



# BEYOND PRICECHANGES

## User Guide



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# About BEYOND PriceChanges

## About this Extension

BEYOND PriceChanges is an extension for Microsoft Dynamics 365 Business Central.  
It was developed by:


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Beyond PriceChanges allows you to define individual markups for items based on item quantities, item prices and customers. Markups can be applied as a percentage markup, fixed price, or blended markup in sales and service documents.

The latest version of this documentation can be found at the following link: [BEYOND PriceChanges Documentation](#).

The examples described in this documentation represent only a part of the possibilities that the BEYOND PriceChanges solution offers you. If you have a specific case that you would like to map via the solution, please feel free to contact us.

 NOTE

**No dependencies from or to other apps**

No dependent applications are required to use BEYOND PriceChanges, i.e. you do not need to install any additional applications.

Version	Date	Author	Comment
1.0	05.10.2023	Jannic Weidel	Initial version of the documentation
1.1	20.02.2024	Jannic Weidel	Added description of the factbox area
1.2	07.10.2024	Jannic Weidel	Added description of a new "Copy Markup" feature
Access		public	

[Continue with the next chapter](#)

# Setup Beyond PriceChanges

This chapter describes how to set up Beyond PriceChanges.  
The contents of this chapter are divided into the following sections:

- Markup Setup

## Markup Setup

This section describes how to set up markups.  
To set up the markups, proceed as follows:

1. Open the search from the role center (**ALT+Q**).
2. Search for **Price Setup** and click on the appropriate search result.
3. The **Price Setup** page is displayed.

←

✓ Saved

Price Setup

General

Price Type

Amount Rounding Pr...

Rounding Method Co...

Price List Code

Beautify Price

Customer No.

4. From the available options for the **Price Type** field, select the way you want to apply markups to prices. The following options are available:
  - **Absolute**: Use this price type if you want to use a fixed amount for the markup.
  - **Percent**: Use this price type if you want to use a percentage amount for the markup calculated from the item price.
  - **Mixed**: Use this price type if you want to use a mixed amount for the markup. After selecting this option, an additional field (**Price mechanism**) id displayed, which will be used for configuration.
5. In the **Rounding Method** field, specify a method that will be used to round the amounts.
6. If you want to "beautify" the prices, activate the **Beautify Price** slider. Instead of round amounts, the applied prices are lowered with this setting, i.e. beautified from, for example, 12.00 USD to 11.99 USD.
7. In the **Amount Rounding Precision** field, specify a value which is applied to round the amounts.
8. In the **Price List Code** field, specify a price list to be used for markups.
9. Specify a customer in the **Customer number** field.

←

✓ Saved

Price Setup

General

Price Type

Percent

Amount Rounding Pr...

0.01

Rounding Method Co...

TEN

Price List Code

DEFAULTCUSTOMERS

Beautify Price

Customer No.

10000

You have completed the price setup. Next you need to [Create a Markup List](#).

# Create Markup List

This section describes how to create a markup list.

To create a markup list, proceed as follows:

- 1. Open the search function from the role center (**ALT+Q**).
- 2. Search for **Markup List** and click on the appropriate search result.
- 3. The **Markup List** page is displayed.

←

Markup List

🔍

📄

🔗

🔍 Search

+ New

Manage

🔗

🔍

☰

Code ↑

Description

Customer Filter

Item Filter

Status

(There is nothing to show in this view)

- 4. Click **New** in the menu bar.
- 5. A new **Markup Card** is displayed.

←

📄

🔗

+

🗑

📄

🔗

Markup Card

General

Code ..... \*

Description ..... \*

Status .....

Draft

▼

Type .....

Percent

Customer Filter .....

VERSION(1) SORTING(No.)

Filtered Customers .....

69

Total Customers .....

69

Item Filter .....

VERSION(1) SORTING(No.)

Filtered Items .....

182

Total Items .....

182

Lines

🔗

🗑

🔗

🗑

Quantity Group Code ↑

Price Group Code ↑

Value

Description

→ \*

Matrix

🔗

🗑

Description

→ maximum

⋮

- 6. In the **Code** field, enter a code for the markup you want to configure.

