BEYOND
PRICECARE

User Guide

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Table of Contents

About BEYOND PriceCare

About this Extension

Beyond PriceCare is an extension for Microsoft Dynamics 365 Business Central.
It was developed by:

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Unlock the power to manage your pricing effortlessly with Beyond PriceCare! Quickly adjust prices and discounts for both items and resources—simplifying your sales and purchasing workflows like never before.

Key Features at a Glance

- **Flexible Price Adjustments**: Update unit prices, discounts, and more directly on the intuitive **Price Adjustment** page.
- **Tailored Pricing**: Set start and end dates, and create customer or vendor-specific pricing for maximum personalization.
- **Effortless Defaults**: Save default values for items and resources, then reload them anytime to save time and reduce errors.
- **Clear and Organized Interface**: See all your changes in one neatly arranged view, ensuring precision and efficiency.

Whether you're managing day-to-day operations or planning strategic campaigns, Beyond PriceCare empowers you to control pricing with speed, simplicity, and confidence.

Take charge of your pricing today with Beyond PriceCare!

The latest version of this documentation can be found at the following link: BEYOND PriceCare Documentation.

The examples described in this documentation represent only a part of the possibilities offered by the BEYOND PriceCare solution. If you have a specific case you would like to address using the solution, feel free to contact us.

> ℹ️ **NOTE**
>
> **Dependencies from or to other apps**
> Additional, basic applications are required to use **Beyond PriceCare**. The following applications are required to use **Beyond PriceCare**:

- BEYOND License: Management of trial and full licenses for apps from BeyondIT.

Version	Date	Autor	Comment
1.0	25.11.2024	Jannic Weidel	Initial Version of the Documentation
Access		public	

Activate New Sales Pricing Experience

This chapter describes how to update the sales price experience if you are using an older version of Business Central and want to use **Beyond PriceCare**.

> ℹ️ **NOTE**
>
> Please note that the function update can only be carried out for Business Central versions (older than version 26.0). This function is automatically activated for versions from version 26.0. If the function update for sales pricing is activated, you cannot undo this. For more information on the new sales pricing, see the standard help for Business Central in the section Extend Price Calculation.

To update the function for a new sales price calculation, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Feature Management** and click on the corresponding search result.
3. The **Feature Management** page is displayed.

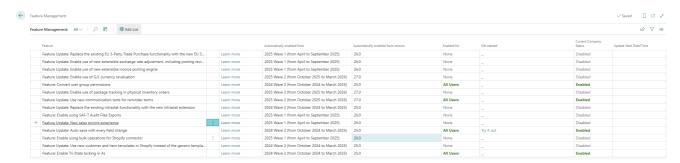
Figure: Feature Management

4. Click on **Edit List** in the menu bar.
5. Click on the value **None** in the **Enabled for** column under the **Feature Update: New Sales Pricing Experience** line.
6. Change the value in the **Enabled for** field to **All Users**.
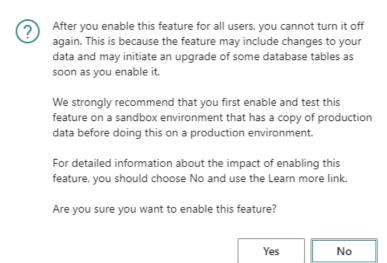7. A dialog box is displayed.

Figure: Dialog for Feature Update

8. To enable the new price calculation feature, click **Yes**.
9. A dialog box is displayed.

Feature Data Update

What is updated

Records from Sales Price, Sales Line Discount, Purchase Price, Purchase Line Discount, Project Item Price, Project G/L Account Price, Project Resource Price, Project Resource Price, Resource Price, and Resource Cost tables will be copied to the Price List Header and Price List Line tables.
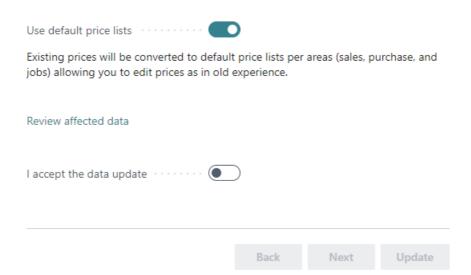
Use default price lists · · · · · · · · · 〇

Existing prices will be converted to default price lists per areas (sales, purchase, and jobs) allowing you to edit prices as in old experience.

