Tekla EPM 2019

Set up pricing

April 2019

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1 Set up pricing

The material database used in **Pricing Maintenance** contains a variety of pre-loaded material shapes. However, only the most commonly used shapes are available in **Pricing Maintenance** by default. Missing material shapes should be added to **Pricing Maintenance** in order to combine materials in several Tekla EPM modules. If the required material shapes, grades, sizes, and lengths are not available in **Pricing Maintenance**, Tekla EPM cannot combine materials. We recommend that you set up the **Pricing Maintenance** database as early as possible, so that working in Tekla EPM becomes more seamless.

You can add new shapes, grades, sizes, lengths, and pricing information to the **Pricing Maintenance** database.

Note that you can create and use multiple pricing data sets in Tekla EPM. The pricing data sets are referred to as *supplier warehouses* in Tekla EPM. Despite their name, supplier warehouses can also represent pricing that is for pricing tiers or other purposes. Supplier warehouses they can be labeled in different ways according to their purpose.

Note that the supplier warehouse labeled **Warehouse** is meant for items that need to be purchased, not items that are in the company's warehouse.

You can update the pricing of multiple items by importing pricing information, or by using the **Global Edit** and **Global Edit Form** commands. You can also update pricing while working in the **Purchasing** module, in the **Estimating** module, or while creating pricing forms.

For more information, see the following links:

1.1 Open Pricing Maintenance

In **Pricing Maintenance**, you can add the material sizes and lengths that you want to use when combining materials in Tekla EPM.

1. Click the **Maintenance** ribbon tab.

2. In the menu, select **Pricing Maintenance**.

3. In the **Select Supplier** dialog box, select a pricing warehouse.

4. Double-click the pricing warehouse, or click **Open**.

5. In the **Pricing Maintenance** dialog box, click the **+** signs to expand the options in the navigation tree:

   - Click **+** next to a material shape to view its grades.

   - Click **+** next to a material grade to view its dimensions.

6. Select the material dimension that you want to view or modify.

The properties of the selected material dimension appear on the right side of the dialog box.

You can also see the shape and grade of the material dimension at the upper-left corner, and the latest pricing updates at the upper-left corner.

1.2 Find shapes, grades, and dimensions in Pricing Maintenance

You can use the **Find Shape/Grade/Size** command in the **Pricing Maintenance** dialog box to find a particular material shape, grade, or dimension.

1. In the **Pricing Maintenance** dialog box, click **Find Shape/Grade/Size**.

2. In the **Find** dialog box, do one of the following:

   - Type the name of the material shape, grade, or dimension in the applicable field.

   - Click the arrow on the right side of the applicable field, and select the desired material shape, grade, or dimension in the list.

3. Depending on what you are searching for, click **Find Shape**, **Find Grade**, or **Find Size**.

The shape, grade, or dimension is selected in the navigation tree of the **Pricing Maintenance** dialog box.

1.3 Manage material dimensions in pricing

You can manage material dimensions in the pricing database in several ways: you can add material dimensions either one by one or as groups, copy dimensions from one material grade to another, or remove unnecessary material dimensions from the pricing database.

For more information, see the following links:

Add a single material dimension to pricing (page 6)

Add multiple material dimensions to pricing (page 7)

Copy material dimensions from one grade to another (page 8)

Remove material dimensions from pricing (page 8)

Add, modify, and delete material lengths and pricing information for a dimension (page 9)

Add a single material dimension to pricing

By default, only the most commonly used shapes are available in **Pricing Maintenance**. You can also add new shapes that you need when combining materials in Tekla EPM.

NOTE Only material shapes that are available in the material database can
be added to pricing.

Note that the **Add Sizes** command does not allow adding a selected
dimension. Instead, the **Add Sizes** command adds all the available material
dimensions for the shape. If you want to add a group of material dimensions,
see .

1. At the bottom of the **Pricing Maintenance** dialog box, click **Add**.

    Fields for defining the shape appear in the lower-right corner of the dialog
    box.

2. In the **Shape** list, select the shape whose dimensions you want to add.

3. Click the **Dimensions** field.

    The **Shape** dialog box opens, displaying the available material
    dimensions.