7. Enter an appropriate name for the markup in the **Description** field.
8. Leave the **Status** field set to **Draft** for now. With this setting you activate the configured markup.
9. The value in the **Type** field is determined by the **Price Setup** page.
10. Click in the **Customer Filter** field to use the filter to specify customers to which this markup should be applied.
11. The **Filter Page** window is displayed.

## Filter Page



### Filter: Customer

× Customer Price Group ..... \*

× Blocked .....

+ Filter...

Filter totals by:

+ Filter...

OK

Cancel

12. In this window you can limit the number of customers for which the markup configured later will be applied. If you do not make any setting, the markup will be applied to all customers. After setting the filter, return to the markup card.
13. The values in the **Filtered Customers** and **Total Customers** fields show you the exact figures for the customers that are stored in the system and the number of customers for which the markup configured later will be applied.
14. Click in the **Item Filter** field if you want to apply the markup only to specific items.
15. The **Filter Page** window is displayed.

## Filter Page



### Filter: Item

× Vendor No. .... \*

× Blocked ..... No

× Gen. Prod. Posting Group ..... \*

× Item Category Code ..... \*

+ Filter...

Filter totals by:

+ Filter...

OK

Cancel

16. In this window you can limit the number of items to which the markup configured later will be applied. If you do not make any setting, the markup will be applied to all items. After setting the filter, return to the markup card.
17. The values in the **Filtered Items** and **Total Items** fields show you the exact figures for the items that are stored in the

system and the number of items for which the markup configured later will be used.

- Under the **Lines** area, select a quantity group for the **Quantity Group Code** column. You can use the price group later in the markup matrix to define whether a specific markup should be used for a combination of item quantity and item price. When creating the item quantity groups, make sure that you also sell partial quantities for items (for example, 0.5 L oil or other items). The item quantity group always applies from a certain quantity to the next item quantity group.

#### Select - Item Quantity Groups

🔍 ⌵ + New 📄 Edit List ...



Code ↑		Quantity	Description
→	BIGORDER	100,00	from 100
	NORMAL	10,00	from 10 to 99.99
	SMALLORDER	0,01	from 0.01 to 9.99

OK

Cancel

- In the markup card, click in the **Price Group Code** column and create one or more price groups. Using the price group, you can later define in the markup matrix whether a specific markup should be used for a combination of item quantity and item price.

#### Select - Item Price Groups

🔍 ⌵ + New 📄 Edit List ...



Code ↑		Price	Description
→	LOW 5USD	5,00	Item Price lower than 5 USD
	LOW 10USD	10,00	Item Price lower than 10 USD
	LOW 50USD	50,00	Item Price lower than 50 USD
	LOW 100USD	100,00	Item Price lower than 100 USD
	LOW 999USD	999,00	Item Price lower than 999 USD

OK

Cancel

- On the markup card, under the **Lines** area, select a combination of one of the created item quantity groups and one of the created item price groups.
- Enter the value for the combination under the **Value** column. The value is either a percentage value, a fixed amount, or a mix of the two options. This depends on the price setup under the [Set up Beyond PriceChanges](#) section.
- Under the **Matrix** area, the combinations you entered are displayed.
- To use the configured markups in documents, under the **General** tab, in the **Status** field, change the value from **Draft** to **Active**.



## DEFAULTCUSTOMERS

## General

Code .....	DEFAULTCUSTOMERS	Item Filter .....	(Vendor No.=FILTER(*), Blocked=FILTER(false), Gen. Prod. Posting Group=FILT... Item Category Code=FILTER(*))
Description .....	DefaultCustomers		
Status .....	Active		
Type .....	Percent	Filtered Items .....	182
Customer Filter .....	(Customer Price Group=FILTER(... Blocked=FILTER(' '))	Total Items .....	182
Filtered Customers .....	69		
Total Customers .....	69		

Lines				
			New Line	
Quantity Group Code ↑	Price Group Code ↑	Value	Description	
BIGORDER	LOW 100USD	0,30		
BIGORDER	LOW 10USD	0,50		
BIGORDER	LOW 50USD	0,40		
BIGORDER	LOW 5USD	0,60		
BIGORDER	LOW 999USD	0,20		
BIGORDER	MAX	0,10		
NORMAL	LOW 100USD	0,40		
NORMAL	LOW 10USD	0,60		
NORMAL	LOW 50USD	0,50		
NORMAL	LOW 5USD	0,70		
→ NORMAL	LOW 999USD	0,30		