Review affected data

I accept the data update · · · · · · · · 〇

Back   Next   Update

Figure: Feature Data Update

10. Check the settings. To review the affected data, click on the **Review affected data** option.
11. Confirm with the **I accept the data update** slider that you are aware that your data records will be converted into price lists.
12. Click **Next**.
13. A dialog box is displayed.

Feature Data Update

The data update task will be running in the current session.

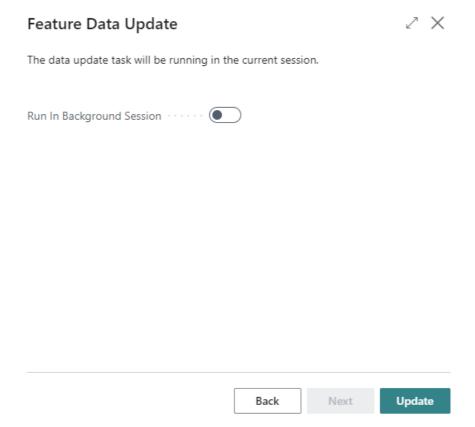Run In Background Session · · · · · · ○

Back   Next   **Update**

Figure: Start Data Update task

14. To start the data update task in the background, activate the **Run in background session** slider.
15. To confirm the process, click on **Update**.
16. When prompted by Business Central, log out of the system and then log back in.

You have performed the feature update **New Sales Pricing Experience** and can now use **Beyond PriceCare** with an older version of Business Central.

Next Chapter

Assign User Permissions

The following description shows how to assign user permissions for the **BEYOND PriceCare** extension. The permission sets provided are:

Permission Set	Description
BYD PCA Reader	This permission set enables the reading of data from the **Beyond PriceCare** extension.
BYD PCA User	This permission set enables the use of the **Beyond PriceCare** extension at user level. In this permission set, the setup is excluded, i.e. the user has access to the functions, but not to the setup of the app.
BYD PCA Admin	This permission set gives the assigned user administrative access to the **Beyond PriceCare** extension.

To assign the permission set for **BEYOND PriceCare** to a user, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Permission Sets** and click on the appropriate search result.
3. The **Permission Sets** page is displayed.
4. Select one of the above permission sets from the list.
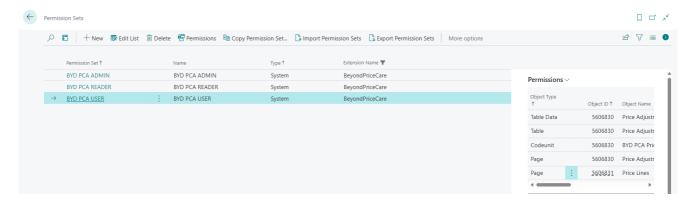5. Click **Related** > **Permissions** > **Permission Set by User** in the menu bar.

Figure: Permission Sets for BEYOND PriceCare

6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondPriceCare** as filter criteria.
8. The list is filtered to the permission sets of **BeyondPriceCare**.
9. Select the check box on the right side of the page for the user or users to whom you want to assign the permission set.

You have assigned a permission set for **BEYOND PriceCare** to a user. Note that users with the **SUPER** permission set have all rights, i.e. you do not need to give this user any additional rights.

Change Price and/or Discount for Item

This chapter describes how you can change the direct unit cost and/or purchase discount as well as the unit price and/or sales discount for an item. This chapter is divided into the following sections:

- Change Direct Unit Cost and/or Purchase Discount for Item
- Change Unit Cost and/or Sales Discount for Item

Change Direct Unit Cost and/or Purchase Discount for Item

This section describes how you can change the direct unit cost/purchase discount for an item.

To change the direct unit cost/purchase discount for an item, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Items** and click on the corresponding search result.
3. The **Items** list is displayed.
4. Open the item card for the item for which you want to change the direct unit cost/purchase discount.
5. Click on the **Prices & Discounts** > **Adjust Price** option in the menu bar.
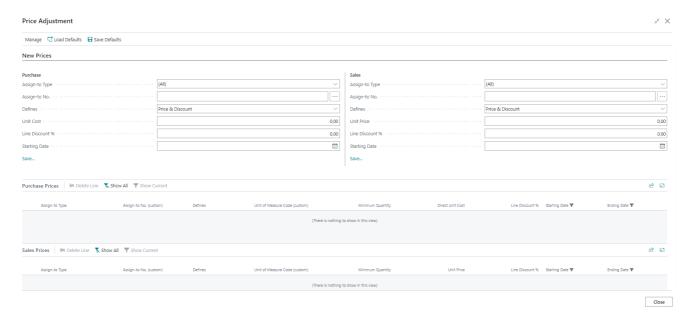6. The **Price Adjustment** window is displayed.