4. Double-click the dimension that you want to add.

5. Ensure that the grade in the **Grade** list is correct. If not, select the correct
    grade in the **Grade** list.

6. Click **Save**.

The shape, grade, and dimension are added to the navigation tree and the
pricing database.

Now, you can add lengths and pricing information for the newly added
dimension. For more information, see
.

Add multiple material dimensions to pricing

By default, only the most commonly used shapes are available in **Pricing
Maintenance**. You can use the **Add Sizes** command to add material
dimensions by groups to the **Pricing Maintenance** database.

NOTE Only material shapes that are available in the material database can
be added to pricing.

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1. In the **Pricing Maintenance** dialog box, click the **Pricing** ribbon tab.

2. In the menu, select **Add Sizes**.

3. In the **Shape** list of the **Sizes** dialog box, select the material shape whose
    dimensions you want to add.

4. In the **Grade** list, select the material grade whose dimensions you want to
    add.

5. Click **Add**.

    The dimensions of the selected shape and grade are added to the **Pricing Maintenance** database and appear in the **Pricing Maintenance** dialog box.

6. Repeat steps 3 to 5 to add more material dimensions.

    For example, to add another set of dimensions of the same shape, but with a different material grade, select another option in the **Grade** list.

Copy material dimensions from one grade to another

Use the **Copy Sizes** command to copy a list of dimensions and their pricing information from one material grade to another.

1. In the **Pricing Maintenance** dialog box, click the **Pricing** ribbon tab.

2. In the menu, select **Copy Sizes**.

3. In the **Shape** list of the **Sizes** dialog box, select the material shape whose dimensions you want to copy.

4. In the **Grade** list, select the material grade whose dimensions you want to copy.

5. In the **New Grade** list, select the material grade to which the dimension will be copied.

6. Click **Copy**.

7. If the new grade already has dimensions in the current supplier warehouse, select if you want to overwrite the existing dimensions or only add dimensions that do not yet exist in the supplier warehouse.

    A message appears, telling you that the selected dimensions of the selected grade have been copied to the new grade.

8. Click **OK** to close the message.

The pricing of the dimensions in the new material grade matches the pricing of the original material grade.

If necessary, update the pricing either item by item or by using the **Global Edit** command. For more information, see Add, modify, and delete material lengths and pricing information for a dimension (page 9) or Modify the pricing of multiple items (page 12).

Remove material dimensions from pricing

You can permanently remove a set of unnecessary material dimensions and their pricing information from the pricing database. Note that the dimensions are not automatically deleted from the material database.

1. In the **Pricing Maintenance** dialog box, click the **Pricing** ribbon tab.

2. In the menu, select **Remove Sizes**.

3. In the **Shape** list of the **Sizes** dialog box, select the shape whose dimensions you want to remove.

4. In the **Grade** list, select the shape whose dimensions you want to remove.

5. Click **Remove**.

6. To permanently remove the dimensions and their pricing information, click **Yes** in the confirmation dialog box.

   A message appears, informing you how many sizes have been removed.

7. To close the message, click **OK**.

The material dimensions and their pricing information are permanently remove from the pricing database.

However, the dimensions and the material grade need to be separately deleted from the material database. For more information, see Delete dimensions and Add, modify, and delete grades.

You can also delete material dimensions one by one by selecting the dimension that you want to delete and clicking **Delete** under the navigation tree of the **Pricing Maintenance** dialog box.

1.4 Modify lengths and pricing

You can add, modify, and delete material lengths and pricing information in two ways: either one dimension at the time, or by selecting multiple grades and dimensions of a shape. If necessary, you can also add special prices for lengths.

For more information, see the following links:

Add, modify, and delete material lengths and pricing information for a dimension

You can add new purchasable material lengths or modify the existing lengths in **Pricing Maintenance**. Ensure that you add all lengths that you need when combining materials in the Tekla EPM modules. When adding lengths, it is important to also define the pricing. Otherwise, Tekla EPM will consider the

material free. You can also delete any unnecessary lengths from the pricing database.