Matrix					
Description		from 0.01 to 9.99	from 10 to 99.99	from 100	
Item Price lower than 5 USD		0,80	0,70	0,60	
Item Price lower than 10 USD		0,70	0,60	0,50	
Item Price lower than 50 USD		0,60	0,50	0,40	
Item Price lower than 100 USD		0,50	0,40	0,30	
Item Price lower than 999 USD		0,40	0,30	0,20	
→ from 999		0,30	0,20	0,10	

After successful setup of **Beyond PriceChanges**, two fields will be added to **Lines** section in sales and service documents. The **Markup** and **Price Description** fields show the applied markup (which is based on item price and item quantity) and the price calculation (including the beautified price).





## 1002 · Spotsmeyer's Furnishings

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## General

No. ....	1002	...	VAT Date .....	10.04.2023
Customer Name .....	Spotsmeyer's Furnishings	...	Order Date .....	10.04.2023
Contact .....	Mr. Mike Nash	...	Due Date .....	30.04.2023
Posting Date .....	10.04.2023		Requested Delivery Date .....	

[Lines](#) | [Manage](#) [Line](#) [Order](#)[New Line](#) [Delete Line](#) [HTML Editor](#) [Show Card](#) [Select items...](#)

Type	No.	Quantity	Unit Price Excl. VAT	Markup %	Price description	Original Price	Line Amount Excl. VAT
Item	1000	10	3,989.99	0.20	x10 (\$3,980,496/Piece + 0.2%) - 15%	3,980.50	33,914.91
Item	1928-S	120	59.99	0.30	x120 (\$54,931/Piece + 0.3%) - 5%	54.93	6,838.86
→ Item	1908-S	5	189.99	0.40	x5 (\$190,069/Piece + 0.4%) - 5%	190.07	902.45

In addition to the new columns in the **Lines** area, additional information is contained in a factbox on the right-hand side of the screen. You can show the factbox area by pressing ALT+F2 if it is not displayed by default. The information under the **Price Information** tab is displayed on sales order cards, service lines and in the service item worksheet.



## 1002 · Spotsmeyer's Furnishings

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## General

No. ....	1002	...	VAT Date .....	10.04.2023
Customer Name .....	Spotsmeyer's Furnishings	...	Order Date .....	10.04.2023
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Type	No.	Quantity	Unit Price Excl. VAT	Markup %	Price description	Original Price	Line Amount Excl. VAT
Item	1000	10	3,989.99	0.20	x10 (\$3,980,496/Piece + 0.2%) - 15%	3,980.50	33,914.91
Item	1928-S	120	59.99	0.30	x120 (\$54,931/Piece + 0.3%) - 5%	54.93	6,838.86
→ Item	1908-S	5	189.99	0.40	x5 (\$190,069/Piece + 0.4%) - 5%	190.07	902.45

[Details](#) [Attachments \(0\)](#)

## Price Information

Description	Spotsmeyer's Furnishings
Vendor No.	30000
Purchase Price	142.00
Original Price	190.07
Surcharge %	0.40
Price excl. VAT	190.00
Beautified excl. VAT	189.99
	1/4

# Copy Markup

This chapter describes how you can copy an existing markup.  
To copy an existing markup, proceed as follows:

- 1. Open the search field (ALT+Q) and search for the page **Markup List**.
- 2. The **Markup List** page is displayed.
- 3. Select the markup you wish to copy from the list.
- 4. Click on the **Copy Markup** action in the menu bar.
- 5. The **New Code Dialog** window is displayed.

New Code Dialog

Please select a new code for the new record.

New Code .....

OK

Cancel

- 6. Enter a code for the copied markup in the **New Code** input field.
- 7. Click **OK** to copy the markup.
- 8. The markmup card of the copied markup is displayed.
- 9. Enter a description for the copied markup in the **Description** field.

You have copied an existing markup.