Figure: Price Adjustment

7. **Beyond PriceCare** allows you to change both the direct unit cost and the purchase discount. The **Purchase** section is displayed on the left-hand side of the screen.
8. Under the **Purchase** section, select between the following values in the **Assign-to Type** field:
   - **All Vendors**: If you select this value, you change the direct unit cost/purchase discount for the item for all vendors.
   - **Vendor**: If you select this value, you can change the direct unit cost for an individual vendor. Please note that you must enter the number of the corresponding vendor in the **Assign-to No.** input field.

9. Choose between the following options under the **Defines** field:
   - **Price & Discount**: Select this value if you want to change the direct unit cost and the purchase discount for the item.
   - **Price**: Select this value if you only want to change the direct unit cost for the item.
   - **Discount**: Select this value if you only want to change the purchase discount for the item.

10. Enter the direct unit cost to be changed in the **Unit Cost** field and/or the percentage of the new purchase line discount in the **Line Discount %** field.
11. Enter a start date from which the changes to the item will take effect.

12. To save the changes, click on the **Save...** option.
13. The changes for the purchase of the item are displayed under the **Purchase Prices** area. If you want to define an end date from which these changes should no longer apply, enter the date under the **End date** column in the line.

You have changed the direct unit cost/purchase discount for the item. You can save the entered data and values as default values for the item by clicking on the **Save Defaults** option in the menu bar. This has the advantage that you can load the entered data directly when you call up the **Price Adjustment** page for this item/resource again using the **Load Defaults** option.

Change Unit Cost and/or Sales Discount for Item

This section describes how you can change the unit price/sales discount for an item.

To change the unit price/sales discount for an item, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Items** and click on the corresponding search result.
3. The **Items** list is displayed.
4. Open the item card for the item for which you want to change the unit cost/sales discount.
5. Click on the **Prices & Discounts** > **Adjust Price** option in the menu bar.
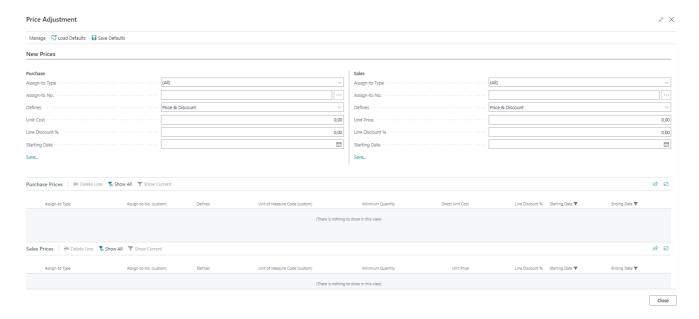6. The **Price Adjustment** window is displayed.

Figure: Price Adjustment

7. **Beyond PriceCare** allows you to change both the unit cost and the sales discount. The **Sales** section is displayed on the right-hand side of the screen.
8. Under the **Sales** section, select between the following values in the **Assign-to Type** field:
   - **All Customers**: If you select this value, you change the unit price/sales discount for the item for all customers.
   - **Customers**: If you select this value, you can change the unit price/sales discount for an individual customer. Please note that you must enter the number of the corresponding customer in the **Assign-to No.** input field.
   - **Customer Price Group**: If you select this value, you change the unit price for the item for a customer price group. Please note that you must enter the number of the corresponding customer price group in the **Assign-to No.** input field.
   - **Customer Disc. Group**: If you select this value, you change the sales discount for the item for a customer discount group. Please note that you must enter the number of the corresponding customer discount group in the **Assign to no.** input field.

9. Choose between the following options under the **Defines** field:
   - **Price & Discount**: Select this value if you want to change the unit cost and the sales discount for the item.

- **Price**: Select this value if you only want to change the unit cost for the item.
- **Discount**: Select this value if you only want to change the sales discount for the item.

10. Enter the unit cost to be changed in the **Unit Price** field and/or the percentage of the new sales line discount in the **Line Discount %** field.
11. Enter a start date from which the changes to the item will take effect.
12. To save the changes, click on the **Save...** option.
13. The changes for the sales of the item are displayed under the **Sales Prices** area. If you want to define an end date from which these changes should no longer apply, enter the date under the **End date** column in the line.

