



BEYOND PRICECHANGES

User Guide



BEYONDIT GmbH

Schauenburgerstr. 116
24118 Kiel
Germany
+ 49 431 3630 3700
hello@beyondit.gmbh

Table of Contents

About BEYOND PriceChanges

Setup

 Setup Beyond PriceChanges

Features

 Create Markup List

About BEYOND PriceChanges

About this Extension

BEYOND PriceChanges is an extension for Microsoft Dynamics 365 Business Central.

It was developed by:

BEYONDIT GmbH

Schauenburgerstraße 116

24118 Kiel

Germany

moin@beyondit.gmbh

+49 431 3630 3700

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
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.

The screenshot shows the 'Price Setup' configuration page. The 'General' section contains the following fields:

Price Type	[Dropdown]	Amount Rounding Pr...	[Text Input]
Rounding Method Co...	[Dropdown]	Price List Code	[Dropdown]
Beautify Price	<input checked="" type="checkbox"/>	Customer No.	[Dropdown]

Figure: Price Setup

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	<input type="text" value="Percent"/>	Amount Rounding Pr... ..	<input type="text" value="0,01"/>
Rounding Method Co... ..	<input type="text" value="TEN"/>	Price List Code	<input type="text" value="DEFAULTCUSTOMERS"/>
Beautify Price	<input checked="" type="checkbox"/>	Customer No.	<input type="text" value="10000"/>

Figure: Price Setup completed

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.

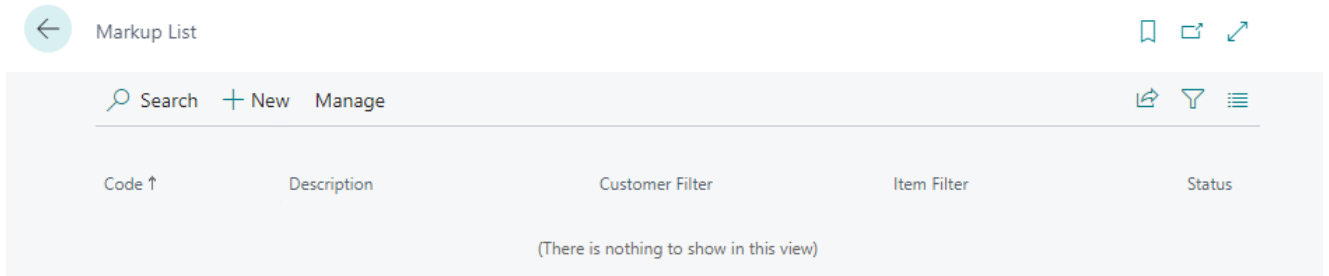


Figure: Markup List

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



Markup Card

General

Code	*	<input type="text"/>	Customer Filter	VERSION(1) SORTING(No.)
Description	*	<input type="text"/>	Filtered Customers	69
Status		Draft <input type="button" value="v"/>	Total Customers	69
Type		Percent	Item Filter	VERSION(1) SORTING(No.)
			Filtered Items	182
			Total Items	182

Lines



New Line



Delete Line



	Quantity Group Code ↑	Price Group Code ↑	Value	Description
→ *		*		

Matrix



	Description					
→	maximum	⋮				

Figure: Markup Card

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

Figure: Filter Page Customer

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

Figure: Filter Page Item

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.

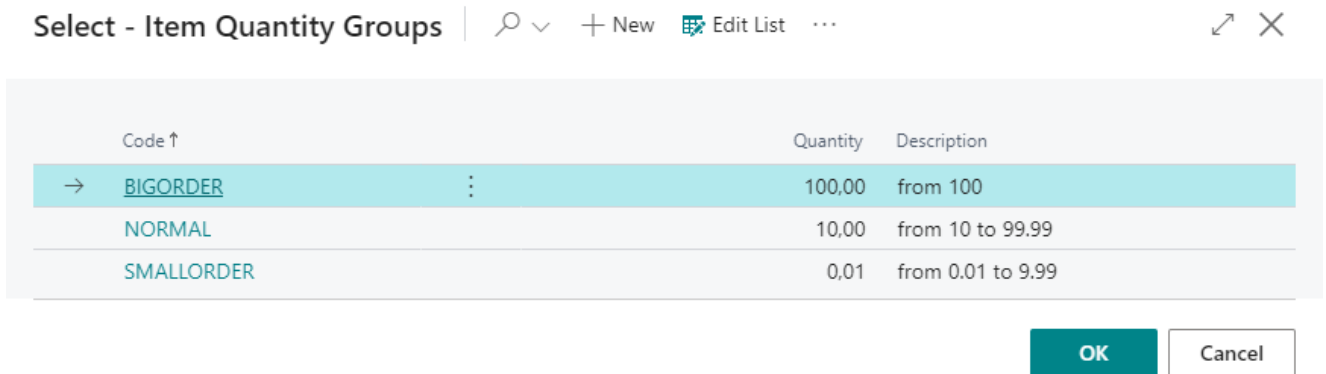


Figure: Create Item Quantity Groups

- 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.

