

pCon.basket Online 2.13 New Features

pCon.basket Online 2.13 – New Features

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1 Workflow

1.1 Opening and Saving of Projects

Beginning with the autumn release, quotes (OBK files) can directly be opened and saved. No upload or download is necessary for you to work directly on the file. When saving your project, the file will be overwritten directly in your local directory. This enables saving your file during the editing process.

This enhancement allows you to work directly from local directories. These directories can be synchronized with a cloud service of your choice. Therefor you will no longer need an Office365 account for loading and saving your quotes.

pCon.basket PRO	■ pCon.basket PRO	Standard contract price_recovered.obk							
	Header Data Article List Calculation Report								
New Quote	🛐 🗏 💥 🗍 📋 🗄 v 🖪 Catalog 🗅 Folder 🗹 User Article 👘 Set Article 👖 Text								
Coren Quiate	^ □ 1 Type A - Likewood top								
Ciperi Quote	⑦ 1.1 Desk 2200 x 1000 m 1 Type A - Likewood top								
	⑦ 1.2 Sedus mastermind a								
	⑦ 1.3 Mobile pedestal 9 h 1.1 Desk 2200 x 1000 mm								
	② 1.4 Sedus crossline swiv								
	 1.2 Sedus mastermind accessories mm-000 Sedus seating & conference furniture mastermind accessories 	ermind							

Image 1: Opening and Saving of Quotes

Note: This feature is only available in Chromium-based browsers like, for example, Google Chrome or Microsoft Edge.

Edition: Pro / CE



1.2 Access to Recent Files

Whilst opening quotes or importing article lists, we do now provide you with access to your recently used quotes. The *Open* dialog displays up to 20 recently opened files to choose from.

Recent Files	
2019 Standard contract price_recovered.obk Lange Artikelliste.obk	ß
Name: 00000005.obk Last Used: 9/9/2024, 11:18:57 AM	Click to select a file or use drag and drop. Supported file formats: .obk,.obx,.pec,.pbox
00000005.obk	

Image 2: Recently used Files

Note: This feature is only available in Chromium-based browsers like, for example, Google Chrome or Microsoft Edge.

Edition: Pro / CE



1.3 Restoring Deleted Articles



In this tutorial video, we'll show you how to use the Recycle Bin in pCon.basket to restore individual articles and entire planning groups.

Restore Deleted Articles: Recycle Bin in pCon.basket

More safety while editing complex projects and when deleting articles is granted by the new restore feature. All articles that are deleted during your active session are kept in the *Recycle Bin* and displayed as a separate list.

When the bin is opened, the deleted articles are displayed following the order of the delete action, starting with the last deleted article. In addition, the time of deletion is displayed.

Header Dat	Recycle Bin							
	🔿 Restore Items 🔋 Empty Recy	cle Bin						
^ □ 1 0	↑ ⑦ 1 Abzug	#	Deleted	Image	Description	SP in EUR	Quantity	TP in EUR
1	 ⑦ 1.1 Elektronik und Elektro ⑦ 1.1.1 Elektrogruppe Vol. 	1	14:35:15		Abzug 400-00006 Köttermann GmbH Abzug	4,560.00	1	4,560.00
1	③ 1.1.2 Fußtaster ③ 1.1.3 AutoProtect	1.1	14:35:15		Elektronik und Elektromechanische Gruppe 437-00161 Köttermann GmbH Abzug	1,959.00	1	1,959.00
1 1	1.2 Lichtgitter	1.1.1	14:35:15		Elektrogruppe Volumenstromsensor 861-00029 Köttermann GmbH Abzug	612.00	1	612.00
1 1	 ① 1.3 Elektroeinspeisung ③ 1.4 Tischplatte 	1.1.2	14:35:15		Fußtaster 437-00026 Köttermann GmbH Abzug	159.00	1	159.00
1	 1.5 Zargengruppe Abzug 1.6 Fronthaubengruppe 	1.1.3	14:35:15		AutoProtect 861-00021 Köttermann GmbH Abzug	1,581.00	1	1,581.00
E 1		1.2	14:35:15		Lichtgitter 437-00158 Köttermann GmbH Abzug	1,150.00	1	1,150.00
1 [] 1		1.3	14:35:15		Elektroeinspeisung 861-00040 Köttermann GmbH Abzug	114.00	1	114.00
1 1		1.4	14:35:15		Tischplatte 561-00200 Köttermann GmbH Abzug	1,524.00	1	1,524.00
	a -	1.5	14:35:15		Zargengruppe Abzug 433-00000 Köttermann GmbH Abzug	43.00	1	43.00
		1.6	14:35:15	$t_{i,j} \in \mathbb{R}^{n}$	Fronthaubengruppe 861-00030 Köttermann GmbH Abzug	66.00	1	66.00
C De	ß							

