# BEYOND
## PRICECHANGES

# User Guide

## BEYONDIT GmbH

# Table of Contents

# Preface

This documentation contains information on how to install and operate **Beyond PriceChanges** in your Business Central environment.

This documentation is intended for experienced users of Business Central. Additional knowledge of third-party software products may be required to set up **Beyond PriceChanges**.

Read this documentation in full to set up **Beyond PriceChanges** and work with it professionally. Pay particular attention to the tips, information and safety instructions contained in the documentation. Inform your employees about the proper use of **Beyond PriceChanges** and keep the documentation in a place that is accessible to your employees.

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# Manufacturer

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VISIT APPSOURCE

# Version history

| 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 |
| 1.3 | 12.06.2025 | Jannic Weidel | Added Preface chapter |
| Access | | public | |

# General Information

This documentation contains important information that you must observe when following the descriptions. The information is highlighted as notes and arranged according to type and importance. The notes are listed below in ascending order of importance:

> **ⓘ TIP**
>
> This represents **no risk**. In addition to the classic clicking on options, Business Central also offers the option of using so-called shortcuts. Shortcuts are key combinations with which you can also execute the desired action in the user interface. By using shortcuts, you can work faster and more effectively. Try the key combination and you will be surprised how much faster you can work.

> **ⓘ NOTE**
>
> This represents **no risk**. This note contains important information on the correct use, configuration or operation of the software. Follow these instructions to avoid inefficiencies and unnecessary support tickets. For example, this note can show you that an option is hidden and tells you how to proceed if you want to show it again.

> **☞ IMPORTANT**
>
> This represents a **low risk**. This notice refers to non-critical issues that may lead to undesired behavior or configuration problems. May affect user experience or functionality if not considered.

> **⚠ CAUTION**
>
> This represents a **medium risk**. This notice indicates a potential problem that could affect system stability or data integrity. Failure to comply may result in errors, loss of performance or partial service interruptions. The errors caused by non-compliance only affect the app itself and prevent you from working with data within the app.

> **⚠ WARNING**
>
> This represents a **high risk**. This notice indicates an immediate and serious risk to the productive system. Failure to observe this warning may affect the entire system. There is a risk of loss of critical data or total system failure, leading to prolonged downtime. It may not be possible to restore the data and a backup must be imported.

**Beyond PriceChanges** is an extension for Microsoft Dynamics 365 Business Central.

**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.

> ℹ️ **NOTE**
>
> **No dependencies from or to other apps**
>
> No additional, basic applications are required to use **Beyond PriceChanges**.

