



Service Providers - Unit pricing for products

Planon Software Suite
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Planon
Building Connections

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About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold

Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text

Application names are displayed in italics.

CAPITALS

Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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About Unit pricing for products

In the service provider market, contracts are increasingly being concluded between service providers and their customers in which they agree on a unit price (UP) for a product.

The Planon Service Providers solution > **Unit pricing** can be a useful addition: it ensures that you, as service provider, remain competitive in your market, for both hard and soft services.



By implementing the unit pricing functionality, you create an alternative to the default revenue generation for products / materials, which is based on data from material lines and **Terms for materials**. With unit pricing you can implement *dynamic pricing* ('time-dependent' pricing) and offer *volume discounts*.

In short: Unit pricing does not substitute a contract that includes service agreements related to time (SLAs), labor hour revenues, material revenues, subcontractor revenues, travel revenues, and bonus/malus. Instead, it serves as an enhancement to existing service agreements. Both pricing methods — time/materials and unit pricing — will generate revenues charged to customers, with the significant benefit that they can all be integrated into a single contract.



For information about generating 'material' revenues that take into account the principle of product unit pricing, see Service Providers - Back-office operations > Generating revenues > [Calculating material revenues when product unit pricing applies](#). Also see the relevant field descriptions for: [Revenue estimation lines](#), [Customer quotation lines](#), [Order revenues](#) and the relevant Service Provider field descriptions in Work Orders > [Order lines](#).

Concepts

The following topics describe the concepts that are key to understanding the functionality.

Unit price list

The first step when configuring unit pricing for customer contracts, is to define a 'library' of **Unit price lists** (UPLs). This can be done in the **Unit price lists** TSI. The standard price lists from the library can later be used as a starting point when specific contract price lists need to be created for a customer contract.



A typical use case for having multiple unit price lists in the library, is when you need different generic unit price lists per country or region. But of course there are many more conceivable criteria that can be applied to your library.

Once a UPL is added to the library, you can *link* products and define product unit prices, for each product that may be relevant to your customer contracts. Products on the unit price list may include maintenance materials, spare parts or cleaning agents, but also catering products for example. In any case, the selection of products depends on the type of customers and/or regions you are defining the unit price list for. See [Linked products](#) for more information on the links.

When you are satisfied that a unit price list (and related data) is configured correctly, you can set its status from **In preparation** to **Active**. Unit price lists that are no longer relevant can be **Ended** and subsequently **Archived**.

Benefits: the use of a **Unit price lists** library will facilitate the work of sales and contract managers when they are linking products to a customer contract.



The **Unit price list** is just the starting point for your contract negotiations. Unit price lists can be linked to a customer contract for further customization. The actual product prices that will be agreed for a specific customer contract can therefore deviate from the standard price in the unit price list. These contractually agreed prices are defined by the *contract price lists* and their *linked price list products* and any *product exceptions*.

Linked products

Once you have created a **Unit price list** you can start linking relevant products. These products are available in the **Products** TSI.

The links between the **Unit price list** and the **Products** are *time-aware*. This means that they take the reference date into account and have a clear start date and - optionally - an end date.

Good to know about **Linked products**:

- the links between a single unit price list and its corresponding products cannot overlap in time, nor can they be defined for a period that is outside that of the unit price list.
- during the period defined in the link, the data of any linked products, such as the product price, is kept in sync.

See [Time aware links](#) for general information on the use of time aware links in Planon's Service Providers solution.

Product unit prices

When you have linked product to the unit price list, you can continue adding **Product unit prices**. These are standard prices that can be adjusted over time, by adding a new life cycle.

Good to know about **Product unit prices**:

- Product unit prices are *life cycle aware*.

 The life cycle concept applies to a specific set of business objects within Planon, among which **Contracts**. See the topic [Life cycle](#) to understand how life cycles work for contracts. In the **Unit price lists** TSI, the same principle is applied to product unit prices.

- Product prices for the same product cannot overlap with each other within the linked unit price list. They also have to fall within the period of the unit price list.
- Life cycle data (such as **Price**, **Fixed fee**) can be modified over time. The main reason for creating a different product price (over time) is to change the volumes.
- On the product unit price you will see the applicable product **Unit** (pieces, kilograms, liters etc). You can also specify a **Standard price**, enter the applicable **Tax/VAT**, and indicate whether or not the price is a **Fixed price**. When linking a product to a price list, the initial **Standard price** and **Tax/VAT tariff** will be inherited from the selected product.
- Product unit prices can differ per ordered quantity (on the Order). See [Product volume discounts](#) for more information.

