22 EUR
Sales Price Total			1.996,27 EUR
Document Gross Price			1.683,25 EUR
<b>Discounts</b>			
Sonderrabatt	5,00 %	incr.	84,162 EUR
Rabatt 2	0,00 %	incr.	0,00 EUR
<b>Additional Charges</b>			
Transport	2,00 %	DGP	33,665 EUR
Aufschlag 2	0,00 %	DGP	0,00 EUR
<b>Totals</b>			
Value of Goods			1.632,752 EUR
Value Added Tax	0,00 %		0,00 EUR
Final Amount			1.632,752 EUR
Margin	16,079 %		262,532 EUR

Article List
Configuration
Article Calculation
Header Calculation
Texts/User-defined Articles
Catalog Information

Header Calculation Window

The header calculation window is made up of different columns and rows. The rows are organized in four sections: base data, discounts, additional charges and totals. In the first row the projects [price date](#) is show. This date is used for all newly inserted articles to get the price from the installed product data. You can change the date here or you can edit it in the [project settings](#).

#### 8.4.1 Columns

The header calculation window has four columns, they are:

- *Description*; describes a row's values.
- *Percent*; the absolute value in terms of percentage.
- *Base*; the base from which the percentage value is calculated (e.g. the Sales Price or incremental)
- *Absolute*; the absolute value in the selected currency.

All values colored in blue can be changed by the user; pCon.basket will automatically recalculate all other values affected by that change.

#### 8.4.2 Base Data

This section is the starting point for the whole header calculation. It shows the sums of the different single article values:

- *Total Purchase Value*; Show the sum of the purchase values of the single articles. It's the price you pay for the products you resell.
- *Sales Price Total*; Shows the sum of the sales price of the single articles.
- *Document Gross Price*; is the sum of the position net prices. This is the price you are giving to your customer before adding header discounts or up-charges. This field can be edited, if you enter a value, pCon will automatically calculate the correct discount or up charge and assign them to each and every article in the project.

#### 8.4.3 Discounts

This section allows you to configure the discounts for the whole project. They can be entered as a percentage or as an absolute value. The absolute value can be rounded by the system if you made the according project settings (see [Project properties](#) and [A side note to rounding](#)).

The blue Discount 1 and Discount 2 fields can be renamed by selecting them with the mouse.

If you place the mouse over the *Discounts* row and right click, a menu will appear where you can:

- *Add Discount*; adds a new discount
- *Delete Discount*; deletes the selected discount
- *Move Discount Up*; moves the discount one position up
- *Move Discount Down*; moves the discount one position down
- *rel. to Sales Price Total*; set the base for the percentage calculation to Sales Price Total
- *rel. to Document Gross Price*; set the base for the percentage calculation to Document Gross Price

- *Incremental*; set the base for the percentage calculation to incremental

#### 8.4.4 Additional Charges

This section allows you to configure the up charges for the whole project. They can be entered as a percentage or as an absolute value. The absolute value can be rounded by the system if you made the according project settings (see [Project properties](#) and [A side note to rounding](#)).

The blue Extra Charge 1 and Extra Charge 2 fields can be renamed by selecting them with the mouse.

If you place the mouse over the *Extra Charges* row and right click, a menu will appear where you can:

- *Add Additonal Charge*; adds a new discount
- *Delete Additonal Charge*; deletes the selected discount
- *Move Additonal Charge Up*; moves the discount one position up
- *Move Additonal Charge Down*; moves the discount one position down
- *rel. to Sales Price Total*; set the base for the percentage calculation to Sales Price Total
- *rel. to Document Gross Price*; set the base for the percentage calculation to Document Gross Price
- *Incremental*; set the base for the percentage calculation to incremental

#### 8.4.5 Totals

The Totals section of the *Header Calculation* tab allows you to view and set up the following values:

- *Value of Goods*; is the document gross price plus or minus eventual header discounts and header up charges. This field can be edited, if you enter a value, pCon will automatically calculate the correct header discount or up charge. This is useful if you want to create offers with a defined rounded total.
- *ECO-Contribution*; this field is only visible if you have a license for the [additional module taxation schemes](#) and selected the country *France* with the variant *with ECO-Contribution* in the *Project Settings*. It shows the sum of all ECO-Contribution values of the articles.
- *VAT*; the default VAT select during installation will be shown here. You can change it for each project to do so go to *Edit* → *Project Settings* → *Calculation* → *VAT*. If you have a license for the [additional module taxation schemes](#) you can also work with several VAT values in your project (e.g. standard rate and reduced rate).
- *Final Amount*; is the value of goods plus taxes. This field can be edited, if you enter a value, pCon will automatically calculate the correct header discount or up charge. The absolute value will be rounded if you made the according project settings (see [Project properties](#) and [A side note to rounding](#)).
- *Margin*; the profit margin of the whole project. The margin is viewed as a percentage or an absolute value. The margin value can be manually inserted, in this case pCon will automatically calculate the necessary header discounts or up charges.

**NOTE:** If you work with the country scheme *France* and the variant with *ECO-Contribution* but there is at least one article in the project which does not have the required information to calculate the tax (weight and ECO-Contribution tax category), the Final Amount fields will show *???.??*. The corresponding articles are marked as inconsistent (red font) and in the tab *Configuration* under the properties window a corresponding message will be shown. For adding the required tax information to this articles [convert them to user-defined article](#).

## 8.5 Price Date

Products regularly receive new pricing while their options for configuration stay unchanged. In two successive versions of article data, pricing information is often the only differing factor.

To deal with this, it is possible for manufacturer to provide a data version with multiple price lists. This saves you as a user both time and hassle: You create an offer using prices from a particular date and a single manufacturer catalog. Each of these supplied price lists come with a valid date. These price dates define the access day for a respective price. You will use the price date to select a price list.

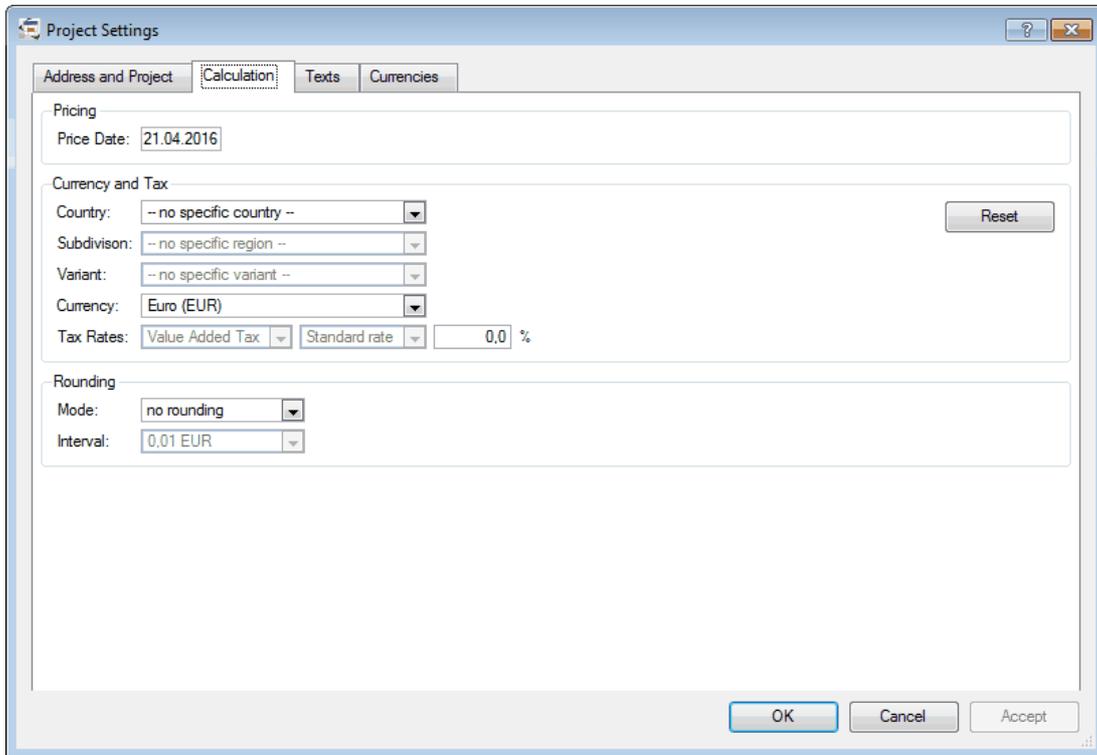
For example: A price list for the current year has a validity date of 1.1.2016. Enter this date in order to work with the list for 2016. In addition, this data includes pricing for the following year. By entering 1.1.2017, you can now work with the data for 2017.

**NOTE:** The specific date for the change of a price list may vary from manufacturer to manufacturer.

The pricing information is stored in the data for each individual article. You can set the pricing data for either the complete project or, if necessary, for the individual configuration.