# 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.
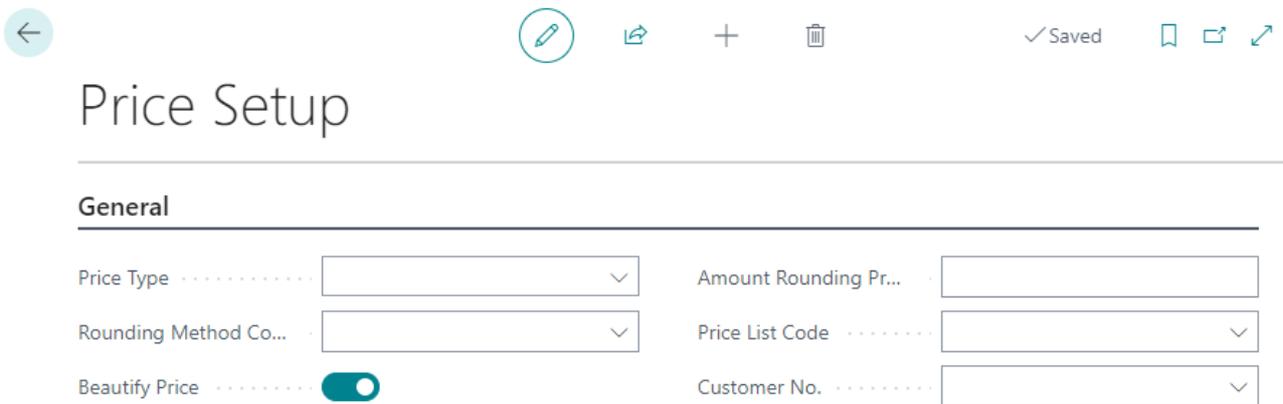


4. From the available options for the **Price Type** field, select the way you want to apply markups to prices. The following options are available:
   - **Absolute**: Use this price type if you want to use a fixed amount for the markup.
   - **Percent**: Use this price type if you want to use a percentage 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.
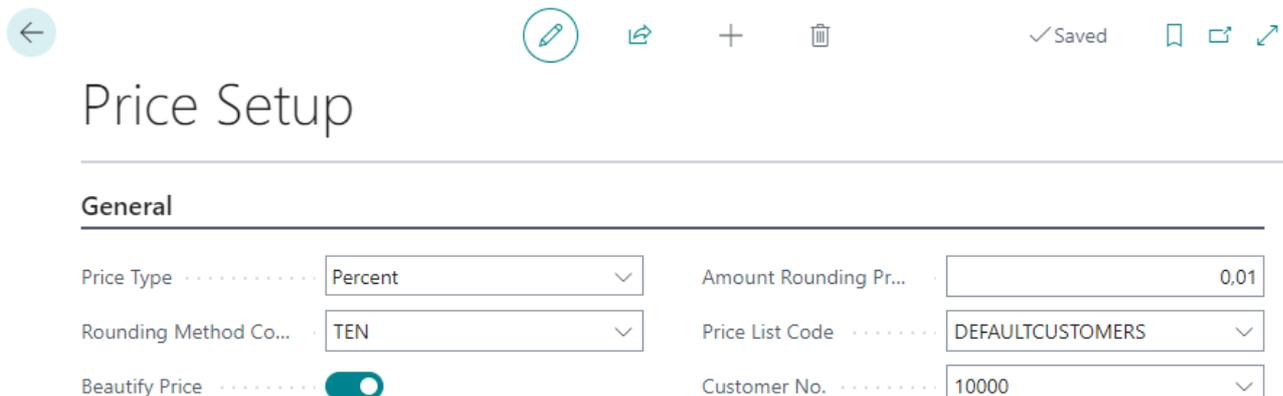


You have completed the price setup. Next you need to Create a Markup List.