Image 3: Recycle Bin

Furthermore, it is possible to empty the bin. All articles deleted thereafter are again added to the bin.

Note: The content of the bin is only available during your current session. If you create a new project or open a different project, the bin is automatically emptied.

Edition: Pro / CE / Integration



1.4 Enhanced Error Dialog

Please describe th were you trying t went wrong? Pro help you more ef	ne problen in as r o do when the pr viding us with de ficiently.	nuch detail as p oblem occurred tailed informatic	assible. Wha and what e n will enabl	at exacity exactly e us to
				3

We have added new options to the *Send Error Report* window. In addition to the error report, you can now optionally send the OBK file directly to the support.

Furthermore, you can use the text field to add more details on the error. Your text, including the error report (as an attachment), is then transferred to the mail client when opened.

Image 4: Error Report Dialog

Edition: Pro / CE / Integration

1.5 Copying Articles including Article Images

We enhanced the copying of articles between two instances of the same edition of pCon.basket Online. Besides the articles, version 2.13 does also insert individual article list images as well as additional article images. Thus, no information is lost when copying your articles.

Edition: Pro / CE / Integration

1.6 OBK Import

Besides importing OBX and PEC files, the autumn release enables you to import the article list from an OBK file to the existing project. This means that the relevant information can also be transported here, as described under 1.5. When importing, the header information including the *Header Calculation* of the project to be imported is not transferred.

Menu		Unnamed
ሰ Home	>	n Report
Save		🗸 🕐 🖪 Catalog 🗅 Folder 🗹 User Article 🌀 Set Article 🗊 Text
Save As	>	
→ Import	>	pCon Project (OBK)
📑 Export	>	pCon Article list (OBX)
 Document Informati 	ion	pCon Exchange Container (PEC)
🕸 Settings		All items of the pCon project (OBK) were imported. × Header data including the header calculation were not carried over.
•		

Image 5: OBK Import

Edition: Pro / CE / Integration



1.7 English as General Fallback Language

On the initial start of pCon.basket Online, English is set by default as first fallback language. This means that texts are available in the catalog and the article information in almost all cases, even if the data is not available in the selected quote language.

Edition: Pro / CE / Integration

2 Calculation

2.1 Import and Export of Price Condition Profiles

The *Manage Price Conditions* area in pCon.basket Online 2.13 allows you to import and export price condition profiles.

When exporting, the currently selected price condition profile is written to a CSV file. When importing, the content of the CSV file to be imported is written to the selected price condition profile. All entries are overwritten in the process. To create a new profile for import, it must first be created manually.

=	pCon.basket PRO		Manage Price Cond				
rofile	Testprofil	☆ ~ ➡ ⑮ 汝	- ⊉ ⊡ :	v Import profile]	
Ð	Manufacturer	Series	Pur inter G	Export profile	s	Price external	
	AGORA - AGORAphil GmbH	AGORAPURE - AGORApure	0 10 %	0	5 %		
	GI - Girsberger	*	5 %	•	2 %		

Image 6: Import and Export of Price Condition Profiles

Note: To edit a price condition profile in CSV we recommend using a text editor. It is not recommended to edit the file in Excel.

Edition: Pro



3 Report

3.1 New Template: Management Overview



In this tutorial video, we'll show you how to use the management overview template in pCon.basket PRO to efficiently summarize the most important information and automatically adapt it to the project volume.

Efficient Project Calculation: Management Overview in pCon.basket PRO

Beginning with version 2.13, pCon.basket Online provides you with an additional report template. The *Management Overview* template creates an overview of the calculation of the underlying project. This grants you to view the purchase as well as the sales calculation at a glance. The resulting margins per position, sorted by manufacturer and series, are also included. The calculation is also summarized at manufacturer and series level. This allows you to quickly examine the expected volume of the order.

