

Product documents (Date 2023-05-02)

Sales-Matrix: pCon.basket 2.9 – Differences between editions

User Inter- face/Work- flow	CE	PRO	Integra- tion
Connection to pCon.login	X	X	
Dashboard	X	X	
Connection to Microsoft Office 365	X	X	
Multi-instance capability	X	X	(X)
Copying articles between instances	X	X	X
Default quote validity		X	X

Open/import files	CE	PRO	Integra- tion
OBK (open)	X	X	
OBX (import)	X	X	X
OBX: quick import from pCon.planner	X	X	X
PEC (import)	X	X	X

Export/Order	CE	PRO	Integra- tion
Microsoft Excel	X	X	X
OBX	X	X	X
OBX – Export of selection		X	X
OBK	X	X	X
OEX (Order)		X	X
OEX – Export of images, sales and purchase dis- counts		X	X
Manufacturer selection for OEX export		X	
Download of CAD models directly at the article	X	X	X

Report	CE	PRO	Integration
Default report templates: quote, article overview without pricing information		X	X
Article list as PDF	X		
Enhanced article list as PDF		X	X
Report structure: detailed, summarized, summarized-compact, compact, flat list	X	X	X
Report in corporate design		X	

Header Data	CE	PRO	Integration
Quote	X	X	X
Contact search with Microsoft Office 365		X	
Customer – General		X	X
Customer – Main address	X	X	X
Customer – Shipping address		X	X
Customer – Billing address		X	X
Centralized management of header and footer texts via pCon.login organization	X	X	X
Person in charge	X	X	X
Terms and conditions			X
Currency and taxes	X	X	X

Article List	CE	PRO	Integration
OFML catalog	X	X	X
Quick insertion via article number	X	X	X
Structural tree	X	X	X
Article list	X	X	X
Properties - Article configuration	X	X	X
Properties – Article texts		X	X
Properties – Article images	X	X	X

Screenshot feature for additional article images	X	X	X
High resolution material preview images	X	X	X
Article information from OFML (Text, prices)	X	X	X
Article information from PIM (Images, videos, documents...)	X	X	X
Internal notes per position	X	X	X
Folder		X	X
User articles		X	X
Custom Catalogs (Connection to Microsoft Office 365)		X	X
Set Articles		X	X
Enhanced article texts		X	X
External position numbers		X	X
Alternative positions		X	X
Optional positions		X	X
Merge articles		X	X
Structure articles (move in structure)	X	X	X

Calculation	CE	PRO	Integration
Article calculation		X	X
Header calculation	X	X	X
Set price date for project and articles	X	X	X
Pre-defined discounts		X	(X)
Header calculation: additional calculation lines for discounts/upcharges	X	X	X
Article calculation: additional calculation lines for discounts/upcharges		X	X
Hidden discounts		X	X
Back-calculation subtotal line to discount/surcharge		X	X
Rounding (header calculation)	X	X	X

Legal remarks

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