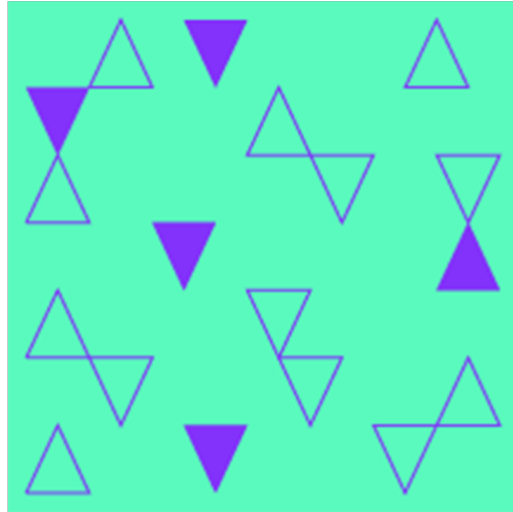
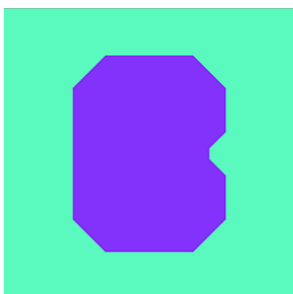




# BEYOND

## Calculation



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# Preface

This documentation contains information on how to install and operate **Beyond Calculation** 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 Calculation**.

Read this documentation in full to set up **Beyond Calculation** 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 Calculation** and keep the documentation in a place that is accessible to your employees.

DOWNLOAD  
PDF

## Manufacturer

**Beyond Calculation** is developed by:

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VISIT  
APPSOURCE

## Version history

| Version | Date       | Author        | Comment                              |
|---------|------------|---------------|--------------------------------------|
| 1.0     | 05.03.2024 | Jannic Weidel | Initial Version of the Documentation |
| 1.1     | 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 Calculation** is an extension for Microsoft Dynamics 365 Business Central.

**Beyond Calculation** enables you to quickly and easily create a calculation of machines/items and corresponding configurations.

Use **Beyond Calculation** to quickly capture the requirements of your customers when configuring a machine. Add attachments, items, costs, services, texts, used machines (trade-in) and other items to the calculation. Display a live preview of the document with all elements of the precalculation. Send the document to the customer or ask your supervisor to approve the precalculation first.

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

The examples described in this documentation represent only a part of the possibilities that the **Beyond Calculation** 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**

**Dependencies on or to other apps**

Additional, basic applications are required to use **Beyond Calculation**. The following applications are required to use **Beyond Calculation**:

- [Beyond License](#): Management of trial and full licenses for apps of BeyondIT.

## License Management

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

To view the status of the product license for **Beyond Calculation**, 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.

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           | <p>This is the status of the product license. Several values are possible:</p> <p><b>Valid:</b> The product license is valid and the application can be used without restrictions.</p> <p><b>Expired:</b> The product license has expired. The application can no longer be used.</p> <p><b>Trial:</b> 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 <b>expiry date</b> column) with restrictions or without restrictions.</p> <p><b>Exceeded:</b> The product license has expired. The application can no longer be used.</p> |
| 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 <b>Expiry date</b> 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 <b>Licensed metric</b> and <b>Current metric</b> columns indicates whether you need to purchase an additional license.                                                                                                                                                                                                                                                                                                                                                                                       |

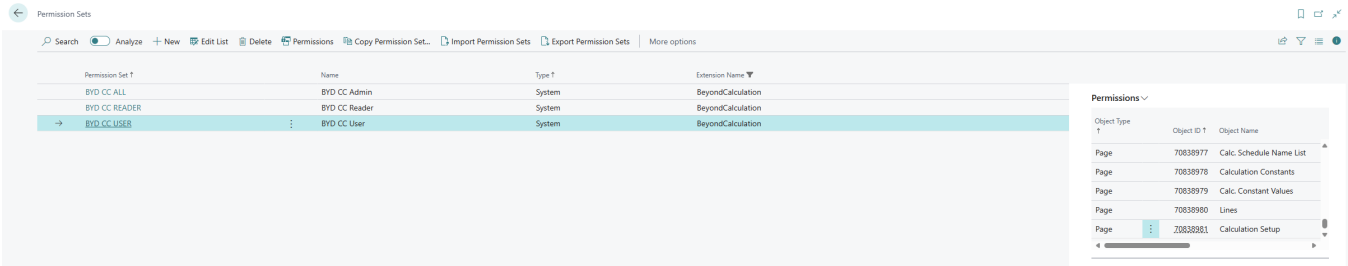
# Assign User Permissions

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

| Permission Set       | Description                                                                                                                                                                                                              |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>BYD CC Reader</b> | This permission set enables the use of the <b>Beyond Calculation</b> extension.                                                                                                                                          |
| <b>BYD CC User</b>   | This permission set enables the use of the <b>Beyond Calculation</b> 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. |
| <b>BYD CC All</b>    | This permission set gives the assigned user administrative access to the <b>Beyond Calculation</b> extension and the associated setup page.                                                                              |

To assign the permission set for **Beyond Calculation** 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.