Templates Management Overview View	· ·	Herr Max Mustermann Musterstraße 11 99999 Musterhausen Deutschland										Erstell Angeb	datum otsdatum			02.10.24 28.02.23	
				Brut	to EK	Einkaufs	rabatt		Brutto	Verkauf	srabatt	Positi-	Kopfra- batte / Aufschlä-	Netto-	Mar	ge	
Header	~	Hersteller / Serie Pos. Artikel	Mg.	Einzel	Gesamt	in %	in EUR	EK	VK	in %	in EUR	netto	ge	wert	in EUR	in %	
Articla List		Summe VI Vitra			32.167,24	0,00	0,00	32.167,24	32,167,24	-1,07	-345,68	1.821,56	-3.182,16	28.639,40	-3.527,84	-12,32	
		Summe C Classic Collection	1701000440 000		8.743,71	0,00	0,00	8.743,71	8.743,71	-2,73	-238,66	8.505,05	-850,50	7.654,55	-1.089,16	-14,23	
Prices	~	1.1.1 EAS DAW Plastic Armch	air m.SP 4	596,64	2.386,56	0,00	0,00	2.386,56	2.386,56	-10,00	-238,66	2.147,90	-214,79	1.933,11	-453,45	-23,46	
		1.2.1 EPC DAX Fiberglass Am	ichair 4	697,48	2.789,92	0,00	0,00	2.789,92	2.789,92	0,00	0,00	2.789,92	-278,99	2.510,93	-278,99	-11,11	
Page Breaks	^	2.1 EPC LSR Plastic Side Ch	air 8	348,74	2.789,92	0,00	0,00	2.789,92	2.789,92	0,00	0,00	2.789,92	-278,99	2.510,93	-278,99	-11,11	
-		2.2 EFC DAX Hberglass Arm	ichair m.SP. 1	111,31	777,31	0,00	0,00	///,31	777,31	0,00	0,00	111,31	-77,73	699,58	-77,73	-11,11	
📲 Page Break 🥒 Edit 🔲 Delete		Summe CT Earnes Tables			7.163,87	0,00	0,00	7.163,87	7.163,87	0,00	0,00	7.163,87	-716,39	6.447,48	-716,39	-11,11	
		1.1.2 EAT Earnes Seg. Tab. Uin	ing bo.2200x1100(- 1	7.163,87	7.163,87	0,00	0,00	7.163,87	7.103,87	0,00	0,00	7.163,87	-710,39	0.447,48	-716,39	-11,11	
		Summe HT Home Residential	2	0.00	10.991,60	0,00	0,00	10.991,60	10.991,60	0,00	0,00	0.00	-1.099,17	9.892,43	-1.099,17	-11,11	
		1.1.4 Suita Sota	Pintent Chan 1	5.046.74	0,00	0,00	0,00	5.040.74	0,00	0,00	0,00	5.040.74	0,00	00,0	0,00	0,00	
		1.1.4.1 SU2 Sola 3-Seater offer	m.Ruckenk.class.	3.040,74	3.040,74	0,00	0,00	3.040,74	5.040,74	0,00	0,00	5.040,74	-304,00	3.203,00	-304,00	-11,11	
		1.1.4.2 SU2 Chaise Longue gro	ss m.Ruckenk.Clas: 1	5.142,80	3,142,50	0,00	0,00	3,142,80	3,142,80	0,00	0,00	3 305 97	-514,29	4.028,57	-514,29	-11,11	
		Summe R2 Nome Retail		83.10	415.05	0,00	0,00	415.05	415.05	0,00	0,00	416.05	-220,39	1.985,28	-220,59	-11,11	
		1.1.5 Herningbone Hoows, bi	au 5	63,19	413,93	0,00	0,00	412,92	412,92	0,00	0,00	413,95	141,00	3/4,35	170.00	511,11	
		2.3 EAT CO.Ta.quad.Marmo	r weiss UG Esche s	1.789,92	712 45	0,00	0,00	712 45	1.789,92	15.00	107.03	606.42	-1/8,99	545 70	-1/8,99	-11,11	
		Junime NC Netson Collection		717.46	713,45	0,00	0,00	713,45	713,45	15,00	107,02	000,45	50.54	545 70	-107,00	-30,74	
		Europe DB L Berner	e schwarz kurz	/13,43	713,43	0,00	0,00	713,45	2 748 74	-15,00	0.00	3 3 49 74	734 87	343,79	774 87	-30,72	
		12.2 PPE Tisch Compare Dire	ation 1250-600mm 1	2 2 4 9 7 4	2.340,74	0,00	0,00	2.340,74	2.340,74	0,00	0,00	2.340,74	-234,07	2.113,67	-234,67	-11,11	
		1.2.2 Pite risch compasible	2001 1200000000000000000000000000000000	2.340,74	2.340,74	0,00	0,00	2.340,74	2.340,74	0,00	0,00	2.340,74	-234,07	2.113,07	-234,07	*11,11	
		Gesamtpreis			32.107,24	0,00	0,00 .	32.107,24	32.107,24	-1,07	-345,08 .	1.821,30	-3.182,10	28.039,40	-3.327,84	-12,32	