### 8.5.1 Project Price Date

You can set the price date for a project either in the [Project Settings](#) or the *Header Calculation*. The date indicated here applies to all articles inserted subsequently into the project.



The screenshot shows the 'Project Settings' dialog box with the 'Calculation' tab selected. The 'Pricing' section has 'Price Date' set to '21.04.2016'. The 'Currency and Tax' section includes dropdowns for 'Country' (no specific country), 'Subdivision' (no specific region), and 'Variant' (no specific variant), a 'Currency' dropdown set to 'Euro (EUR)', and 'Tax Rates' set to 'Value Added Tax', 'Standard rate', and '0.0 %'. The 'Rounding' section has 'Mode' set to 'no rounding' and 'Interval' set to '0.01 EUR'. Buttons for 'OK', 'Cancel', and 'Accept' are at the bottom right, and a 'Reset' button is in the 'Currency and Tax' section.

*Project price date in project settings*

If you open a project that does not yet have a price date in the header calculation, pCon.basket will set Today's Date as the default value.

### 8.5.2 Article Price Date

You can view the price date for an article under the *Article Calculation* tab of the article view. Here you can also change the date for an article. If you want to change the price date for several articles, please select them and edit the price date field in the *Article Calculation* tab. If the selected articles have different price dates the field shows *???.???.????* and you can edit it.

**NOTE:** You can only change the price date of an article if the article is up-to-date. If your article is not yet updated the price date will be shown in black letters and is not editable. Please [update](#) the article first.

If you open an old project without a price date assigned the article *Price Date* will initially be shown as *not set*. When [updating](#) with the option *Saved Date*, the selected items will maintain the current date. To give the article an alternative price date, update using *Date* and enter your desired date. These will be determined for the articles and their respective prices from the installed data.

**NOTE:** If a price date for an article is invalid, the article will be marked red in the article tree. In the article view, an *invalid* notation will appear. Under the *Configuration* tab and in the *Article List*, an additional indication of *Invalid Price Date* will be shown.

This problem is solved once you [update](#) the article and select a different price date, in which a price is available. This could be the current date, for example.

## 9 PRINTING OFFER

pCon.basket enables you to easily create a printed or electronic offer with your dealership's look and feel to be send out to your customer.

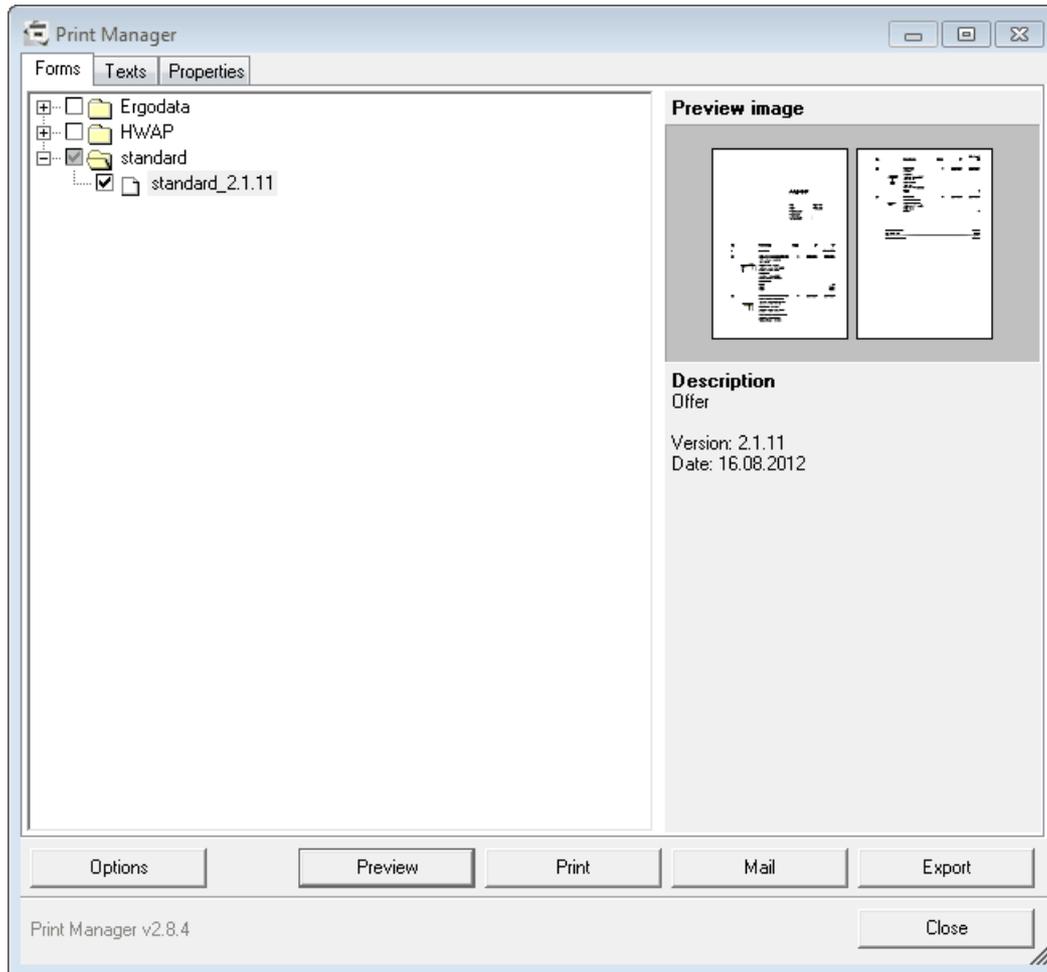
The reports contain a series of functionalities enabling you to adapt them for the particular needs of each proposal. For example in a proposal you may decide not to make the individual prices visible or to show all elements in a group summarized. You can accomplish this flexibility in a very easy and structured way.

Despite the flexibility in adapting the report to your needs the look and feel of the report is constant, allowing all the sales reps proposals to match your dealership's corporate image.

The print manager is the report creation engine of pCon.basket. You can activate it by selecting the command *File* → *Print Manager* or by using the shortcut *CTRL+P*. A new window will open up allowing you to control the report options.

## 9.1 Forms

The first step is to select the form you'll use as a model for the offer's creation. You can select several forms at once by activating the check box in front of the forms name.



*Forms folder*

pCon.basket comes with one default report. Depending on the manufacturers you represent you may have access to specific manufacturer forms. These reports may provide you with a different look and feel and extended functionality. Forms are organized as folders on the left side of the window.

When you select a form the information on the right side is updated. It shows you a preview of the report, the version and the release date. It's important to know where to get this information in case of support needs.

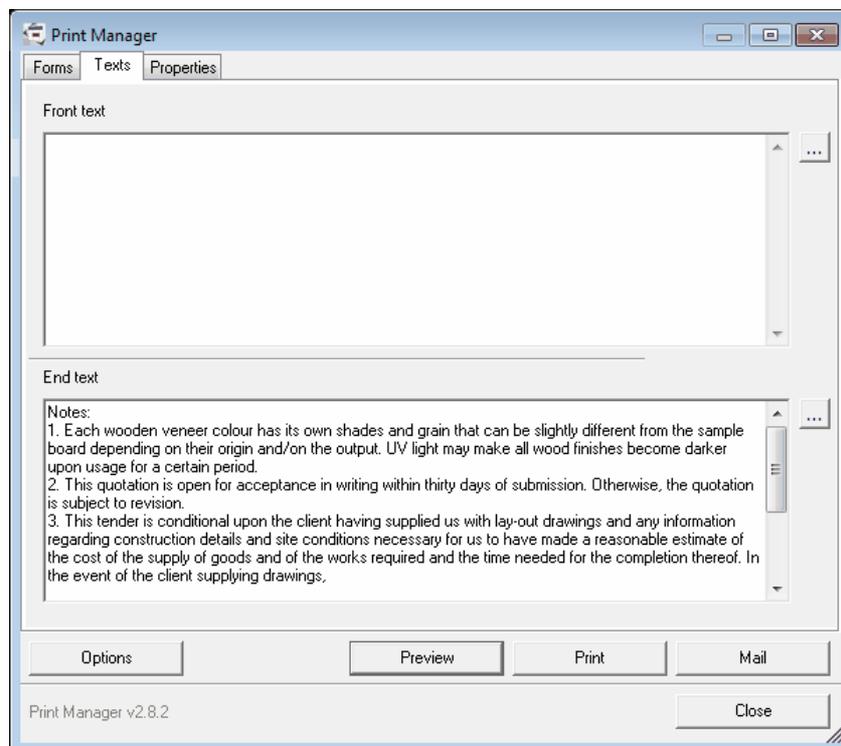
To have a quick view of the selected report with the default options press the *Preview* button. This will open the print preview window, which we cover in more detail in section [Preview](#). To return to the Print manager window simply close the print preview window.

**NOTE:** Please contact your manufacturer to get further information on which reports are available.

If the standard reports or the reports supplied by the manufacturers don't fulfill your needs contact your local EasternGraphics team for further information.