Product volumes

Customers can be granted discounts when they order larger volumes of a product. There are two methods to grant volume discounts within the **Unit pricing** solution. You can either apply a volume discount to the **product price** or apply a **discount percentage**.

Good to know:

- Volumes are 'life cycle aware'. This means that by making changes you automatically create a new version of the volume record that is valid from that point onwards. You cannot make these changes

- directly. You must specifically add a modification for the product volume.
- Only one type of product volume can apply to a product unit price.



If you enter a negative number in the **Price** field, or in the **Discount percentage** field, the customer will receive a surcharge instead of a discount.

Contract price list

After you have completed the configuration of the unit pricing library, you can proceed with configuring unit pricing for *specific contracts* in **Contract price lists**. This basically comes down to creating links between relevant customer contracts, unit price lists and UPL products from the library. After these links are created, you can configure the new contract price list further by defining to which properties the list applies, or by creating product price exceptions for special cases.

The various links to the contract price list will ultimately determine which product prices are applied to a specific customer contract when order revenues are generated, by taking into account the linked products, linked properties and any applicable product price exceptions.



Links with contract price lists are 'time aware'. Make sure that the start and end dates of all the various links to products and properties are fully aligned with one another and that there are no gaps, as this would result in (some) revenues not being generated.

See [Linked contract price list products](#) for more information about product links.

See [Applicability - properties and product prices](#) for more information about applicability.

See [Adding a contract price list](#) to find out how to create contract price lists.

Linked contract price list products

After you have created one or more contract price list(s), you can proceed with linking price list products which are relevant to this / these specific contract price list(s). Any links to these price list products are *time-aware*, which means that their start and end dates must remain within the periods of the linked contract price list and UPL products.



If multiple contract price lists are linked to a customer contract, make sure that any products linked to these price lists do not have conflicting valid periods, due to gaps between their start and end dates, as this may lead to revenues not being generated.

When you link one or more UPL products to a contract price list, their specific 'unit prices' will be applied to the subsequent invoicing process of the contractual work (work orders and PPM orders). The prices are applied to revenue calculations for **Estimation lines**, **Customer quotation lines** and **Material revenue lines**.

Applicability - properties and product prices

In addition to creating a contract price list (by linking a customer contract to a **Unit price list**), you can also configure to which properties the contract price list should apply. This will determine how subsequent product price calculations are processed by the system.

In the **Applicability** field, you can make a setting to either apply the contract price list generically by selecting *all* or to a *specific* set of properties. See [Contract price lists - fields](#) for more information.

By setting the contract price list's applicability to *specific*, the contract price list will exclusively be targeted to the linked properties when calculating product prices for the customer. When it is set to *All*, it applies to all properties that are linked to the contract lines of the contract.

 If multiple contract price lists are linked to a customer contract, make sure that any properties and products linked to these price lists do not have conflicting valid periods, due to overlaps between their start and end dates, as this may ultimately lead to revenues not being generated.

Product exceptions in a contract price list

As an optional, customization to your customer contract price list, you can define exceptions for product prices in the linked contract price list. These are called product exceptions. You can use them to define price reductions that you want to apply to exceptional cases. You can also apply volume discounts to these product exceptions.

Exceptions may consist of various settings, such as:

- Linked properties
- 'Applicability' of the properties
- Setting to invoice the product price exception, or not
- Type of product price exception (price-based or percentage-based)

See [Adding exceptions and volume discounts to a contract price list](#) for the procedure.

See [Product exceptions - fields](#) and [Applicability of product exception](#) for the settings.

 Make sure that any linked properties to the product exceptions do not have conflicting valid periods with the properties linked to the contract price list. Conflicting valid periods are caused by overlapping start and end dates, and they may ultimately lead to revenues not being generated.

Setting up a Product unit pricing library

This section describes the various features that you need to set up a **Product unit pricing** library.

Adding a unit price list and linking products

You can set up a 'library' of unit price lists to prepare standards for product pricing in customer contracts.

Fill your price list library with relevant unit price lists by following this procedure.

Procedure

1. On the navigation panel, select the **Unit price list TSI**.
2. Select the **Unit price lists** selection level.
3. On the action panel, click **Add**.
4. Enter a **Code**, **Name**, **Start date** and optionally an **End date** or **Comments**.
5. **Save**.