NOTE To make wholesale changes to multiple dimensions by shape, use the **Global Edit** command. For more information, see Modify the pricing of multiple items (page 12).

Add material lengths and pricing information

1. In the navigation tree in the **Pricing Maintenance** dialog box, select a dimension.

   The existing lengths of the dimension appear on the right.

2. Below the existing lengths, click **New**.

3. If only limited quantities of the material dimension are available, type a value in the **Quantity** field.

   Otherwise, leave the **Quantity** field blank.

   If you do not define a quantity, the **Quantity** column for the lengths of the material dimension will show an asterisk (*). This means that Tekla EPM allows an unlimited number of the lengths.

4. In the **Length** field, type the material length.

   For some shapes, you may also need to define the material width.

5. In the **Normal Price** field, type a price for the dimension.

   TIP You can right-click the **Pricing Maintenance** field to change or convert the pricing units and currencies.
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6. If necessary, type a price in the **Special Price** field and click **Save**.

   The price in the **Special Price** field overrides the price in the **Normal Price** field.

7. To determine that the selected dimension is always bought from the current supplier, select the **Always Buy This Size From [Supplier]** check box.

   If you select the **Always Buy This Size From [Supplier]** check box for the material dimension in another supplier warehouse, the **Always Buy This Size From [Supplier]** check box is automatically cleared in the previous supplier warehouse.

8. Click **Add**.

The length and price are added for the selected dimension.

Modify material lengths and pricing information

1. In the navigation tree in the **Pricing Maintenance** dialog box, select a dimension.

   The existing lengths of the dimension appear on the right.

2. Select a length in the list.

3. Modify the length, the quantity, and the pricing properties according to your needs.

4. Click **Edit** to save the changes.

Delete material lengths and pricing information

1. In the navigation tree in the **Pricing Maintenance** dialog box, select a dimension.

   The existing lengths of the dimension appear on the right.

2. Select a length in the list.

3. Click **Delete**.

4. To permanently delete the selected length and its pricing information from the pricing database, click **Yes** in the confirmation dialog box.

Add a special price

If you have selected the **Use Special Price** option for the selected supplier, you can add a special price for a material dimension. Note that the special price overrides the normal price that you have defined for the dimension.

TIP If you want to add the same special price for multiple dimensions at one go, use the **Global Edit** command. For more information, see Modify the pricing of multiple items (page 12).

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1. In the navigation tree in the **Pricing Maintenance** dialog box, select a dimension.

   The existing lengths of the dimension appear on the right.

2. Type a price in the **Special Price** field.

3. Under the length information, click **Edit**.

The special price is saved for the selected material dimension. Note that the special price will be used instead of the normal price until you remove the special price.

Modify the pricing of multiple items

Use the **Global Edit** command to modify pricing, available lengths for linear items and available lengths and widths for nested items, and select whether a material dimension is always bought from a particular supplier.


NOTE When you are using multiple supplier warehouses in **Pricing Maintenance**, you need to maintain the pricing of shapes in each warehouse separately.

The pricing information is used for combining in multiple Tekla EPM modules. You can still combine the items with updated pricing to any inventory or purchase order items, or manually combine the items in a requisition.

If you are combining material items to the specific supplier warehouse and the items in the modules do not match with the items that are available in the supplier's data set, Tekla EPM cannot combine the materials.

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1. In the **Pricing Maintenance** dialog box, click the **Pricing** ribbon tab.