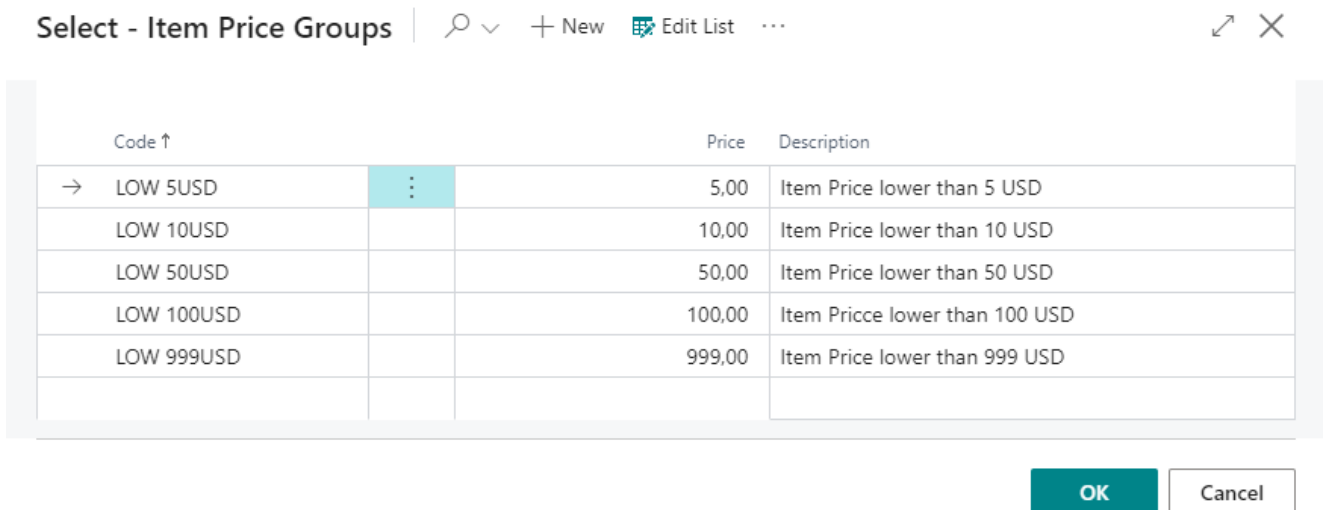


Figure: Item Price Groups

- 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	Filtered Items	182
Status	Active	Total Items	182
Type	Percent		
Customer Filter	(Customer Price Group=FILTER(... Blocked=FILTER(' '))		
Filtered Customers	69		
Total Customers	69		

Lines | New Line Delete 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

Figure: Configured Markups

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).

Sales Order ✎

1002 · Spotsmeyer's Furnishings

[Home](#) | [Prepare](#) | [Print/Send](#) | [Request Approval](#) | [Order](#) | [More options](#)

✎ HTML Editor | ✎ Text Designer | 📄 Post... | 📄 Release | 📦 Create Warehouse Shipment | 📦 Create Inventory Put-away/Pick... | 📄 Archive Document

General

No.	<input type="text" value="1002"/>	VAT Date	<input type="text" value="10.04.2023"/>
Customer Name	<input type="text" value="Spotsmeyer's Furnishings"/>	Order Date	<input type="text" value="10.04.2023"/>
Contact	<input type="text" value="Mr. Mike Nash"/>	Due Date	<input type="text" value="30.04.2023"/>
Posting Date	<input type="text" value="10.04.2023"/>	Requested Delivery Date	<input type="text"/>

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

Figure: Sales Prices and Price Composition in a Sales Order

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.

Sales Order ✎ ✓ Saved

1002 · Spotsmeyer's Furnishings

[Home](#) | [Prepare](#) | [Print/Send](#) | [Request Approval](#) | [Order](#) | [More options](#)

✎ HTML Editor | ✎ Text Designer | 📄 Post... | 📄 Release | 📦 Create Warehouse Shipment | 📦 Create Inventory Put-away/Pick... | 📄 Archive Document

General

No.	<input type="text" value="1002"/>	VAT Date	<input type="text" value="10.04.2023"/>
Customer Name	<input type="text" value="Spotsmeyer's Furnishings"/>	Order Date	<input type="text" value="10.04.2023"/>
Contact	<input type="text" value="Mr. Mike Nash"/>	Due Date	<input type="text" value="30.04.2023"/>
Posting Date	<input type="text" value="10.04.2023"/>	Requested Delivery Date	<input type="text"/>

🔍 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

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

Figure: FactBox Area for Beyond PriceChanges