Image 7: Template: Management Overview

The following new options are available for this template:

- Page Layout: A4/A3
 - Clear presentation by switching between A3 and A4 formats depending on project size.
- Article: Yes/No
 - Defines whether the individual articles are printed or whether the information is only output at manufacturer and series level.
- Include optional articles: Yes/No
 - \circ Controls whether optional articles are included in the overview and therefore also in the calculation.

Note: Alternative positions are not included in the management overview.

Edition: Pro / Integration



3.2 New Options

3.2.1 Total Price incl. Optional Positions

A new option has been added to the standard quote. It is now possible to display the total price for the optional positions as well as the total price including the optional positions.

Header Data Article List Calculation	Report		
Templates	•	I□ Q, ∧ ∨ 2 1 von 2 - + 240 % ∨	<u>2</u> T & E 🖲 🖻
Quote	~		
View		Net Total	USD 11,494.91
Summarized	~	Total of optional positions	USD 1,665.20
Header	<u>ب</u>	Net total including optional positions	USD 13,160.11
Prices	~	Combined Sales Tax (0%)	USD 0.00
Pricing Details		Total Price	USD 11,494.91
Sub Totals		Total price incl. optional positions	USD 13,160.11
Set Article Part Prices			
Header Discounts / Upcharges			
Header Discount Percentages			
Taxes			
Total Prices incl. Optional Positions			
Footer	~		
Page Breaks	~		
📲 Page Break 🖋 Edit 🔲 Delete			

Image 8: Total price including optional positions

Edition: Pro / Integration

3.2.2 Handling of External Item Number

The option to display the external item number has been extended to make the following options available:

- Hide: the external item number is not displayed
- Show: the external item number is displayed next to the original item number
- Replace Position Number: the external item number replaces the original item number

Edition: Pro / Integration

3.2.3 Header Discount Percentages

The new option Header Discount Percentages is used to define whether the percentage value should be displayed for the percentage header conditions or only the resulting absolute value of the condition.

Prices	^
Pricing Details	
Variant Prices	
Sub Totals	
500 101013	
Set Article Part Prices	
Header Discounts / Upcharges	
Header Discount Percentages	
Taxes	
Total Prices incl. Optional Positions	

Image 9: Header Discount Percentages

Edition: Pro / CE / Integration



4 Enhancements of the OEX Export

4.1 Contact Search in OEX Dialog

The OEX export dialog does now contain the Office365 contact search for every address type.

Order - Export All		
i Order Data	🔍 Search Address 🖌 🗓 Duplicate Address 🖌 🗐 Remove Address	iS
🟠 Main Address	Name / Company / Department * Title	
🕞 Shipping Address		
Billing Address	First Name	
🔛 Supplier Address	Street * Last Name	
🐻 Delivery Options		
	E-Mail	
	P.O. Box Phone	
	Postcode * Mobile	
	City * Fax	
	Country * Website	
	· ·	
	Region	
	District	
	Send Order 🛃 Download Order	Download PDF Cancel

Image 10: Address search in OEX dialog

Edition: Pro



4.2 OEX including OBX

With OEX version 3.1, the OBX for each main position is added to the OEX when the *Attach OBX* option is activated. Thus, the OBX is part of the generated OEX. In versions 2.3 and 3.0, the OBX is still generated in parallel to the OEX.