2. In the menu, select **Global Edit**.

3. In the **Shape** list at the top of the **Pricing Global Edit** dialog box, select the shape whose grades and dimensions you want to modify.
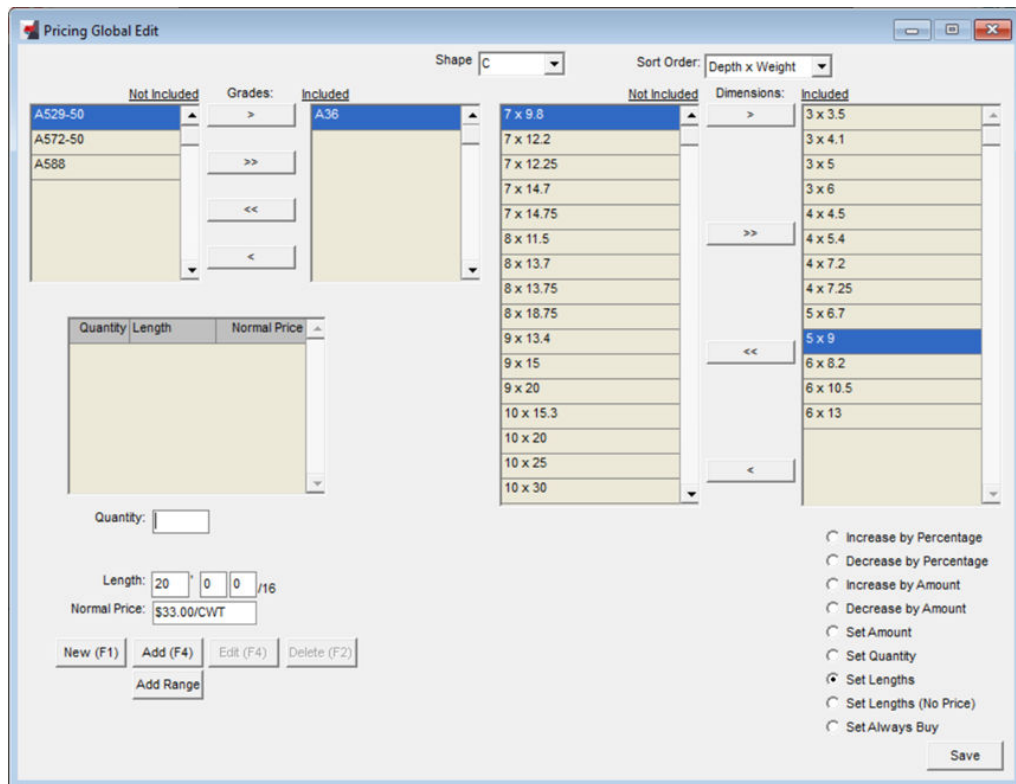
The grades and dimensions of the shape appear in the dialog box.

4. In the **Grades** section, click the arrow buttons to move the grades that you want to modify to the **Included** list.

5. In the **Dimensions** section, click the arrow buttons to move the dimensions that you want to modify to the **Included** list.

6. At the bottom right corner, select an option:

   • **Increase By Percentage**: Increases the prices of the selected items by a specific percentage.

   • **Decrease By Percentage**: Decreases the prices of the selected items by a specific percentage.

   • **Increase By Amount**: Increases the prices of the selected items by a certain sum.

   • **Decrease By Amount**: Decreases the prices of the selected items by a certain sum.

   • **Set Amount**: Sets the prices of the selected items to a specific sum.

   • **Set Quantity**: Allows Tekla EPM to only use a specific number of the selected lengths.

- **Set Lengths**: Allows you to add lengths for the selected items either one by one or as a range.
- **Set Lengths (No Price)**: Allows you to add lengths for the selected items either one by one or as a range. No pricing information is added.
- **Set Always Buy**: Allows you to determine that the selected dimensions are always bought from the current supplier. To do so, select the **Always Buy From [Supplier]** check box.

  If you select the **Always Buy From [Supplier]** check box for the same dimensions in another supplier warehouse, the **Always Buy From [Supplier]** check box is automatically cleared in the previous supplier warehouse.

  New fields appear at the bottom of the dialog box.

7. If only limited quantities of the material dimension are available, type a value in the **Quantity** field.

   Otherwise, leave the **Quantity** field blank.

8. Type a price in the **Normal Price** field.

   TIP You can right-click the **Pricing Maintenance** field to change or convert the pricing units and currencies.
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9. Modify the other properties according to your needs.

10. Click **Save**.

The length and pricing information of the selected items is updated according to the changes you made.

Example: Set lengths

1. Select the **Set Lengths** option.

   A length list appears on the left side of the dialog box.