You have changed the unit price/sales discount for the item. In addition to the costs and discounts for an item, you can also change the costs and discounts for a resource.

You can save the entered data and values as default values for the item by clicking on the **Save Defaults** option in the menu bar. This has the advantage that you can load the entered data directly when you call up the **Price Adjustment** page for this item/resource again using the **Load Defaults** option.

Change Price and/or Discount for Resource

Change Price and/or Discount for Resource

This chapter describes how you can change the direct unit cost and/or purchase discount as well as the unit price and/or sales discount for an resource. This chapter is divided into the following sections:

- Change Direct Unit Cost and/or Purchase Discount for resource
- Change Unit Cost and/or Sales Discount for resource

Change Direct Unit Cost and/or Purchase Discount for resource

This section describes how you can change the direct unit cost/purchase discount for an resource.

To change the direct unit cost/purchase discount for an resource, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Resources** and click on the corresponding search result.
3. The **Resources** list is displayed.
4. Open the resource card for the resource for which you want to change the direct unit cost/purchase discount.
5. Click on the **Prices** > **Adjust Price** option in the menu bar.
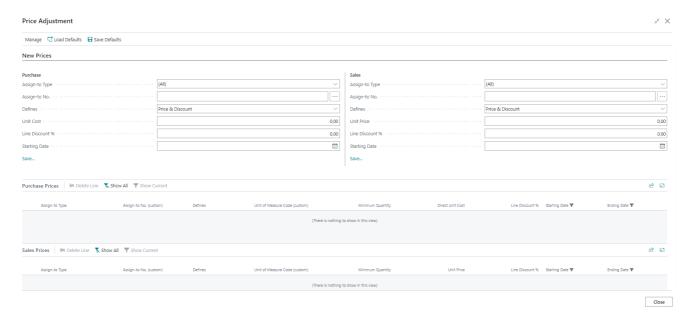6. The **Price Adjustment** window is displayed.

Figure: Price Adjustment

7. **Beyond PriceCare** allows you to change both the direct unit cost and the purchase discount. The **Purchase** section is displayed on the left-hand side of the screen.
8. Under the **Purchase** section, select between the following values in the **Assign-to Type** field:
   - **All Vendors**: If you select this value, you change the direct unit cost/purchase discount for the resource for all vendors.
   - **Vendor**: If you select this value, you can change the direct unit price/purchase discount for a resource for an individual vendor. Please note that you must enter the number of the corresponding vendor in the **Assign-to No.** input field.

9. Choose between the following options under the **Defines** field:
   - **Price & Discount**: Select this value if you want to change the direct unit cost and the purchase discount for the resource.
   - **Price**: Select this value if you only want to change the direct unit cost for the resource.
   - **Discount**: Select this value if you only want to change the purchase discount for the resource.

10. Enter the direct unit cost to be changed in the **Unit Cost** field and/or the percentage of the new purchase line discount in

the **Line Discount %** field.

11. Enter a start date from which the changes to the resource will take effect.
12. To save the changes, click on the **Save...** option.
13. The changes for the purchase of the resource are displayed under the **Purchase Prices** area. If you want to define an end date from which these changes should no longer apply, enter the date under the **End date** column in the line.

You have changed the direct unit cost/purchase discount for the resource. You can save the entered data and values as default values for the resource by clicking on the **Save Defaults** option in the menu bar. This has the advantage that you can load the entered data directly when you call up the **Price Adjustment** page for this resource/resource again using the **Load Defaults** option.

Change Unit Cost and/or Sales Discount for resource

This section describes how you can change the unit price/sales discount for an resource.