6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **Beyond Calculation** as filter criteria.
8. The list is filtered to the permission sets of **Beyond Calculation**.
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 Calculation** 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.

# Setup Beyond Calculation

This chapter describes how to set up Beyond Calculation. The setup of Beyond Calculation is divided into the following sections:

- [Setup Calculation Types](#)
- [Create Calculation Number Series](#)
- [Create Calculation Schedule Template](#)
- [Create Postcalculation Number Series](#)
- [Setup Default Item Number for Calculation Lines](#)

## Setup Calculation Types

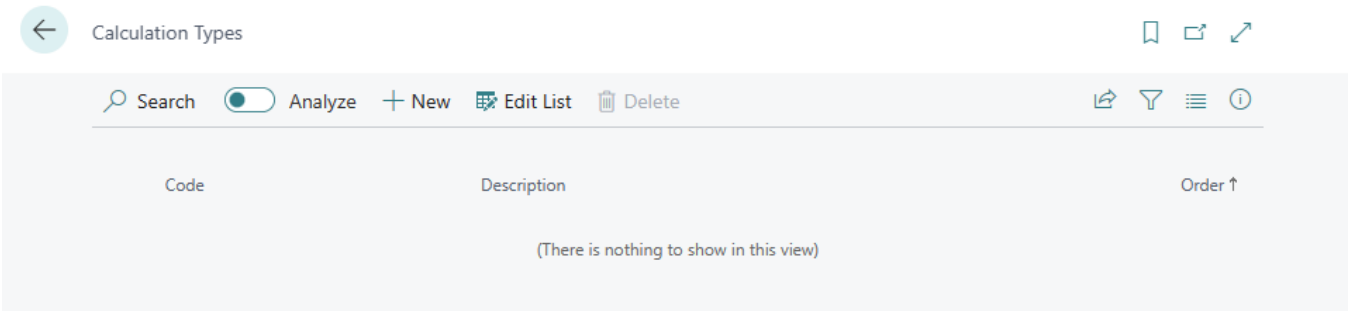
This section describes how to set up and create a calculation type. You can specify a calculation type for individual items in your calculation. You or other users can use the calculation type to identify the individual calculation positions more quickly. In addition, you can define a sequence for the calculation types with which the items in the calculation are automatically sorted. The calculation type is also required for the subsequent calculation in the calculation matrix.

For clarification purposes, this example assumes that a machine calculation consisting of the following calculation positions (and the corresponding calculation types) is created:

- Base Machine
- Special Equipment
- Attachments
- External Services
- Internal Services
- Transportation
- Other Cost
- Road Approval

To create a calculation type, proceed as follows:

1. Open your Business Central.
2. Open the search function from the role center (**ALT+Q**) .
3. Search for **Calculation Types** and click on the corresponding search result.
4. The **Calculation Types** page is displayed.



5. Click on **New** in the menu bar to create a new calculation type.
6. A new line is displayed.
7. Enter a code for the calculation type in the **Code** column.
8. Enter a description for the calculation type in the **Description** column.
9. Enter a numerical value in the **Order** column. The numerical value controls the order in which the options are displayed in the selection of calculation types.



←

Calculation Types

✓ Saved

🔖

📄

↗

🔍 Search

🔵 Analyze

+ New

📋 Edit List

🗑 Delete

🔗

🔍

☰

ℹ

|   | Code              |   | Description                                | Order ↑ |
|---|-------------------|---|--------------------------------------------|---------|
| → | BASE MACHINE      | ⋮ | Configurable basic machine                 | 1       |
|   | SPECIAL EQUIPMENT |   | Special Equipment for base machines        | 2       |
|   | ATTACHMENTS       |   | Attachments (components) for base machines | 3       |
|   | EXTERNAL SERVICES |   | External services for basic machines       | 4       |
|   | INTERNAL SERVICES |   | Internal services for basic machines       | 5       |
|   | TRANSPORTATION    |   | Transportation of the machine              | 6       |
|   | OTHER COST        |   | Other Costs                                | 7       |
|   | ROAD APPROVAL     |   | Cost for road approval                     | 8       |

You have created the calculation types. You can use the calculation types later in calculation schedule to define the totaling.

## Create Calculation Number Series

To set up **Beyond Calculation**, you need to set up the calculation number series. The number series assigns unique codes from a series in order to be able to distinguish the calculation documents from one another.