## 9.2 Texts

In this section you can enter the initial and end text for your proposals.



*Texts window*

You can write the text directly on the available spaces or you can load the text from a .txt file. To load a text press the '...' button on the right side and identify the text file you would like to load.

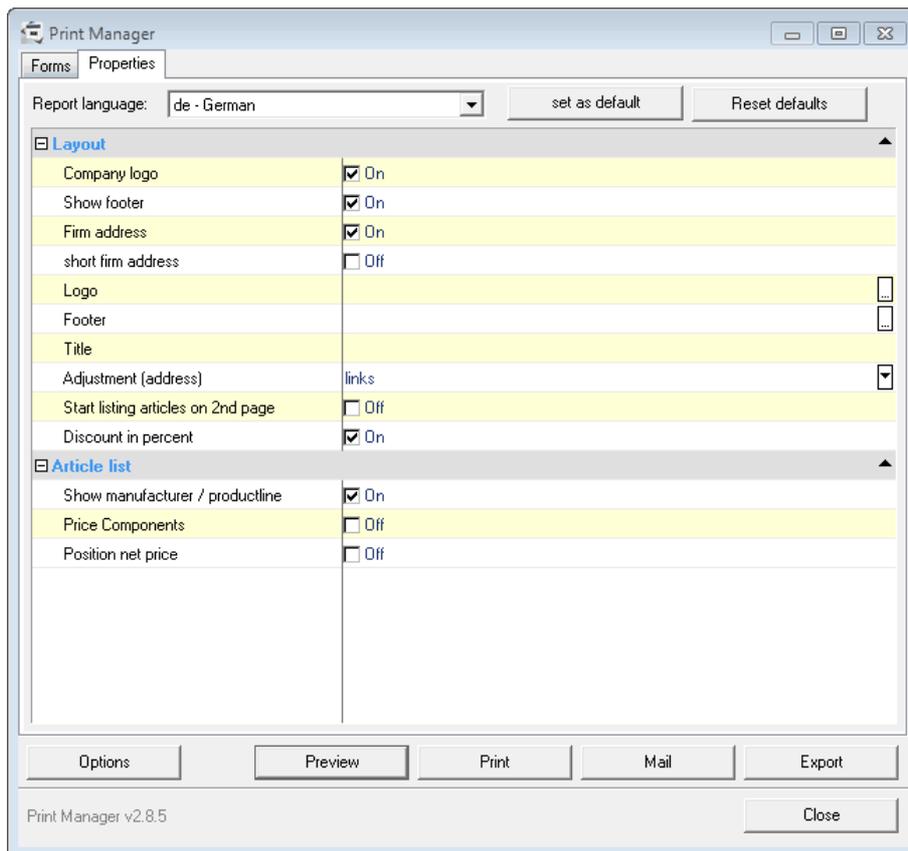
If your dealership has more than one user, it's recommended that you use the loading of the text files method. You can have on a centralized location the needed text files so that you can easily update them.

If you close the current file and open a new one you'll find the latest inserted text still there. This is due to the fact that these types of texts are quite static, like for example terms and conditions, meaning that you don't have to be always writing or loading them.

**NOTE:** The availability of the Texts tab in the Print Manager may depend on the type of pCon.basket license you own. If you also have the Organizer in use, this tab can be found in the Organizer Project Settings.

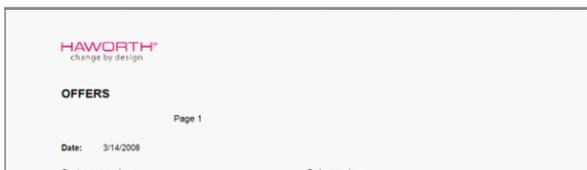
### 9.3 Properties

This section will be visible only for certain reports. It provides the user with the chance to define particular properties for the selected report.



*Properties window*

Typical examples include the option to enable/disable the company logo or the option to have a cover sheet.



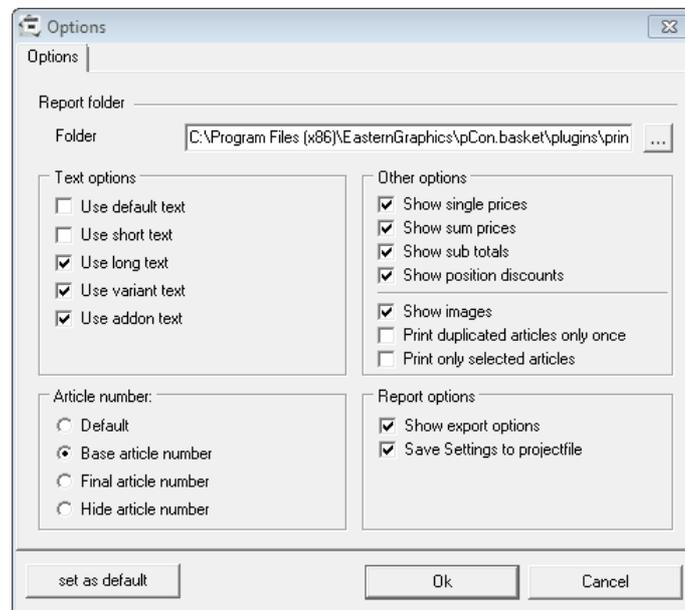
*Logo turned on*



*Logo turned off*

## 9.4 Options

You can set up several properties for all of the available forms. By selecting the *Options* button a new window will open up.



*ReportManager Options*

This window is organized in different sections. Each one of these sections enables you to define how to present these fields in the report.

To check the changes click on the *Ok* button and in the main print manager window activate the preview.

### 9.4.1 Text options

In this section, you can choose which type of text to enter under article description. You can have none or several text options selected. Choose between the following entries:

- *Default text*; displays the default description text
- *Short text*; displays the short text description
- *Long text*; displays the long text description
- *Variant text*, displays the article's properties which can be configured. This is a dynamic field since it is automatically updated when the user changes the products properties
- *Addon text*; displays the additional text when it is entered under the *User Text/Article* tab in the work space. If you don't want to display the manufacturer's standard commercial description you can turn all the other texts off and have only this field visible

The contents of each of these fields, with the exception to the addon text, depend on each manufacturer commercial description. For example, one manufacturer can have the article code available in the standard text while other may not.

Description	Amount
 Professional chair with armrests permanent contact plastic base cm. W 60 x D 59 x H 92	1

**Default text**

Description	Amount
 Surface's colour: 12/0008 Wheel's kind/sliding: Castors for hard floors Structure's colour: Chromed Fixed code: ILC10RGCA08	1

**Variant text**

Description	Amount
 THIS IS AN ADDITIONAL TEXT	1

**Addon text**

### 9.4.2 Article number

In this section, you can choose which article code you want to make visible. You have the following options:

- *Default*; in most cases the default article number is the basic article number
- *Base article number*; displays the basic article number, which usually represents the model base number
- *Final article number*; displays the complete article number, which is normally the model base number plus all the remaining configuration options translated into the article number.
- *Hide article number*; no article number will be visible in the offer

Pos	Description	Amount
1	 H10	1

*Basic article number*

Pos	Description	Amount
1	 H10118	1

*Complete article number*

### 9.4.3 Other options

In this section, you can select how to display the article's prices and images. You have the following options:

- *Show single prices*, displays an article's unit price, which is the price of each single article
- *Show sum prices*, displays an article's total price, which is the price of each single article multiplied by the quantity
- *Show sub totals*, displays a folders's partial total. You have to activate the 'show subtotal' option in basket's main window. See section [Group settings](#) for further details.
- *Show position discounts*, displays the discounts/up charges applied to the articles

Pos	Description	Amount	Unit price	Total
1	Meeting Room		Single prices	Sum prices
1.1	Standard - Office elements GOIEXTA1 Table, config., slideable top, height adjustable. Discount 1 (15,00 %)	1	894,20 EUR	894,20 EUR -134,13 EUR
				Position discounts
1.2	Standard - Office elements GOIEXTA3 Corner table	1	1.105,80 EUR	1.105,80 EUR
				
	Sub total: Meeting Room			Sub total 1.865,87 EUR

You also have these extra two options available:

- *Show images*, displays an article's image in a pre-defined location. The image accurately represents the object with all of the configurations performed by the user. For further information on how to change the standard image display see section [Image manipulation](#).
- *Print duplicated articles only once*, displays a repeated article image and description only once. For duplicates only the article code and the original position reference will be visible. Duplicate articles are articles with the same article code and configuration options.

Pos	Description	Amount	Unit price	Total
1	L661218 	1	EUR294.00	EUR294.00
2	L661218 ref. position 1	1	EUR294.00	EUR294.00

*Position 2 represented as a duplicate article*

- *Print only selected articles*, only articles selected in the article list will be shown.