2. Click **New**.

3. Define the length and the normal price.

4. Click **Add** to add the length and its pricing information to the list.

5. To add multiple lengths with the same interval, click **Add Range**.

6. In the **Add Range** dialog box:

   a. Define the start and end lengths.

   b. Define the interval length.

   c. Click **Add Range**.

7. When you have added all necessary lengths and pricing information, click **Save**.

   The length and pricing of the selected items are updated.

1.5 Create pricing forms

Use the **Global Edit Form** command to use group-specific pricing for different material dimensions. For example, when updating pricing for groups of HSS shapes, the shapes that are either smaller or larger than the commonly used dimensions may need different pricing updates. By creating and using pricing forms, you can update each group of HSS shapes accordingly. You can create one pricing form that contains multiple shapes whose pricing you want to update in the current supplier warehouse, or pricing data set.

Creating pricing forms becomes even more effective when you update the pricing from a requisition or a purchase order, as you can update multiple shapes and dimensions at one go. For more information, see .

1. In the **Pricing Maintenance** dialog box, click the **Pricing** ribbon tab.

2. In the menu, select **Global Edit Form**.

3. At the bottom of the **Global Edit Form** dialog box, click **New Form**.

4. Type a name for the new form and click **OK**.

    The form name appears in the **Description** field at the bottom of the **Global Edit Form** dialog box.

5. Click **New Price**.

6. In the **Shape** list, select a shape.

7. Click the **Start** field and double-click to select the smallest dimension to which the new price applies.

8. Click the **End** field and double-click to select the largest dimension to which the new price applies.

9. In the **Price** field, type the price.

    TIP To change the units for the price, right-click the **Price** field and select a suitable option.

10. To save the changes, click **Save Form**.

Repeat steps 5 to 10 for different dimensions of the selected shape and different shapes. You can see an example pricing form in the following image.

11. When you have created all the necessary forms and prices, click **Perform Global Edit**.

The pricing of the selected items is updated. The pricing forms that you created are saved for later use.

1.6 Create and manage pricing lists

You can view, email, or print the information in a supplier pricing database as a pricing list. You can filter the pricing list by shape to see a list of pricing for all dimensions of the selected shape, or leave the pricing list unfiltered to create a list containing all pricing information.

See also

Create a pricing list

1. In the **Pricing Maintenance** dialog box, click the **Pricing** ribbon tab.

2. In the menu, select **Reports**, or press **Ctrl+R** on the keyboard.

3. If you only want to display selected items in the report, click the **Edit** buttons on the right side of the **Report Filter** dialog box.

   - To only display selected material grades, click the **Edit** button next to **Shape & Grade**.

   - To only display selected material dimensions, click the **Edit** button next to **Shape, Grade, & Size**.

   - If you do not want to filter the pricing list, skip steps 4 and 5.

4. In the **Filter** dialog box, click the arrow buttons to move only the items that you want to include in the pricing list to the **Included** list.

5. Click **OK**.

6. Click **Make Report**.

Tekla EPM creates the pricing list, and the **Report Selection** dialog box opens. Here, you can view, print, or export the pricing list.

View the pricing list

1. In the **Report Selection** dialog box, click **View**.

2. In **Tekla EPM Report Viewer**, do any of the following according to your needs:

To	Do this
Move between pages	• Click the arrows at the top of **Tekla EPM Report Viewer**.
Go to a specific page of the report	• Type the page number in the empty field at the top **Tekla EPM Report Viewer**.
Find a text in the report	a. Click the binocular icon. b. In the blank field, type the text that you want to find.

To	Do this
	c. Click **Find Next**.
	Any matching text is highlighted with a red box.
Zoom in or out	• Click the magnifying glass icon and select the zoom value in the list.

You can also export the report directly from the **Tekla EPM Report Viewer** by clicking the **Export Report** (📤) button.

Print the pricing list

1. In the **Report Selection** dialog box, click **View**.

2. At the top of **Tekla EPM Report Viewer**, click **Print Report**.

3. Select the printer that you want to use.

4. Define the pages that you want to print.

5. If necessary, modify other printer settings.

6. Click **Print**.

Email the pricing list as an Excel worksheet or a PDF file

Note that the **Email Excel** and **Email PDF** commands only allow you to end the pricing list via Microsoft Outlook email. If you use some other email service, you need to export the pricing list and attach it to an email manually. For more information, see Export a pricing list (page 21).