The unit price list is created.

6. On the action panel, click **Linked products (UPL)**.
7. In the **Products** dialog, select the **Add links** option and enter a start date for the links.

The links between unit price list and products are time aware. This means that they take the reference date into account and have a clear start date and - optionally - an end date.

8. In the **Linked products (UPL) - Add link(s)** dialog, select the relevant products and add them to the price list by moving them to the **Linked** section.



The **Standard price** and **VAT / tax tariff** are initially copied from the selected product. These values can be adjusted as required.

9. Click **OK**.

When you are done linking products, continue with defining any volume discounts you might want to offer to your customers. Good to know: a unit price list can be copied with all its linked products, properties etc. See [Copying a unit price list](#).

Adding / modifying product unit prices

When you link a product to the price list, an initial product price is created. If you do not want to change this price, proceed with defining any applicable volume discounts. However, if you want to set a different product unit price and end the initial one, use the following procedure.



Product unit prices are life cycle aware. See: [Product unit prices](#).

Procedure

1. In the **Unit price lists** TSI, navigate from the relevant unit price list down to the relevant linked product at **Product details > Linked price list products**.
2. Select the relevant linked product.
3. Go to the **Product unit prices** level.
4. On the action panel, click **Add modification**.
5. On the data panel fill in the relevant fields.

See [Product unit price fields](#) for the field descriptions.

6. Click **Save**.

The product price has a new life cycle with your modifications. You can now proceed with defining any applicable volume discounts.

Defining volumes for discounts

You can either use volumes to apply a discount to the product price or apply a percentage-based volume discount.

With the following procedure you can define volumes to apply discounts to the product unit price of a linked product.

Procedure

1. In the **Unit price lists** TSI, navigate from the relevant unit price list down to the relevant linked product and product unit price.
2. On the action panel, either click **Add Percentage-based volumes** or **Add Price-based volumes**.

See [Product volumes](#) for the difference between the two options.

3. On the data panel fill in the relevant fields.

See [Product volume fields](#) for the field descriptions.

4. Click **Save**.

Copying a unit price list

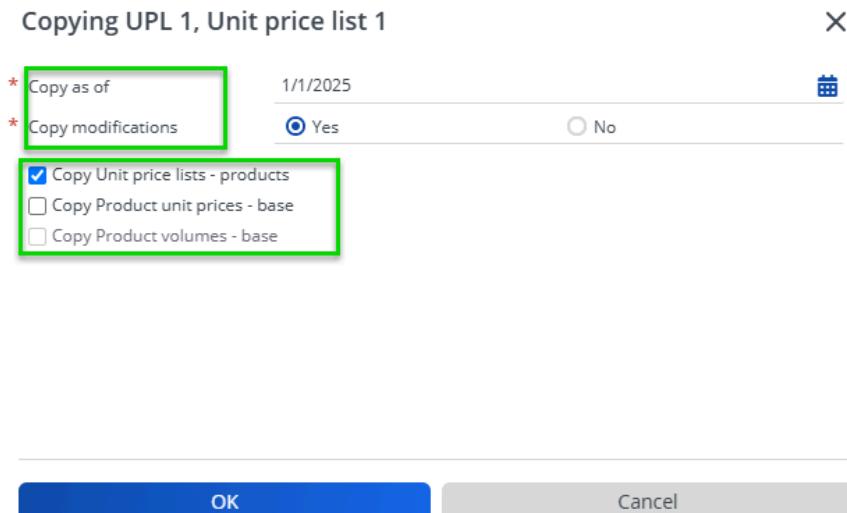
To save time when filling the unit price list library, you can create a deep copy of an existing unit price list with all relevant associated data and adjust the copy further as required.

You can include various optional data in the copy, such as linked products, linked product prices and linked volumes. You can also specify a start date for the copy and indicate if you want to copy any modifications to the unit price list.

Procedure

1. On the navigation panel, select the **Unit price list TSI**.
2. Select the **Unit price lists** selection level.
3. On the action panel, click **Copy**.

The **Copying dialog** is displayed with the various copying options:



4. Select the start date for the copy and indicate if you want to include modifications, linked products, linked product unit prices and / or linked product volumes.
5. Click **OK**.

The copy is created and can be adjusted for further use.

Configuring unit pricing for customer contracts

This section describes the various features that you need to configure product pricing for individual customer contracts.