To set up the calculation number series, proceed as follows:

1. Open your Business Central.
2. Open the search function from the role center (**ALT+Q**) .
3. Search for **Calculation Setup** and click on the corresponding search result.
4. The **Calculation Setup** page is displayed.

←

✎

🔗

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🗑

✓ Saved

🔖

📄

↗

Calculation Setup

⚙ Setup

More options

General

Calculation Nos. ....

Calc. Sched. Template ...

Continuous / Post Cal... ..

Calc. Item No. ....

5. Click in the **Calculation Nos.** field.
6. You can select an existing number series or create a new number series from the dropdown list that is displayed. If you would like to create a new number series, you can find more information on this in the section [How to create a new number series](#).

You have created and assigned a number series for the calculation documents.

## Create Calculation Schedule Template

This chapter describes how to create a calculation schedule template. In the calculation schedule template, you can display the calculation positions that make up your calculation and create a template for a calculation schedule. You also have the option of using formulas and calculation constants for the calculation position in order to calculate items such as overhead costs for individual calculation positions.

To create a calculation schedule template, proceed as follows:

1. Open the **Calculation Setup** page.

✓ Saved

# Calculation Setup

⚙️ Setup

More options

**General**

Calculation Nos. ....

Calc. Sched. Template ...

Continuous / Post Cal... ..

Calc. Item No. ....

2. Click in the **Calc. Sched. Template** field.
3. Select the **New** option in the dropdown menu that is displayed to create a new calculation schedule template.
4. A new calculation schedule template card is displayed.

Select - Calculation Schedule Templates

ⓘ ↗ ✕

**General**

Name ..... \*

Status ..... Open

Description .....

Column Layout .....

Lines

⚙️ New Line ✕ Delete Line

↗ ↗

| Row No. | Totaling Type | Totaling | Description | As Unit Cost             | As Unit Price            | As Calc. Unit Cost       |
|---------|---------------|----------|-------------|--------------------------|--------------------------|--------------------------|
| →       |               |          |             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|         |               |          |             |                          |                          |                          |

OK

Cancel

5. Enter a name for the calculation schedule template in the **Name** field.
6. Enter a description for the calculation schedule template in the **Description** field.
7. Enter the value **STANDARD (Default)** in the **Column Layout** field.
8. You can store the calculation positions in the **Lines** area. For the following description, we assume that in addition to the actual costs for a calculation position (see section **Setup Calculation Types**), overhead costs or a margin should also be included in the calculation.
9. Enter a code for the calculation position in the **Row No.** column.
10. Choose between the following options for the newly created row under the **Totaling Type** column:
  - **Calculation Type Total**: Select this option to create a calculation position using a calculation type for the calculation matrix.
  - **Formula**: Select this option if you want to display or calculate a formula or a constant for display in the calculation matrix.

The following figure shows an example calculation schedule template. The calculation types from the section **Setup Calculation Types** are added (see rows with the value **Calculation Type Total** in the **Calculation**

**Type** field). Margins, overheads and totals of the calculation types for the calculation matrix are calculated using the calculated values (see rows with the value **Formula** in the **Totaling Type** field). Costing constants (here percentage values) are also used.

← Calculation Schedule Templates

MACHINES · Machine Calculation Template

Actions ▾ Related ▾ Automate ▾

Name ..... MACHINES Status ..... Open ▾

Description ..... Machine Calculation Template Column Layout ..... STANDARD ▾

Lines | New Line Delete Line

| Row No.       | Totaling Type          | Totaling             | Description                                | As Unit Cost             | As Unit Price            | As Calc. Unit Cost       |
|---------------|------------------------|----------------------|--------------------------------------------|--------------------------|--------------------------|--------------------------|
| SEP           | Calculation Type Total | SPECIAL EQUIPMENT    | Special Equipment for base machines        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| SEPOV         | Formula                | "SEPOV"              | Special Equipment Overhead Cost            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| SUM           | Formula                | SEP+(SEP*SEPOV/100)  | Sum Special Equipment                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| AT            | Calculation Type Total | ATTACHMENTS          | Attachments (components) for base machines | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ATOV          | Formula                | "ATOV"               | Attachments Overhead Cost                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| SUM           | Formula                | AT+(AT*ATOV/100)     | Sum Attachments                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ES            | Calculation Type Total | EXTERNAL SERVICES    | External services for basic machines       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ESOV          | Formula                | "ESOV"               | External Service Overhead Cost             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| SUM           | Formula                | ES+(ES*ESOV/100)     | Sum External Services                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| IS            | Calculation Type Total | INTERNAL SERVICES    | Internal services for basic machines       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ISOV          | Formula                | "ISOV"               | Internal Services Overhead Cost            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| SUM           | Formula                | IS+(IS*ISOV/100)     | Sum Internal Cost                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| T             | Calculation Type Total | TRANSPORTATION       | Transportation of the machine              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TOV           | Formula                | "TOV"                | Transportation Overhead Cost               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| SUM           | Formula                | T+(T*TOV/100)        | Sum Transportation                         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| OC            | Calculation Type Total | OTHER COST           | Other Costs                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| OCOV          | Formula                | "OCOV"               | Other Cost Overhead Cost                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| SUM           | Formula                | OC+(OC*OCOV/100)     | Sum Other Cost                             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| RA            | Calculation Type Total | ROAD APPROVAL        | Cost for road approval                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| RAOV          | Formula                | "RAOV"               | Road Approval Overhead Cost                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| SUM           | Formula                | RA+(RA*RAOV/100)     | Sum Road Approval                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| TOTAL         | Formula                | SUM                  | Total Sum of Calculation                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| MARGIN        | Formula                | MARGIN               | Margin for total sum                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| → SALES PRICE | Formula                | SUM+(SUM*MARGIN/100) | Sales Price                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