1. In the **Report Selection** dialog box, click **View**.

2. In the upper-right corner of the **Tekla EPM Report Viewer**, click either **Email Excel** or **Email PDF**.

    When the report is ready, the Microsoft Outlook icon appears at the bottom of the screen.

3. Click the icon to open Microsoft Outlook.

4. Modify the email according to your needs.

5. Send the email.

Import a pricing list

You can import a pricing list that has been revised by a supplier or that has user-modified pricing. Pricing lists can be imported either from Microsoft Excel or from an XML file. During the import, Tekla EPM overwrites the current

pricing of the material items in the imported file. The pricing of material items that are not included in the file does not change.

We recommend that you start by exporting the pricing list from Tekla EPM, modifying it, and importing it back to Tekla EPM. By doing so, you can ensure that the format and header information will match the headers in Tekla EPM when you import the modified pricing list back to Tekla EPM.

Note that the format of the pricing list that you import needs to match the pricing format in the pricing list or in the pricing **Pricing Maintenance** dialog box.

Import a pricing list from Microsoft Excel

1. Click the **Maintenance** ribbon tab.

2. In the menu, select **Pricing Maintenance**.

3. In the **Select Supplier** dialog box, click the **Pricing** ribbon tab.

4. In the menu, go to **Import Pricing** --> **Import Pricing From Excel File**.

5. In the **Open** dialog box, browse to find the Microsoft Excel worksheet that contains the pricing list.

6. Select the file and click **Open**.

    Tekla EPM reads the Microsoft Excel worksheet. Once the reading is finished, the **Verify Excel Import Data** dialog box opens.
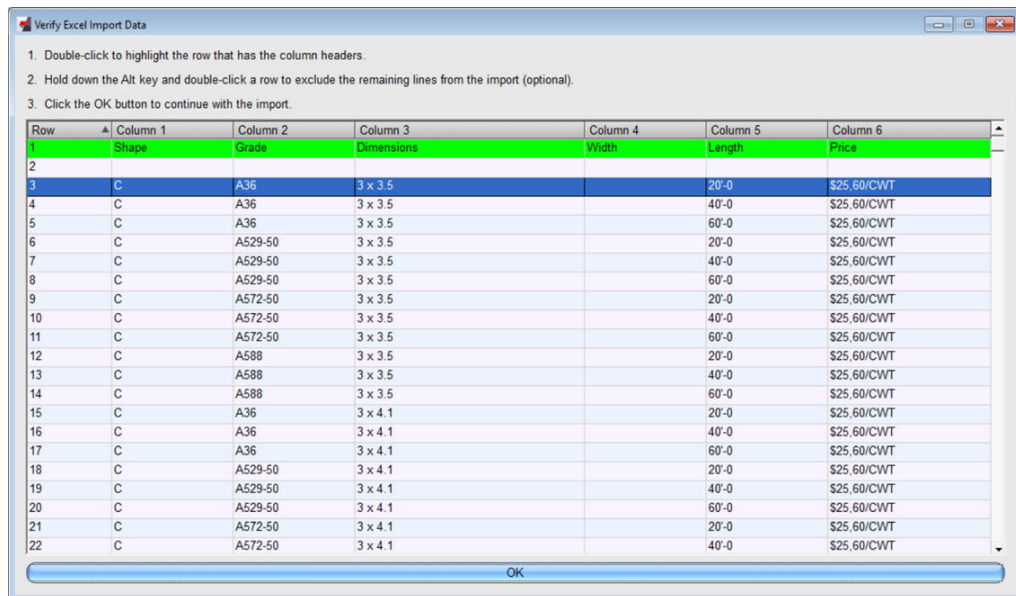
7. Review the items being imported, and click **OK**.