To change the unit price/sales discount for an resource, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Resources** and click on the corresponding search result.
3. The **Resources** list is displayed.
4. Open the resource card for the resource for which you want to change the unit cost/sales discount.
5. Click on the **Prices** > **Adjust Price** option in the menu bar.
6. The **Price Adjustment** window is displayed.
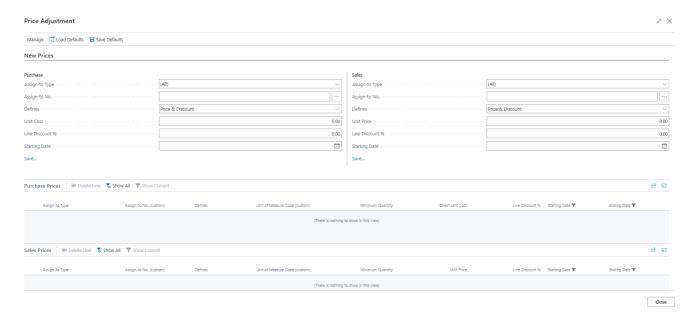

Figure: Price Adjustment

7. **Beyond PriceCare** allows you to change both the unit cost and the sales discount. The **Sales** section is displayed on the right-hand side of the screen.
8. Under the **Sales** section, select between the following values in the **Assign-to Type** field:
   - **All Customers**: If you select this value, you change the unit price/sales discount for the resource for all customers.
   - **Customers**: If you select this value, you can change the unit price/sales discount for a resource for an individual customer. Please note that you must enter the number of the corresponding customer in the **Assign-to No.** input field.
   - **Customer Price Group**: If you select this value, you change the unit price for the resource for a customer price group. Please note that you must enter the number of the corresponding customer price group in the **Assign-to No.** input field.
   - **Customer Disc. Group**: If you select this value, you change the sales discount for the resource for a customer discount group. Please note that you must enter the number of the corresponding customer discount group in the **Assign to no.** input field.

9. Choose between the following options under the **Defines** field:
   - **Price & Discount**: Select this value if you want to change the unit cost and the sales discount for the resource.
   - **Price**: Select this value if you only want to change the unit cost for the resource.
   - **Discount**: Select this value if you only want to change the sales discount for the resource.

10. Enter the unit cost to be changed in the **Unit Price** field and/or the percentage of the new sales line discount in the **Line Discount %** field.
11. Enter a start date from which the changes to the resource will take effect.
12. To save the changes, click on the **Save...** option.
13. The changes for the sales of the resource are displayed under the **Sales Prices** area. If you want to define an end date from which these changes should no longer apply, enter the date under the **End date** column in the line.

You have changed the unit price/sales discount for the resource. In addition to the costs and discounts for an resource, you can also change the costs and discounts for a resource.

You can save the entered data and values as default values for the resource by clicking on the **Save Defaults** option in the menu bar. This has the advantage that you can load the entered data directly when you call up the **Price Adjustment** page for this item/resource again using the **Load Defaults** option.

Change Price and/or Discount for Item

License Management

This chapter describes how you can view the license management of **Beyond PriceCare**.

To view the status of the product license for **Beyond PriceCare**, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Beyond License Management**.
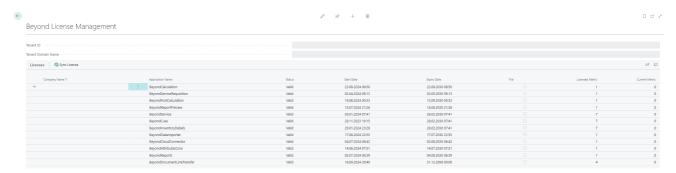2. The **Beyond License Management** page is displayed.

Figure: License Management

3. Under the **Licenses** section, you will find all product licenses for BeyondIT applications that have been installed for this company. You can read all the necessary information from the values in the columns:

Column	Description
Company Name	This column indicates the name of the company.
Application Name	This column indicates the name of the application. If you use several BeyondIT products, a separate line is displayed for each product in the overview,
Status	This is the status of the product license. Several values are possible: **Valid**: The product license is valid and the application can be used without restrictions. **Expired**: The product license has expired. The application can no longer be used. **Trial**: The product license is valid and the functionalities of the application can be used for a short period of time (note the value in the **expiry date** column) with restrictions or without restrictions. **Exceeded**: The product license has expired. The application can no longer be used.
Start Date	This is the date on which the product license was registered.
Expiry Date	This is the date on which the product license becomes or became invalid. The application can no longer be used.
Trial	This checkbox indicates whether the product license is a trial license. Trial licenses are very limited licenses. You can purchase a full product license after the trial license expires (note the value in the **Expiry date** column).
Licensed Metric	This column shows how the application was licensed. For example, this can be a tenant license, a license per company or a license per user.
Current Metric	This column shows how many licenses are used in the environment. The difference between the values in the **Licensed metric** and **Current metric** columns indicates whether you need to purchase an additional license.