#### 9.4.4 Report options

In this section, you can define the report language and the pdf export options:

- *Report language*, changes the report standard text to the available languages. See section [Common](#) on how to change the catalog languages so that you can display the commercial description in any of your manufacturer's available languages.
- *Show export options*, by enabling this option you'll be presented a series of options before pCon.basket creates the offer pdf file. See section [Save as pdf](#) for further information.
- *Save Settings to project file*, by enabling this options all the settings you made will be saved in the project file (obk). If you share a project file with a colleague he will have the same settings for report as you have made and therefore see exactly how your report looked like.

### 9.5 Article/group print settings

There are properties which influence the printed offer and that are defined in the main pCon.basket window instead of the print manager window. This is due to the fact that all properties configured in the print manager window are valid for the entire offer, the following properties can be defined for a specific selection of articles and groups.

The article/group settings section is available under the tree section. Its properties change depending if the user selects an article(s) or a group(s).

#### 9.5.1 Article settings

To visualize the article settings select at least one article, you can select several articles and apply the print settings to all of them with one command.

Page break	before position
Article Image Position	default
Article Image Width	5.00 cm
Article Image Alignment	left

*Article format property section*

The following print settings are available:

- *Page break*, enables to set a page break before or after the selected position. Page breaks are usually defined as the last property setting.
- *Article image position*, enables to determine the vertical alignment – centered, above or below the text.
- *Article image width*, determines the size of the image in the printed offer. The default size is 5cm.
- *Article image alignment*, enable to determine the horizontal alignment – left, left to text, centered or right.

## 9.5.2 Group settings

To visualize the groups settings select at least one group, you can select several groups and apply the print settings to all of them with one command.

Show Subtotal	no
Page break	none
Folder Image Width	5.00 cm
Folder Image Alignment	left
Group sub positions	no

*Group format property section*

The following print settings are available:

- *Show subtotal*, enables the group(s) subtotal to be visible in the report. The subtotal will be visible at the end of the group and will display 'Sub total: [Group Name]'.
- *Page break*, enables to set a page brake before or after the selected position. Page breaks are usually defined as the last property setting.
- *Folder image width*, determines the size of the image in the printed offer. The default size is 5cm.
- *Folder image alignment*, enable to determine the horizontal alignment – left, left to text, centered or right.
- *Group sub positions*, enables to hide all articles belonging to the selected group(s). This is particularly useful when you have products which are made up of many articles. A common example is a partition wall, the client doesn't care the price or even the wall sub articles, it just cares how much each wall segment costs and its characteristics. As an alternative you can also use *Set Articles* instead of a folder with this option (see section [Set Article](#)).

Pos	Description	Amount	Unit price	Total
1	<b>Reception</b> This solution includes lower blue panels and maple tops. It's included an executive black chair. The sides are 2.4m by 2.4m with 11m height.			EUR6,147.00



*Width of 9cm*

*Center alignment*

Pos	Description	Amount	Unit price	Total
1	<b>Reception</b> This solution includes lower blue panels and maple tops. It's included an executive black chair. The sides are 2.4m by 2.4m with 11m height.			EUR6,147.00

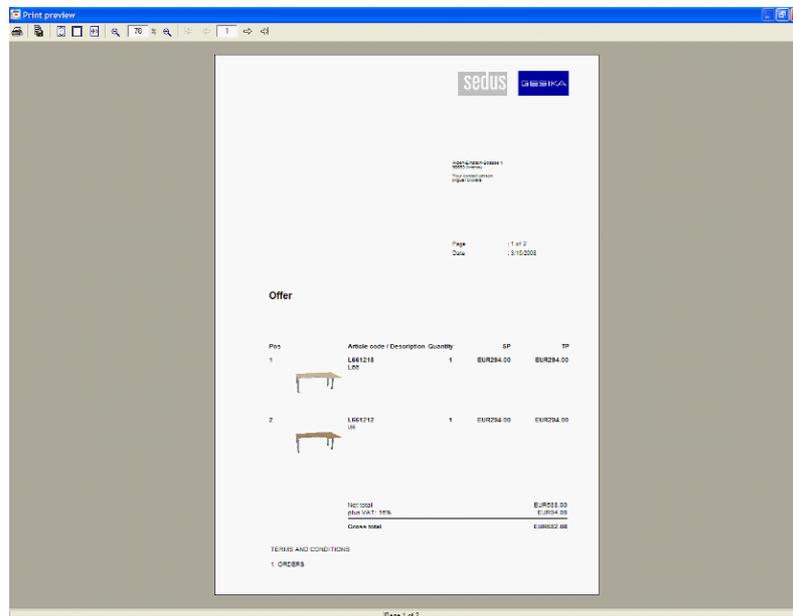


*Width of 4cm*

*Left alignment*

## 9.6 Preview

To see a preview of your offer press the 'Preview' button, a new window open up on top of pCon.basket.



*Print preview window*

On the top section of the screen you have several options:

- *Print report*, opens up the prints dialog box
- *Export report*, enables you to export the current report into several formats – pdf, xls, htm, rft, emf, wmf, jpg and bmp. The most used export type is the pdf format, for further information on how to use advanced export option see section [Save as pdf](#).
- *Fit height*, automatic zoom where the page height occupies the entire preview window
- *Actual size*, automatic zoom where the page is shown with its real physical dimensions
- *Fit width*, automatic zoom where the page width occupies the entire preview window
- *Zoom in/Zoom out*, enables you to zoom in and out of the page. The zooming can be done step by step or by setting the desired zooming percentage
- *Page navigation*, enables you to jump to the first page, go to the previous page, go to the next page or jump to the last page

### 9.6.1 Save as pdf

When saving a report as a pdf you can have great control over how your pdf file is created. To ensure that these extra options are available you have to select '*show export option*' from the options dialog window, see section [Report options](#).

You'll be asked to define the offer's file name, after selecting OK a new window will show up. In this window you can define several extra options. Following we'll highlight the most important ones:

- *Optimize Image Export*, Images are compressed before exported.
- *Use JPEG Compression*, by activating this option the whole file is compressed. You achieve a smaller file size but compression artifacts appear.
- *Compression Level*, according to the compression level the file size can be reduced. With high compression rate the image artifacts get worse.

## 10 IMPORT AND EXPORT

For further information on how to import an article list of project started in pCon.planner or pCon.xcad see section [Import](#).

By selecting *File* → *Import* you have the possibility to import an OBX file. OBX is the OFML Basket Exchange format. Previously exported pCon.basket items can be imported into a project. That way the exchange and re-use of position data will be simplified drastically.

pCon.basket allows you to save offers under different formats. By selecting *File* → *Export*, the following options appear:

- *Export Default*

This command allows you to export the offer to the format selected under *Tools* → *Preferences* → *Exports* → *Export Default*. In fact, by selecting a format among those offered with this command, it will become a type of export that you will use frequently.

- *CSV*

Create a .csv file, which you can open in Excel and that allows you to enter the offer created with pCon.basket in an .XLS document.

- *RTF*

Create a .rtf file, which you can open in Word and that allows you to enter the offer created with pCon.basket in an .DOC document.

- *GARB2IO*

Create a compatible file with software for interior design, very common in Germany.

- *OBX*

Selected articles of an open pCon.basket project can be exported in the native format of the Basket (OBX – OFML Basket Exchange). Either the articles can be stored in a file or passed to an external application. Vice versa, previously exported Basket items can be imported into a project.

A PDF export is possible by using the Print Manager (see [Printing Offer](#)).

**NOTE:** The availability of the different Imports and Exports may depend on the type of pCon.basket license you own.

## 11 UPDATE BASKET ARTICLES

With the pCon.basket update concept you have the possibility to update old projects to the latest installed product data. For example a customer wants to order a workstation once again he has ordered one year ago. In between this year the prices have changed. Also some of the articles don't exist anymore and for some articles the configuration is not supported anymore. The Update function of pCon.basket will help you to find all those articles and to migrate them to the latest product data.

	Position
	1.1
? 2	
	1.1.1
? 3	

Article List    Corr

There are different updates states an article can have:

- *Unknown*: displayed by the following icon 

The system has not yet checked whether this article is supported by the current installed data. After opening a project all articles will have this state.
- *Updateable*: displayed by the following icon 

The article and its current configuration are supported, but prices and texts are not yet updated. This state is assigned if you watch the configuration of an article in the configuration tab without changing any property.
- *Up-to-date*: displayed by the following icon 

The article and its current configuration are supported. Prices and texts are updated.
- *Migrate-able*: displayed by the following icon 

The article is available in the current installed product data but the configuration is not supported.
- *Migrated*: displayed by the following icon 

The article is available in the current installed product data but the configuration was not supported. The system has made an automatic migration to the latest data version and reproduces the configuration as far as possible.
- *Invalid*: displayed by the following icon 

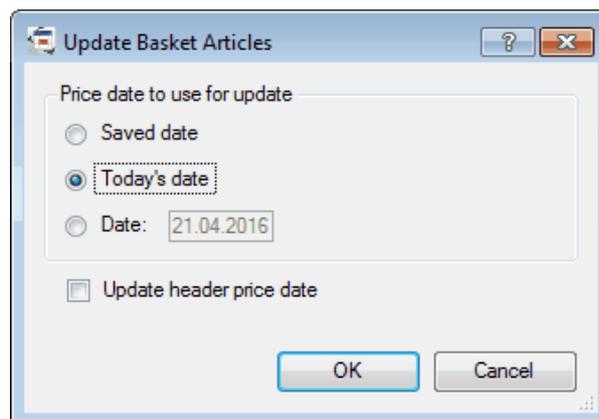
The article does not exist in the current installed product data.