The **Import Field Map** dialog box opens.
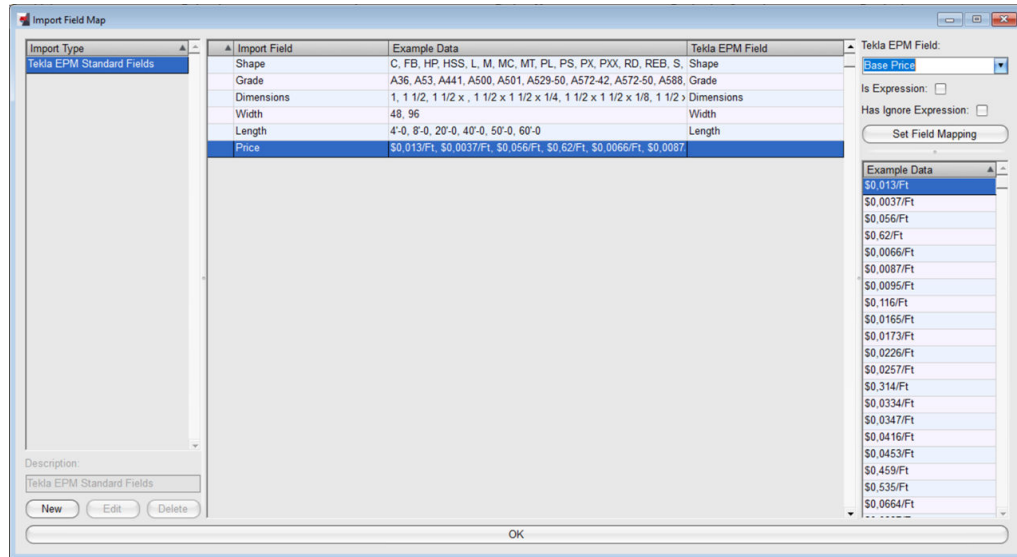
In the **Import Field Map** dialog box, the headings of the Microsoft Excel worksheet need to be mapped to the standard Tekla EPM fields.

8. If the values of an item in the **Import Field** and **Tekla EPM Field** columns are different, do the following:

   a. Select the unmatched **Import Field** value.

   b. On the right side of the dialog box, select a suitable field in the **Tekla EPM Field** list.

   c. Click **Set Field Mapping**.

   Repeat steps a to c for all import fields that are not matched.

9. Click **OK** to continue.

10. In the **Select Supplier** dialog box, select the supplier warehouse for which the new pricing list is imported.

11. Click **Import**.

   The **Import** dialog box opens, and Tekla EPM continues importing the information from the Microsoft Excel worksheet.

   When the import is finished, the **Import** dialog box states that the import is completed. A copy of the import log is automatically saved in the log file location determined in the **Default Directories** dialog box.

12. To close the **Import** dialog box, click the **Close** button (**X**) in the upper-right corner.

Import from an XML file

1. Click the **Maintenance** ribbon tab.

2. In the menu, select **Pricing Maintenance**.

3. In the **Select Supplier** dialog box, click the **Pricing** ribbon tab.

4. In the menu, go to **Import Pricing** --> **From XML File**.

5. In the **Open** dialog box, browse to find the XML file that contains the pricing list.

6. Select the XML file and click **Open**.

7. In the **Select Supplier** dialog box, select the supplier warehouse for which the new pricing list is imported.

8. Click **Import**.

   Tekla EPM imports the items from the XML file. The import process may take some time.

   When the import is finished, the **Import** dialog box states that the import is completed. A copy of the import log is automatically saved in the log file location determined in the **Default Directories** dialog box.

9. To close the **Import** dialog box, click the **Close** button (**X**) in the upper-right corner.

Export a pricing list

You can export the pricing information from Tekla EPM as a pricing list to be viewed and updated. You can save the pricing list as a Microsoft Excel worksheet, an ASCII file, or an XML file.

1. In the **Pricing Maintenance** dialog box, click the **Pricing** ribbon tab.

2. In the menu, go to **Export**.

3. Select the file format in which you want to export pricing.

4. In the **Save As** dialog box, browse to the folder where you want to save the file.

   By default, Tekla EPM saves the file to the **Export** folder.

5. If necessary, modify the file name.

6. Click **Save**.

The pricing list is saved in the location you selected.