Order - Export All		Contract Contract Contractory Contrediated Contractory Contrediated Contrediated Cont
i Order Data	GEX Version	 OPARAMENTAL OF CONTRACTORS
🏠 Main Address	Document Type	Origination departments origination origination origination origination origination
Shipping Address	Order	V Ordelplan Ordelplan Ordelplan Ordelplan
Billing Address	Order Type Standard	V 00000
Supplier Address	Export Article Images.	cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format cyclic format
📑 Delivery Options	Export Purchase Calculation Attach CBX	construction of additional and a second additional a
	Export Sales Calculation Attach PDI	installations (DeVIC) Constallation (DeVIC) Constallation (DeVIC)
	Quote Data	Context: Langer and Context Context on Conte
	Quote No. N/A	Steam Langer W. 2018 (1998) Annual A Annual Annual Annu
	Order Data	came (approximate) conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver conserver co
	Order E-Mail	 Alexanic Anter State Andrea State State

Image 11: OEX including OBX

Note: Beginning with version 3.1, the OEX export will always be packed as .zip archive, no matter which options are active. This ensures that even large projects can be sent by e-mail.

Edition: Pro / Integration

4.3 Customized Order Templates

As already known from the report forms, customized order forms can now be used for each pCon.login organization. If an individual order form has been released for the pCon.login organization of the registered user, an additional dropdown menu will appear in the order dialog. The "Custom Order" form can be selected here for the ordering process.

3.0 Document Type Document Type Order Billing Address Order Type Standard Supplier Address	~
Main Address Document Type Shipping Address Order Billing Address Order Type Supplier Address FDF Template	~
Shipping Address Order Billing Address Order Type Standard Standard PDF Template PDF Template	~
Billing Address Order Type Standard Supplier Address PDF Template	
Standard Supplier Address PDF Template	
Supplier Address PDF Template	~
Delivery Options	~
Order	
Custom Order ase Calculation	

Image 12: Customized Order Template

Edition: Pro / Integration



5 Article Management

5.1 Images in Custom Catalog

Starting with the autumn release, images for the articles of a custom catalog no longer have to be referenced with a link in the underlying Excel sheet. From now on, images can also be referenced by name. These are the requirements:

- Creation of a folder parallel to the Excel template of the user defined catalog
- Name of the folder: {Name of the Excel file} _Images
 Storage of the images in the folder mentioned above + reference in the Excel template by name.type (e.g. image1.png)

			D	Name ~				۵	Name ~			
				Custom_Cata	log_Images _		-	\sim	BILD1.jpg			
			×	Custom_Cata	log.xlsx				BILD2.jpg			
- U	U	E	F	b	н				J K	L	PI	
1 baseArticleNumber	finalArticleNumber	variantCode	shortText 🗸	longText 🗸	featureText	🖂 pun	chasePrice	🗸 sa	lesPrice 🔽 currency	tax category	eco tax calegor	v 🔽 imageUrl
2 9577B004AA	9577B004AA		Canon iR C1325iF	Seiten pro Minute			1.22	6,67	1538,00 EUR	standard_rate	none	BILD1.jpg
3 1095B001AA	1095B001AA		Originaleinzu	am Dokumente			9	1,00	91,00 EUR	standard_rate	none	BILD2.jpg
4												
						ሰ (CustomC	atalog	9			
							- 4	Cano 9577	18004AA CANON iR C	13xx		
							r.	Büro 1095	drehstuhl B001AA CANON iR C	13xx		

Image 12: Images in the Custom Catalog

You can also add the catalog image in the same way under: *Settings > Custom Catalogs*.

s		Settings						
ral	1	General	+ Add 🔟 Reset All					
2	New Catalog	Quote	Name	File	Image			
bg	Name* ?	Catalog	CustomCatalog	Custom Catalog.xlsx	\	1 III		
uston	CustomCatalog	My Custom Catalogs						
	Filename* ?							
and S	Custom_Catalog.xlsx	Load and Save						
	Picture * ?							
	Bild2.png							
l	Create New Catalog Cancel							
	Ok Ca				Ok	Cancel		

Image 13: Catalog Image for Custom Catalog

Edition: Pro



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