## 11.1 Update articles

There are two ways to update articles

1. Select the article and go to Extras → Update Basket Articles. A dialog will then be displayed. Within this dialog you can decide for the selected article whether
  - to use the [price date](#) already saved within the project (Saved Date)
  - to assign the article the current date as the [price date](#) (Today's Date)
  - to enter a new date (Date).

In addition, here you can choose whether or not to adjust the price date of a project (Update project price date). This option is available for *Today's Date* as well as a manually-entered *Date*. If this option is enabled, the [price date](#) will be adjusted for all selected articles during the update process, and the date for all articles will be adopted by all subsequent articles that you insert into the project. If this option is disabled, the entered date will be updated for all selected articles. Articles that are later inserted will maintain the saved date that is set on a planning level.



*Article update with price date*

After pressing *Ok* all selected articles are checked. If they exist and their configuration is supported prices and texts are updated.

2. Select the article and go to the *Configuration* tab.

If the article exists and the current configuration is supported, the properties of the article are shown. If you don't change any property the price and text will not be updated (state: *updateable*). As soon as you change any property price and text will be updated (state: *up-to-date*).

If you want to update the whole project at once select all articles (Ctrl + A) and call *Extras* → *Update Basket Articles*.

**NOTE:** If you do not want to work with [multiple price lists](#), always select *Today's Date* during the update. The article will then keep its current price. This corresponds to the update process of earlier version of

pCon.basket.

In this case, please update your project every time you open it. In addition, you have to check *Update project price date* in order to change the project price date to the current date. This done, articles will be inserted using today's date.

**NOTE:** If you open a project that does not yet have a [price date](#) the article Price Date will initially be shown as *not set*. When updating with the option *Saved Date*, the selected items will maintain the current date.

## 11.2 Migrate articles

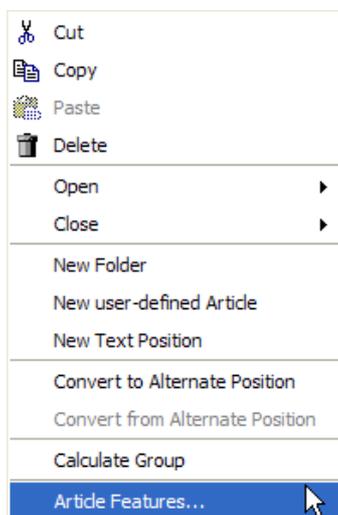
Articles with the state *migrate-able* exist in the current installed product data but their configuration is not supported anymore (e.g. because there is one property missing in the new data or a specific finish color was discontinued). Those articles can be migrated to the latest data automatically:

1. Select all articles you wish to migrate.
2. In the pCon.basket menu go to *Extras* → *Migrate Basket Articles*. A dialog will then be displayed. Within this dialog you can decide for the selected article whether
  - to use the [price date](#) already saved within the project (Saved Date)
  - to assign the article the current date as the [price date](#) (Today's Date)
  - to enter a new date (Date).

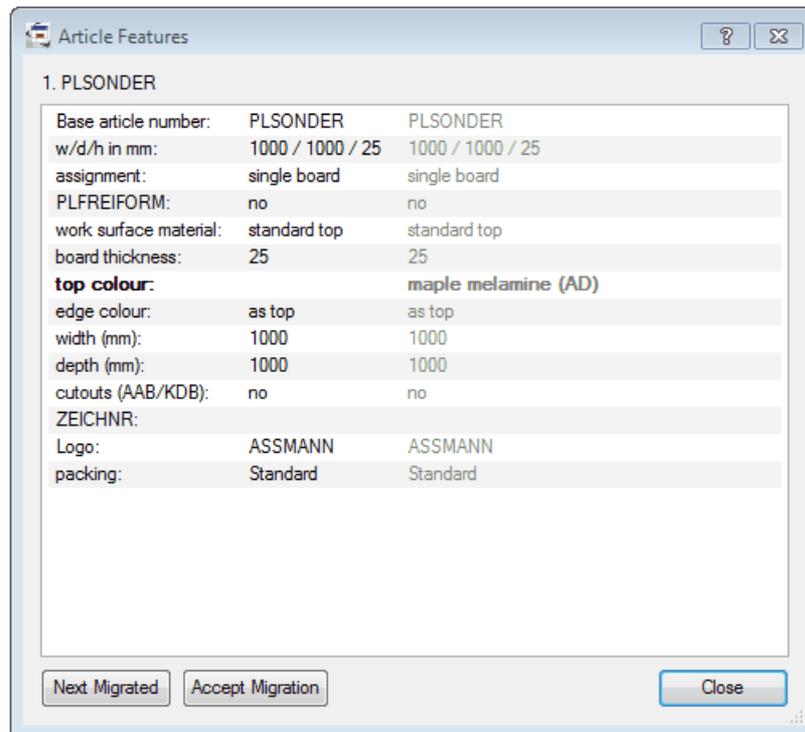
In addition, here you can choose whether or not to adjust the price date of a project (Update project price date). This option is available for *Today's Date* as well as a manually-entered *Date*. If this option is enabled, the [price date](#) will be adjusted for all selected articles during the update process, and the date for all articles will be adopted by all subsequent articles that you insert into the project. If this option is disabled, the entered date will be updated for all selected articles. Articles that are later inserted will maintain the saved date that is set on a planning level.

All articles migrated by the system get the symbol  in the article list.

3. You can now check the automatic migration of an article. In the article tree make a right mouse button click over the article and select *Article Features...*



- A new window opens where you see the current (middle column) and old (right column) configuration of this article.



Article Features window

- To change the current configuration go to the tab *Configuration* of pCon.basket. The *Article Features* window will stay opened.
- After completing your changes to the configuration click the *Accept Migration* button. The system will now delete the original configuration and show only the current configuration in the *Article Features* window.
- Using the button *Next Migrated* you can jump directly to the next automatic migrated article in the article list to check his configuration.

During the automatic migration through the system all calculation information (quantity, discounts, surcharges, etc.) is maintained.

## 12 INTEGRATION

pCon.basket allows the integration of the commercial information contained in the offer into other systems. The integration can be done with a dealer's internal system or with the manufacturer's order entry application.

### 12.1 Dealer integration

The integration of the offer information contained in pCon.basket can be done with two perspectives, both of which bring important benefits to your dealership.

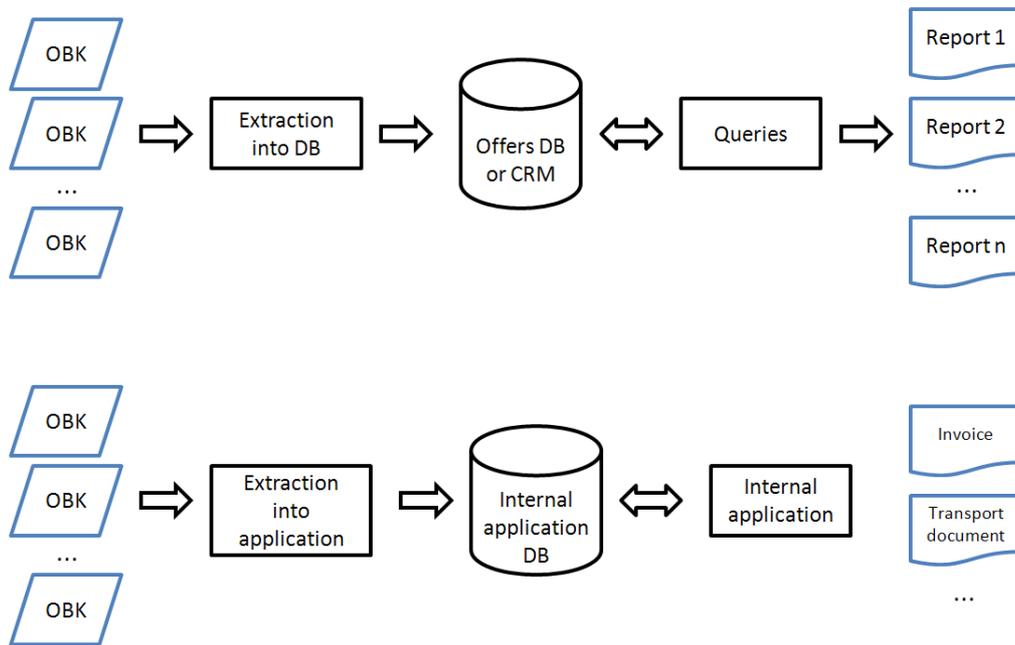
For further information on how to integrate pCon.basket's contact your local EasternGraphics team. We'll provide you with all the necessary information.