Adding a contract price list

After you have completed the configuration of the unit pricing library, you can proceed with configuring unit pricing for *specific contracts*: contract price lists.

Procedure

1. In **Customer contracts**, select the relevant customer and contract.
2. Navigate to the **Service contract line** level > **Contract price lists** step.
3. On the action panel, click **Add**.
4. On the data panel, fill in the relevant data.

See [Contract price lists - fields](#), for the field descriptions.

5. Click **Save**.
6. On the action panel click **Link properties**.
7. In the **Link properties** pop-up, select the properties you want to link to the new price list.

You can choose to have the contract price list apply only to the linked properties, by setting the **Applicability** field to **Specific**. See the [Applicability](#) field description for more information.

8. Click **OK**.
9. On the action panel click **Link UPL products**.
10. In the **Link UPL products** pop-up, select the products from the unit price list that you want to link to the new contract price list.
11. Click **OK**.

The links to properties and products are displayed on the **Contract price lists** layout and on the **Service agreements** level.

12. Optional: proceed with adding product exceptions and volume discounts for the contract price list.

When the configuration of the contract price list is complete, set its status to **Active** on the action panel.

Adding exceptions and volume discounts to a contract price list

You can define exceptions to the existing product prices in the linked contract price list.

Procedure

1. In **Customer contracts**, select a relevant customer and contract on the respective selection levels.
2. Navigate to the **Service contract line** level > **Contract price lists** step.
3. Select a relevant contract price list.
4. Navigate to **Service agreements** > **Linked UPL products** and select the linked product for which you want to create an exception.
5. Navigate to **Service terms** > **Product exceptions**.
6. On the action panel, click **Add**.
7. On the data panel fill in the relevant fields.

See [Product exceptions - fields](#), for the field descriptions.

8. Click **Save**.
9. Select **Link properties** on the action panel, to link properties to the product exception.

These linked properties are important when defining the applicability of the product exception in the **Applicability of product exception** field. You can have the product exception apply only to the linked properties, by setting the **Applicability** field to **Specific**. See the [Applicability of product exception](#) field descriptions for more information.

10. If you want to apply volume discounts to the product exception, navigate to **Life cycles** > **Product exceptions - volumes** to either add a volume discount based on product price, or apply a discount percentage. The **Exception type** of the product exception determines which volume discount you can add. The functionality of the fields is the same as that of the Product volume fields fields.

Copying a contract price list

You can create a deep copy of an existing contract price list with all relevant associated data. Next, you can adjust the copy for further use.

You can include various optional data in the copy, such as linked properties, linked products and so on. You can also specify a start date for the copy and indicate if you want to copy any modifications to the contract price list.



Good to know: when you 'deep copy' a customer contract, you can also include a contract price list in this copy.

Procedure

1. On the navigation panel, select the **Customer contracts** TSI.
2. Select the **Contract price lists** selection level.
3. On the action panel, click **Copy**.

The Copying dialog is displayed with the various copying options.

4. Select the start date for the copy and indicate if you want to include modifications.
5. Select the relevant options for copying **Linked properties**, **Linked products (unit price list)**, **Contractual product price exceptions** (with two additional sub-options for their linked properties and volumes).
6. Click **OK**.

The copy of the Contract price list is created and can be further adjusted as required.

Field descriptions - product unit pricing

The following section(s) describe(s) the fields, their purpose and meaning.

Product unit price fields

Field	Description
Actual end date	Displays the end date of the entire Product unit price record.
Actual start date	When initially adding a Product unit price record or when modifying it: select the start date for the entire record.
Code	Displays an auto-generated code.
End date	End date of the life cycle of the product unit price.
Fixed fee	Life cycle aware field. Enter the applicable fee for the product.
Fixed price?	Life cycle aware field. By selecting Yes or No , you can indicate whether the standard price should be fixed or not.
Linked product	Displays the Linked product (M:n link between Unit price list and Product).
Name	Initially displays the product name. You can edit this field.
Previous modification	Reference to the previous life cycle (in time). This field is updated if a life cycle is inserted between two existing life cycles.
Price list product	Read-only reference to the product's code and name within the selected life cycle.
Standard price	Life cycle aware field. The initial Standard price will be inherited from the selected product. Modify the applicable standard price as required. In the Fixed price? field you can indicate whether this price should be fixed.
Start date	Start date of the life cycle of the product unit price.

Field	Description
Unit	Read-only calculated field, displaying the unit of measurement of the linked product.
Tax / VAT tariff	This field initially displays the tax / VAT tariff of the selected product. You can modify the value as required.