# 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.
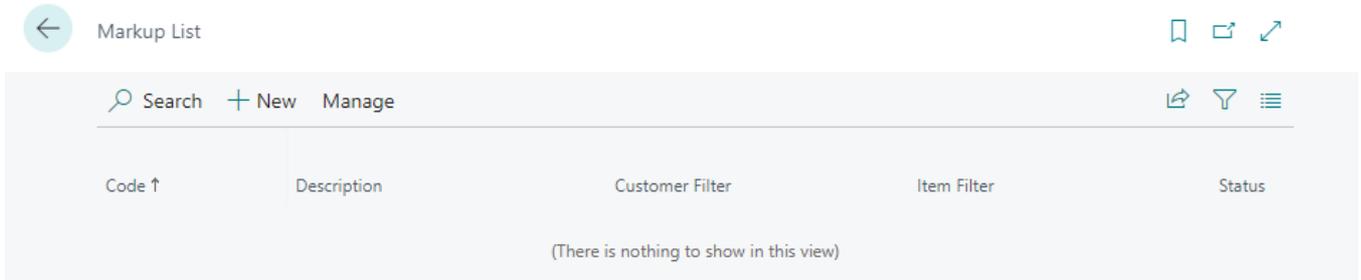


4. Click **New** in the menu bar.
5. A new **Markup Card** is displayed.
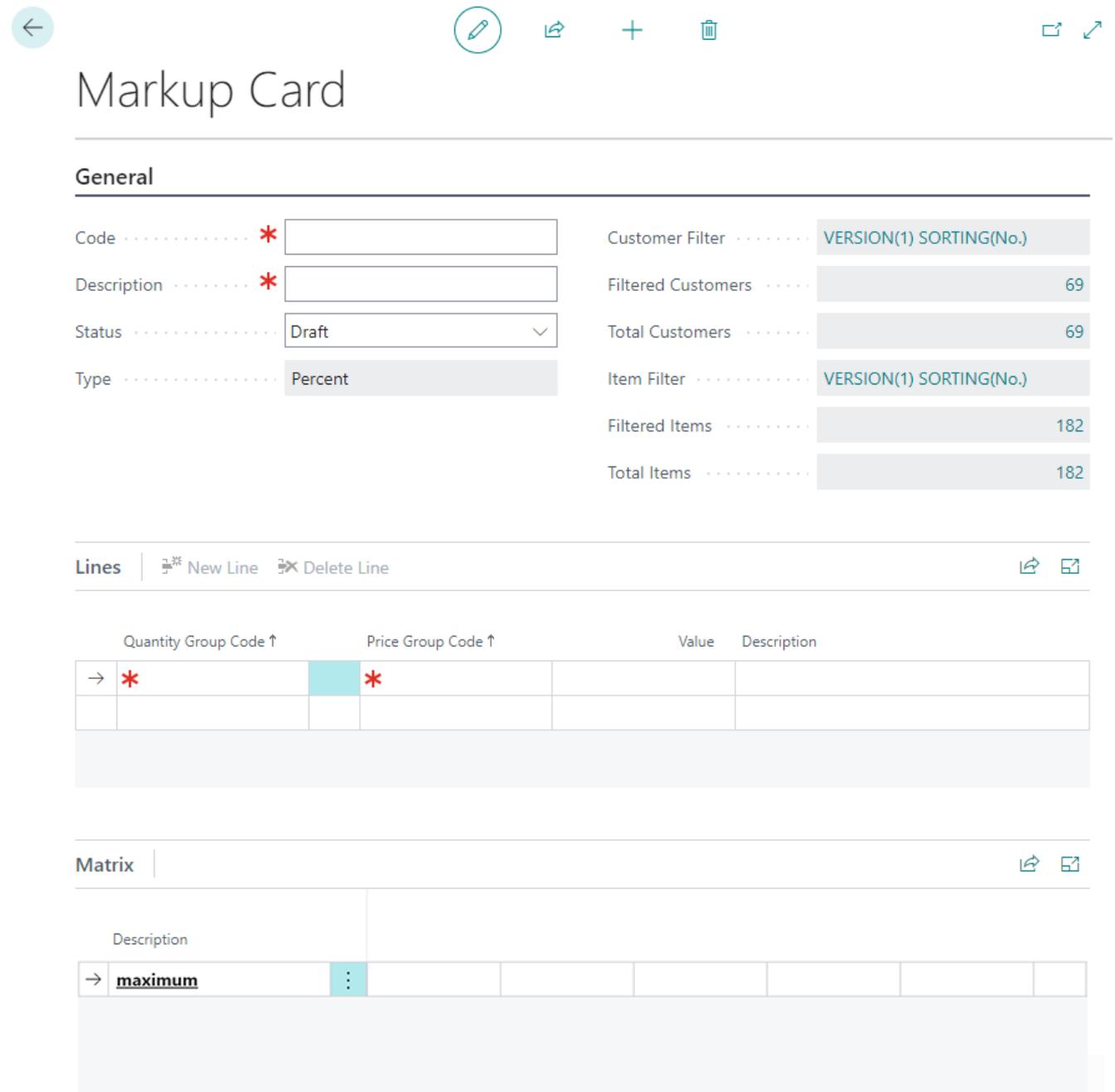


6. In the **Code** field, enter a code for the markup you want to configure.

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.

18. 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.



19. 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.



20. 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.
21. 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.
22. Under the **Matrix** area, the combinations you entered are displayed.
23. 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 ▾ | | Filtered Items · · · · · · · | 182 |
| Type · · · · · · · · | Percent | | Total Items · · · · · · · · · | 182 |
| 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 Pricce 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).

### 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. | 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.



### 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. | 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 |

**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 |

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# 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.