#### 12.1.1 Commercial analysis

To correctly manage your sales it's very important to have the possibility to have real time information on the offers being created by the sales team. For example, at the end of each day, in an automatic way and without extra work from the sales reps, it would be important to have information like:

- What's the total value of the proposals send out?
- What was the percentage for each type of product series?
- What was the percentage by ZIP code?

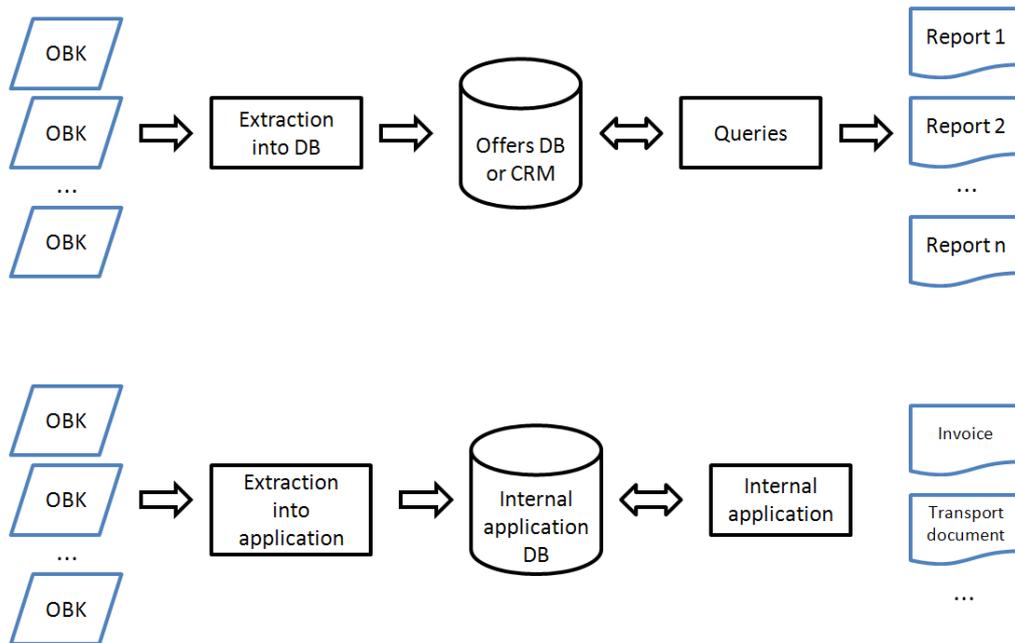
With this type of information available real-time your business can be managed from a reactive to a more proactive way. You don't have to wait for the end of the sales process to identify potential problems in your sales pipeline.



*Scheme of proposals integration process*

### 12.1.2 Order processing

If an offer becomes an order you can extract the commercial data contained in it and integrate it in your dealership internal management system. This way you don't have to manually type the offers which become orders again in your internal system.



*Scheme of order integration process*

## 12.2 Manufacturer integration

Many manufacturers have created an integration process from pCon.basket into their internal order entry systems. This integration represents an important reduction on manual work, decreased error reduction, increased savings and efficiency for both dealerships and manufacturers.

The specific process of sending an order depends from manufacturer to manufacturer. But it usually involves uploading an file through a web page. Once received the manufacturer integrates it into their internal ERP (Enterprise Resource Planning) application for processing.

Please contact the manufacturer's you represent for further information on their order entry process.

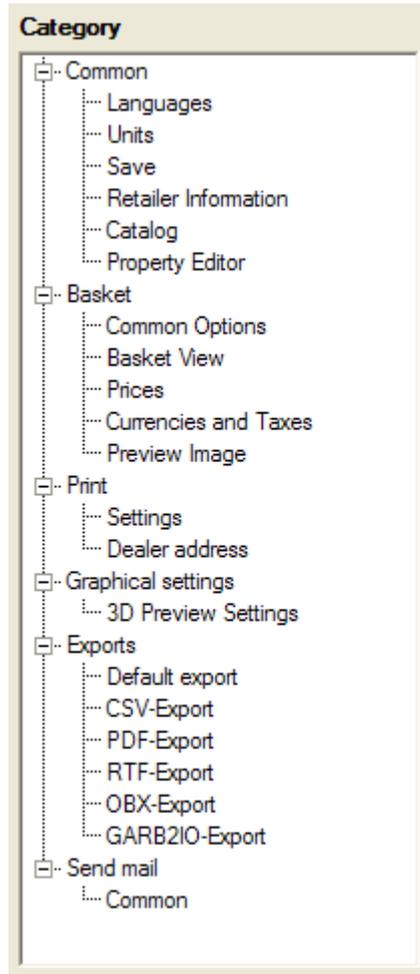
## 13 SETTINGS

It is possible to personalize pCon.basket. The *Extra* → *Preferences* command opens a dialogue window divided into categories which contain various options organized by subject.

### 13.1 Common

In the *Common* category, you can configure preferences under the following entries:

- *Languages*; allows you select the preferred language for the data and catalogues.
- *Units*; allows you to select the unit of measure for lengths in meters, centimeters, etc, decimal numbers, the unit of measures for angles and their precision.
- *Save*; configure the time interval between automatic saves of the offer.
- *Retailer Information*; allows you to enter personal data about the user.
- *Catalog*; allows you to configure the viewing methods for articles in the catalog and choose the font and size of the descriptions.
- *Property Editor*; allows you to choose whether to view the article properties (color and finish) by name, code (key only) or both (key and text).

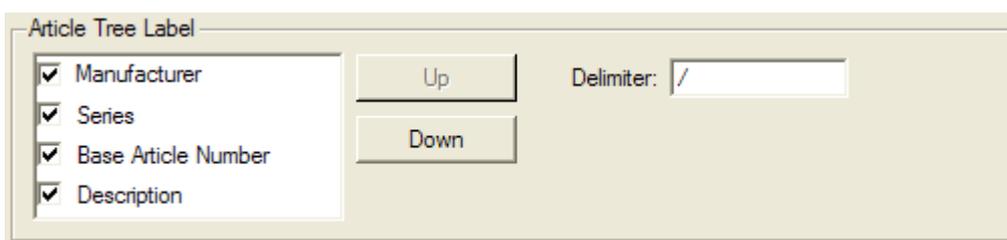


Categories of pCon.basket settings

## 13.2 Basket

In the *Basket* category, you can configure preferences under the following entries:

- *Common Options*; allows you to choose if you want to be asked for confirmation each time you delete an article. Furthermore you can define when the system should check the articles for consistency, so whether the articles are fully configured and valid. Also you can set what information should be shown in the article tree for each article, in what order they should be shown and what sign should be used for separating the information.



Settings of article tree label

- *Basket View*; allows you to select the default application basket view for new projects. For information on how to define a project view see section [Default view](#) and [Change Default view](#). If you want to create a new project view or want to change a project view the way of working is the same as shown under [Select](#), [Columns](#) and [Display modes](#). Furthermore you can define which views should be added to already existing projects if they don't exist there. This could be the case for example if you get a project from a colleague or a project which has been created with pCon.xcad.
- *Prices*; you can set percentages of purchase or sales prices in this dialogue window. These percentages refer to the series and will be used every time an article of this series is inserted. If you want to define the percentages on manufacturer level please deselect the option *Series-specific Configuration of Purchase Value and Sales Price*.
- *Currencies and Taxes*; allows you to set default country, currency, rounding mode for prices and VAT, which will be used when new projects are created. Also you can change the exchange rates for new projects here. With the button *Reset* in the tab *Exchange Rates* you can reset all exchange rates to the rates pCon.basket brings with him during installation. If you want to change the country, currency, rounding mode, VAT or exchange rates for an existing project go to the Project Settings (see [Project properties](#)). If you want to apply the rounding settings to all existing projects when opening, activate the option *Apply rounding to existing projects*. For more details on the possible tax settings read the chapter [Module Taxation Schemes](#).
- *Preview Image*; offers a summary of the values that control the image print preview.

### 13.2.1 A side note to rounding

With pCon.basket it is possible to round article prices to full Euro/USD after a discount has been subtracted. The kind of rounding can be set individually.