Product volume fields

Field	Description
Actual end date	Displays the end date of the entire Product volume record.
Actual start date	Displays the start date of the entire Product volume record.
Code	Enter a code.
Discount percentage	If you add a Percentage-based product volume : enter the relevant discount percentage.
<p> If you enter a negative number in the Discount percentage field, the customer will charged extra, instead of granted a discount.</p>	
End date	Read-only. Displays the end date of the life cycle of the product volume.
Max. quantity	This calculated field is updated by the system. It displays the maximum quantity when the Min. quantity field is cleared or updated.
Min. quantity	Enter the minimum product quantity for the discount to be applied.
Name	Enter a relevant name for the product volume record.
Previous modification	Reference to the previous life cycle (in time). This field is updated if a life cycle is inserted between two existing life cycles.
Price	If you add a Price-based product volume : enter the relevant discounted price.
<p> If you enter a negative number in the Price field, the customer will charged extra, instead of granted a discount.</p>	

Field	Description
Price list product	'Insert-only' reference to the product code and name. After initial insert, the field value becomes read-only.
Start date	Read-only. Start date of the life cycle of the product volume.
Unit	Read-only calculated field, displaying the unit of measurement of the linked product.

Contract price lists - fields

Field	Description
Applicability contract price list	<p>Select a relevant applicability option for the contract price list:</p> <ul style="list-style-type: none"> • All - all properties linked to the contract lines of the contract. The calculation of product prices within the customer contract <i>is not</i> affected by the properties linked to the contract price list. The contract price list is applied to all product price calculations within the contract, when generating revenues. • Specific - the calculation of product prices <i>is</i> affected by the properties linked to the contract price list. The contract price list is applied only to product price calculations for these properties, when generating revenues. <p>i This field is updated by the system if you link / unlink properties to / from the contract price list, because such changes may affect the applicability. You will receive a warning, after which you can take appropriate action.</p>
Code	Enter a code for the contract price list.
Contract	Select the customer contract to which the new contract price list applies. You can only select a contract of the <i>Service contract</i> system type.
End date	Optional: In the date picker, select the date on which the contract price list ends. You can also leave this field blank.
Name	Enter a code for the contract price list.

Field	Description
Start date	Mandatory: In the date picker, select the date on which the contract price list starts.
Unit price list	Select the unit price list on which the new contract price list should be based. You can only select unit price lists with the Active status.

Product exceptions - fields

Field	Description
Actual end date	Optional: In the date picker, select the date on which the Product exception record ends. You can also leave this field blank.
Actual start date	Mandatory: In the date picker, select the date on which the Product exception record starts.
Applicability of product exception	Select a relevant applicability option for the product exception: <ul style="list-style-type: none"> • All - applies to all properties linked to the Contract price list. If the applicability for the contract price list is set to All as well, then this setting applies to all properties linked to the contract lines of the contract. The implication is that the calculation of product prices <i>is not</i> affected by the properties linked to the exception when generating revenues. • Specific - the product exception is applied to the price calculations when generating revenues for the linked properties. Note that this applicability will overrule the applicability of the contract price list for the linked properties.
Code	Enter a code for the product exception.
Comment	Enter a comment about the product exception, as required.



This field is updated by the system if you link / unlink properties to / from the exception, because such changes may affect the applicability. You will receive a warning, after which you can take appropriate action.

Field	Description
Deviating fixed fee	Enter the amount you want to apply as deviating fixed fee.
Deviating VAT tariff / tax rate	Select the VAT tariff / tax rate that must be applied with this product exception.
Discount percentage	If you selected <i>percentage-based</i> as exception type, enter the applicable discount percentage.
Discount price	If you selected <i>price-based</i> as exception type, enter the applicable discount price.
End date	End date of a product exception's life cycle.
Fixed price?	Set this field to Yes if you want to make the price defined in this product exception a fixed price.
Invoiceable?	Set this field to Yes if you want to make the price defined in this product exception invoiceable.
Linked properties	This field shows the properties to which the product exception is linked.
Name	Enter a name for the product exception.
Product exception type	Select how you want to apply the product exception to the product price: Percentage-based or Price based .
Product from contract price list	Select the product from the contract price list to which the product exception must apply.
Start date	Start date of a product exception's life cycle.
Unit	Displays the unit of measurement that applies to the product for which you are making a price exception.

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