See also
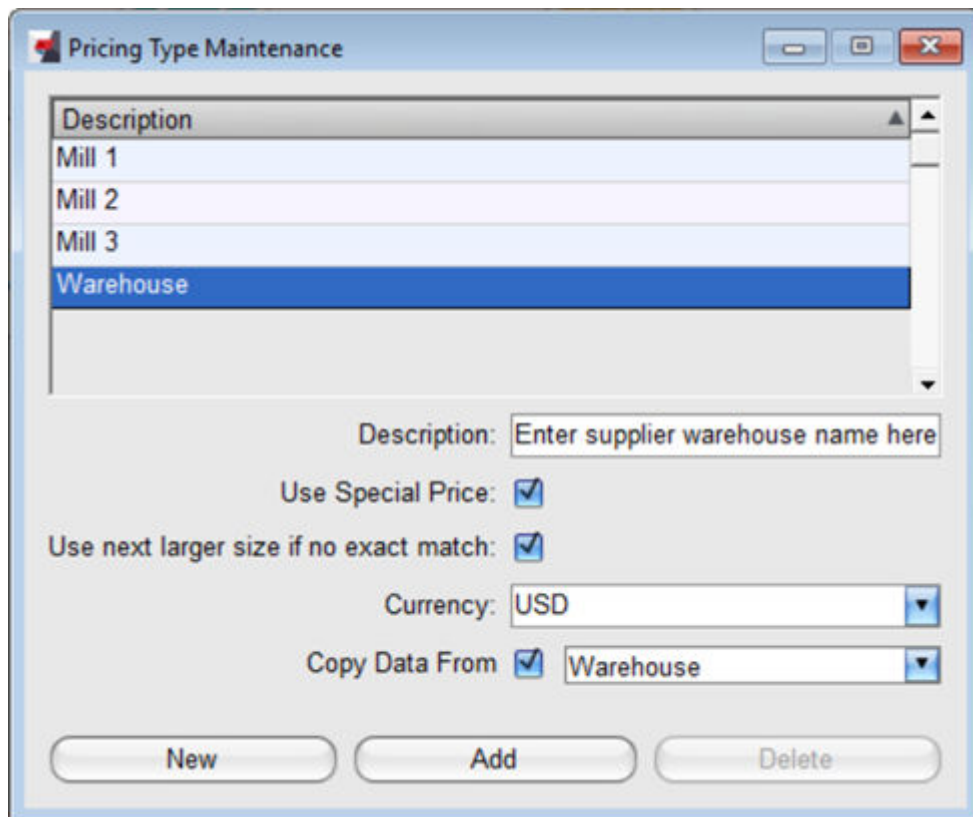
Import a pricing list (page 18)

1.7 Add a supplier warehouse

Use the **Pricing Type Maintenance** command to add a supplier warehouse, or pricing set, to the pricing database.

Note that you can also modify and delete existing supplier warehouses in the **Pricing Type Maintenance** dialog box.

1. Click the **Maintenance** ribbon tab.

2. In the menu, select **Pricing Maintenance**.

3. In the **Select Supplier** dialog box, click the **Pricing** ribbon tab.

4. In the menu, select **Pricing Type Maintenance**.

5. At the bottom of the **Pricing Type Maintenance** dialog box, click **New**.

6. In the **Description** field, type the name of the new supplier.

7. If you want the supplier warehouse to allow adding special prices for material dimensions, select the **Use Special Price** check box.

8. To allow pricing material dimensions in an estimate that do not exist in the selected supplier warehouse, select the **Use next larger size if no exact match** check box.

9. If you are using multiple currencies in Tekla EPM, in the **Currency** list, select the currency that the new supplier warehouse will use.

10. Select the **Copy Data From** check box, and select which existing supplier you want to use as the basis of the new supplier warehouse.

11. Click **Add**.

    The new supplier is added to the list.

12. To close the **Pricing Type Maintenance** dialog box, click the **Close** button (**X**) in the upper-right corner.

The new supplier warehouse is now available in the **Select Supplier** dialog box, and you can modify the pricing of the new supplier warehouse according to your needs.

See also

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