The following rounding modes are available:

- **No Rounding**: pCon.basket will calculate in the same way as you are used to it.
- **Half away from zero**: With this rounding mode the system will round towards the nearest neighbor unless both neighbors are equidistant, in which case the system will round up (away from zero). For example:
  - 4.5 → 5.0
  - 5.5 → 6.0
- **Half towards zero**: This rounding mode also rounds towards the nearest neighbor unless both neighbors are equidistant. In that case the system will round down (towards zero). For example:
  - 4.5 → 4.0
  - 5.5 → 5.0
- **Half to even**: The system will also round toward the nearest neighbor. In case of equidistant neighbors the system will round towards the even neighbor. This rounding mode is also called Banker's Rounding. For example:
  - 4.5 → 4.0
  - 5.5 → 6.0

For every rounding mode additionally the interval can be defined:

- 0.01: The system will round to full cent. This is the same behavior as in previous pCon.basket versions.
- 0.05: The system will round always to full 5 cents. For example:
  - 4.56 → 4.55
  - 245.24 → 245.25
- 0.10: In that case it will be rounded to full 10 cents. For example:
  - 4.56 → 4.60
  - 245.24 → 245.20
- 0.25: This interval means that the price is always calculated to full 25 cent. For example:
  - 4.56 → 4.50
  - 245.24 → 245.25
- 0.50: The system will round to full 50 cents:
  - 4.56 → 4.50
  - 245.24 → 245.00
- 1.00: It will be rounded to full Euro/USD.
  - 4.56 → 5.00
  - 245.24 → 245.00

Since by rounding prices always an error occurs, pCon.basket only rounds the Total Position Net Price for single articles and in the header calculation only the Discounts and Additional Charges as well as the Final Amount. The VAT is not rounded.

### 13.3 Print

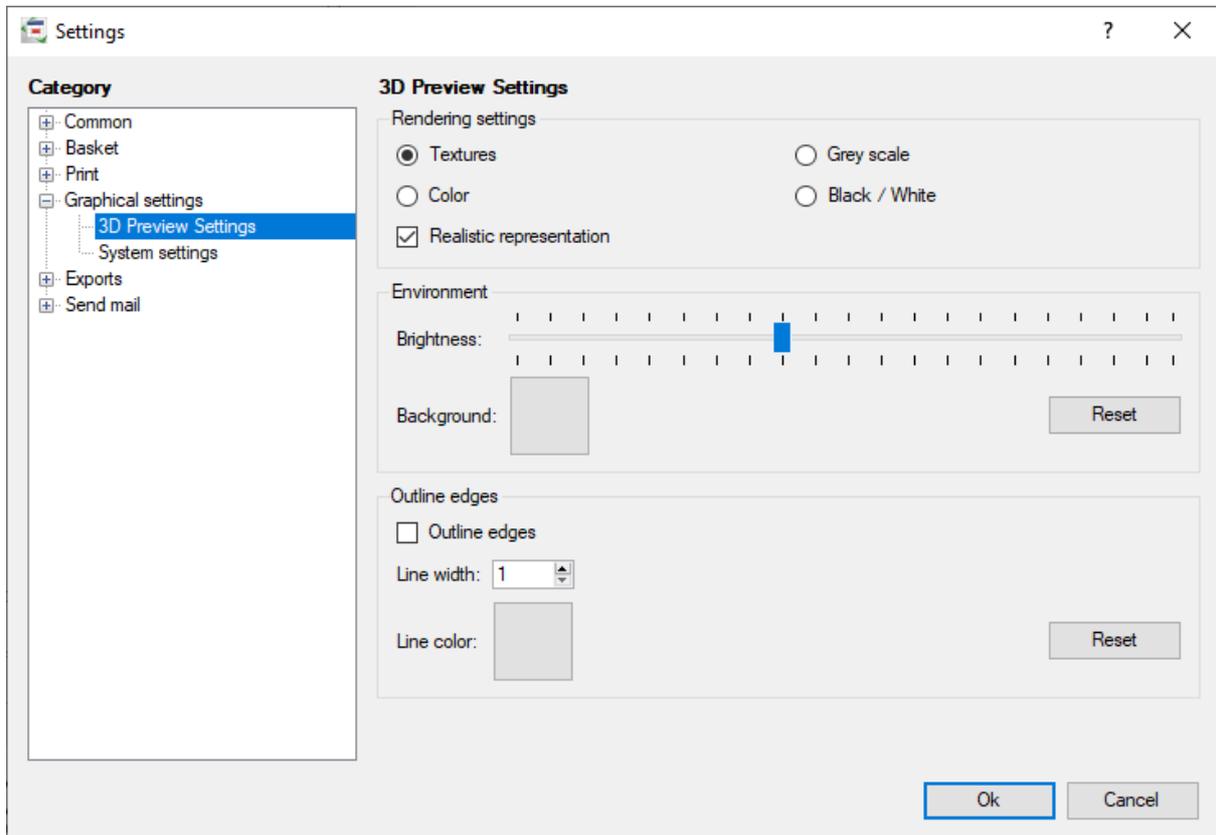
In the *Print* category, you can configure preferences under the following entries:

- *Settings*; opens the window that allows you to set the print parameters.
- *Dealer Address*; allows you to enter the wholesaler's address that will be used for the print job.

**NOTE:** The availability of the Print settings depends on whether there is a Organizer used or not. If the Organizer is used those settings will not be available.

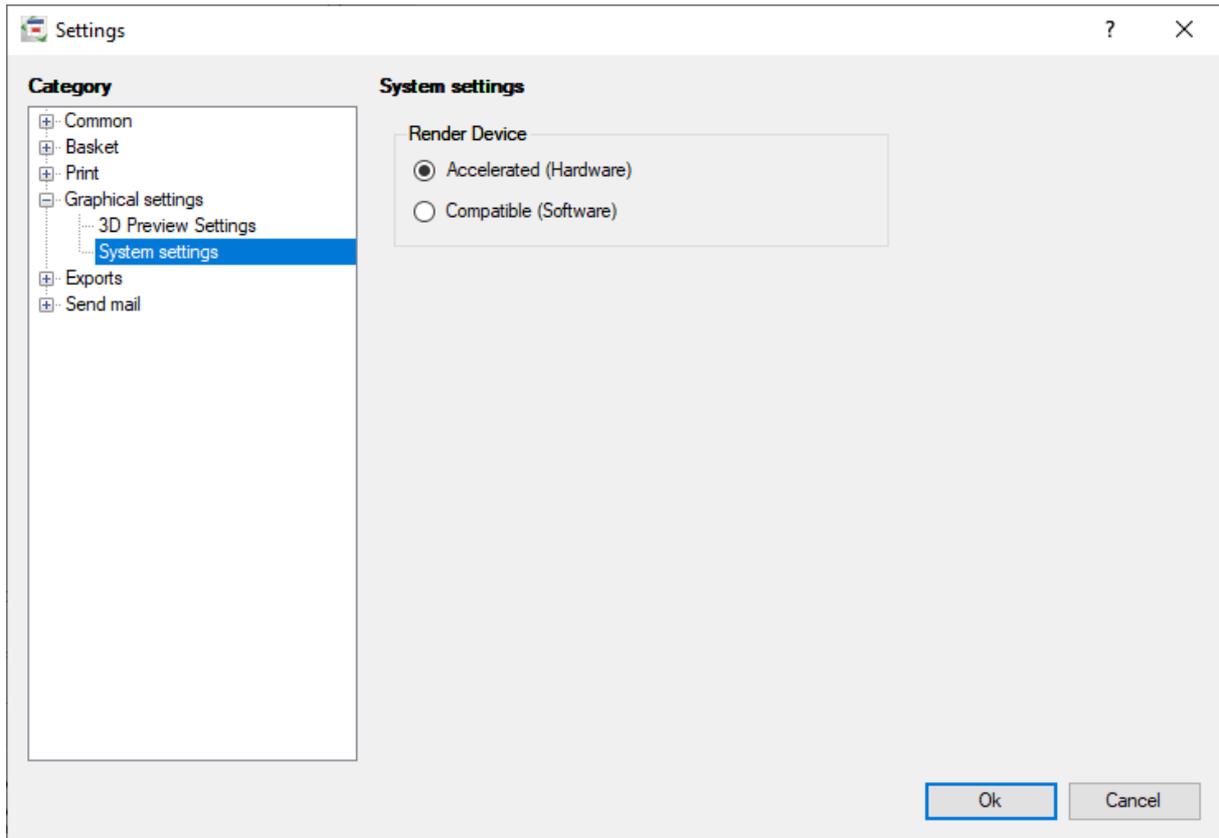
## 13.4 Graphic setup

- *3D Preview Setup*; allows you to set up the article's image view. E.g. you can set whether you want to have all article images with *Textures* and use the *Realistic representation* which is the best preview but makes high demands on the graphics hardware.



Setting of article image preview

- *System settings*: If there are display artifacts in the Configuration area, start the pCon.basket in Software mode (by activating the *Compatible (Software)* setting). Note: Under certain circumstances, the pCon.basket cannot be started to switch from *Accelerated (Hardware)* mode to *Compatible (Software)*. In this case, please contact your EasternGraphics sales partner.



### 13.5 Exporting

- See section [Import and Export](#).

### 13.6 Sending mail

- *General*; allows you to enter general data for sending exports by email.

## 14 MODULE TAXATION SCHEMES

With the additional module Taxation Schemes in pCon.basket you can define country and region specific tax rates. The function supports you for example when preparing an offer in France with showing the ECO-Contribution (according to the Valdelia specification) or creating an offer with several VAT rates (e.g. standard rate and reduced rate).

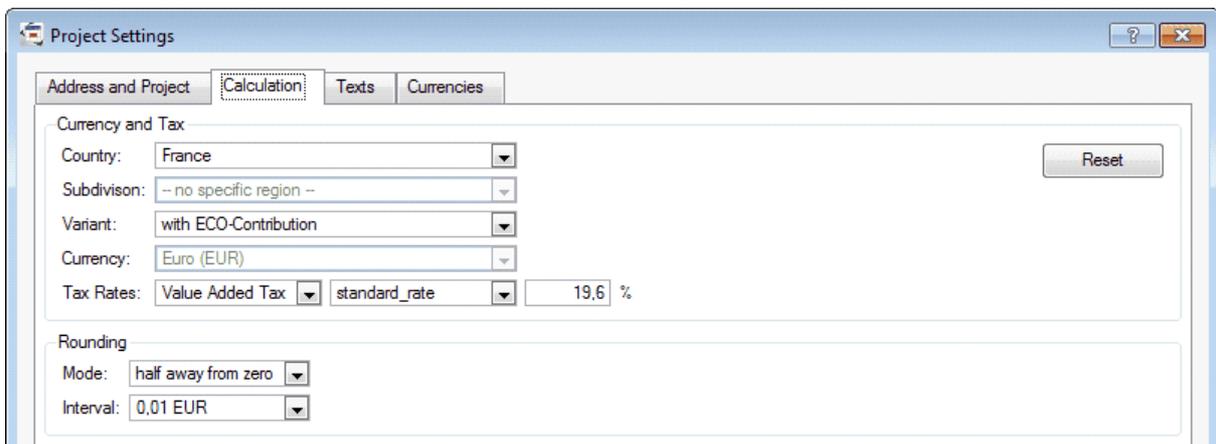
For activating the module you need an additional license for pCon.basket. If you are interested in this license please contact your local distribution partner.

**NOTE:** Please note that pCon.basket only supports the calculation of the French ECO-Contribution according to the office furniture scheme, which was defined by Valdelia. The calculation according to the home furniture scheme defined by Éco-mobilier is not supported.

### 14.1 Settings for the Taxation Schemes

In the menu bar select *Edit* → *Project Settings ...*. In the new window go to the tab *Calculation*. Under the category *Currency and Tax* select the country you want to do your offer for. The taxation scheme of this country will be used for the tax calculation. If you select a country which also differentiates its tax calculation by regions (e.g. USA), the property *Subdivision* is enabled and you can select the desired region (e.g. Texas).

In some countries there can be several variants of taxation schemes. For example the calculation of the ECO-Contribution in France is only necessary for the furniture market. If you want to do an offer for products which are not liable for the ECO-Contribution, select the *default variant*. It only calculates the VAT for France. In case you want to show the ECO-Contribution on your quote select the variant *with ECO-Contribution*.



The screenshot shows the 'Project Settings' dialog box with the 'Calculation' tab selected. The 'Currency and Tax' section contains the following settings:

- Country: France
- Subdivision: -- no specific region --
- Variant: with ECO-Contribution
- Currency: Euro (EUR)
- Tax Rates: Value Added Tax, standard\_rate, 19,6 %

The 'Rounding' section contains the following settings:

- Mode: half away from zero
- Interval: 0,01 EUR

*Project Settings with taxation scheme France*

You can only select a currency if the tax scheme variant is not depending on a fixed currency. For example the display of the ECO-Contribution is fixed to Euro, since the tax rates are defined in Euro.

For checking or changing the tax rates you first have to select the tax type (e.g. *ECO-Contribution*). In the second selection list you now see the available tax categories. Select the category you want to change the tax rate for. It will be displayed in the last field. You can now edit this value.

Currency and Tax

Country: France Reset

Subdivision: -- no specific region --

Variant: with ECO-Contribution

Currency: Euro (EUR)

Tax Rates: ECO-Contribution Seat (metal) 0,096 EUR/KGM

Rounding

Mode: no rounding

Interval: 0,01 EUR

- Seat (metal)
- Seat (wood)
- Seat (plastics)
- Seat (other material)
- Storage (metal)
- Storage (wood)
- Storage (plastics)
- Storage (other material)
- Workplace (metal)
- Workplace (wood)

*Selection of the tax category for France*

If you want to reset the tax rates of your currently opened project to the globally defined tax rates click the button *Reset*.

All settings mentioned above can also be done globally, so they will be preset for every new project. To do this go to *Extras* → *Settings* in the menu bar. In the category tree open the *Basket* entry and select *Currencies and Taxes*. With the button *Reset* in this dialogue you reset the tax rates to the values available in the pCon.basket installation.

## 14.2 Calculation of the tax

The tax will be calculated automatically by pCon.basket according to the selected tax scheme. For this pCon.basket reads the tax category for every inserted article from the OFML data and uses the according tax rate. In case of the French ECO-Contribution pCon.basket also reads the net weight of the article from the OFML data to multiply it with the tax rate. The result of the calculation is shown in the tab *Article Calculation*.

The tab *Header Calculation* shows the total of the calculated taxes.

Article Calculation						
	Description	Percent	Base	Absolute	Count	Total
<b>Base data</b>						
	Purchase Gross Price			300,00 EUR		1.500,00 EUR
	Vendor Discount	0,00 %	incr.	0,00 EUR		0,00 EUR
	Purchase Value			300,00 EUR		1.500,00 EUR
	Sales Price			300,00 EUR	5,00 x	1.500,00 EUR
<b>Discounts and additional charges</b>						
<input checked="" type="checkbox"/>	<a href="#">? Rabatt 1</a>	0,00 %	incr.	0,00 EUR		0,00 EUR
<input checked="" type="checkbox"/>	<a href="#">? Rabatt 2</a>	0,00 %	incr.	0,00 EUR		0,00 EUR
	Position Net Price			300,00 EUR		1.500,00 EUR
<b>Header discounts and additional charges</b>						
	Rabatt 1	0,00 %	incr.	0,00 EUR		0,00 EUR
	Rabatt 2	0,00 %	incr.	0,00 EUR		0,00 EUR
	Aufschlag 1	0,00 %	PNP	0,00 EUR		0,00 EUR
	Aufschlag 2	0,00 %	PNP	0,00 EUR		0,00 EUR
<b>Totals</b>						
	Net Total			300,00 EUR		1.500,00 EUR
	ECO-Contribution			14,92 EUR		74,60 EUR
	Value Added Tax	19,60 %		61,724 EUR		308,622 EUR
	Gross Total			376,644 EUR		1.883,222 EUR
	Margin	0,00 %		0,00 EUR		0,00 EUR

Article List | Configuration | Article Calculation | Header Calculation | Texts/User-defined Articles | Catalog Information

Article Calculation for an article liable for ECO-Contribution

The ECO-Contribution can only be calculated for an article if all relevant information (tax category and net-weight) is maintained in the OFML data. If the information is not available, the tax is not shown and in the field *Gross Total* the value *???,?? EUR* is shown. If you want to add the information for the ECO-Contribution calculation manually [convert the article into a user-defined article](#).

<b>Totals</b>						
	Net Total			1.353,60 EUR		1.353,60 EUR
	Gross Total			???,?? EUR		???,?? EUR
	Margin	0,00 %		0,00 EUR		0,00 EUR

The information for calculating the ECO-Contribution is not available in the OFML data

## 15 SYSTEM REQUIREMENTS

Export Formats:

- CSV, RTF, OBX, GARB2IO

Supported Data Formats:

- OFML

Languages:

- English
- German
- French
- Italian
- Spanish
- Dutch

The latest system requirements are available on our [website](#).

## 16 Support

We work hard to increase the quality of our products. Nevertheless, during the use of our software, problems or questions may arise. In such cases please contact our Support department.

E-mail: [support@EasternGraphics.com](mailto:support@EasternGraphics.com)

Phone: + 49-(0)3677-678233

You may contact us

Mon – Thu 9:00 – 17:00 C.E.T.

Fri 9:00 – 14:00 C.E.T.

Please include the following information always into your support request:

- the version of your product,
- a detailed description of the problem or error,
- in case of error, the specific workflow that caused this error,
- the error message as such and
- information about your system environment

Additionally, we look forward your hints and wishes concerning our products and service.

Further information around our Service can be found on our web-site <http://www.EasternGraphics.com>.

## Legal remarks

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