- To create a calculation constant, copy the value from the **Row No.** column for the constant (here, for example, **SEPOV** for overhead costs of the calculation position **SE - Special Equipment**).
- Click on **Related > Calculations > Constants** in the menu bar.

← Calculation Schedule Templates

MACHINES · Machine Calculation Template

Actions ▾ Related ▾ Automate ▾

Name ..... Calculations > Constants

Description ..... Machine Calculation Template

- The **Calculation Constants** page is displayed.
- Under the **Code** column, enter the copied value from the **Row No.** column.
- Enter a description for the constant in the **Description** column.
- To assign a value to the constant, select the corresponding line from the list and click on the **Values** menu option.
- The constants card is displayed.

← SEPOV · Special Equipment Overhead Costs

Calc. Constant Values | Search Analyze New Edit List Delete

| Starting Date ↑ | Value |
|-----------------|-------|
| →               | 0.00  |
|                 |       |

- Under the **Starting Date** column, enter a date from which the constant is to be used.

19. Enter the value for the calculation constant in the **Value** column.
20. Close the card and return to the **Calculation Constants** page.
21. Close the page and return to the **Calculation Schedule Templates** page.
22. As described in the previous steps, define a value and a start date for each constant. In our example, we have used a percentage value for the constants, but you can also add a flat rate to the total. Under the **Sum** values under the **Row No.** column, you can see the formulas for calculating the overhead cost.
23. Create your template and then change the value in the **Status** field under the **General** tab to **Released** in order to be able to use the calculation schedule template.

You have created a calculation schedule template.

## Create Post Calculation Number Series

This section describes how to create and assign a number series for continuous calculations or post calculations.

Proceed as follows to create a number series for continuous calculations or post calculations:

1. Open your Business Central.
2. Open the search function from the role center (**ALT+Q**) .
3. Search for **Calculation Setup** and click on the corresponding search result.
4. The **Calculation Setup** page is displayed.

5. Click in the **Continuous / Post Calculation Nos.** field.
6. You can select an existing number series or create a new number series from the dropdown list that is displayed. If you would like to create a new number series, you can find more information about this in the section [How to create a new number series](#).

You have created and assigned a number series for a continuous calculation or post calculation.

## Setup Default Item Number for Calculation Lines

This section describes how to set up an item number for sales quote lines. The item is required to create a precalculation. You do not need to create a new item for each precalculation, it is sufficient to add the item to your master data once.

Um einen Artikel zu erstellen, der als Platzhalter für die Kalkulation verwendet wird, gehen Sie wie folgt vor:

1. Open your Business Central.
2. Open the search function from the role center (**ALT+Q**) .
3. Search for **Calculation Setup** and click on the corresponding search result.
4. The **Calculation Setup** page is displayed.



✓ Saved



# Calculation Setup

⚙️ Setup

More options

## General

Calculation Nos. ....

Calc. Sched. Template ...

Continuous / Post Cal...

Calc. Item No. ....

5. Click in the **Calc. Item No.** field and select the **New** option from the dropdown menu.
6. A new Item card is displayed.
7. Fill in the mandatory fields on the item card and enter the item number in the **Calc. Item No.** field on the **Calculation Setup** page.

You have stored the item number for sales quote lines in the setup and thus set up **Beyond Calculation**.

[Next Chapter](#)

## Create Precalculation

This chapter describes how to create a precalculation. The precalculation is used to determine a total sales price for one or more items. The price of the individual calculation positions is calculated in the calculation schedule template using the calculation matrix.

To create a precalculation, proceed as follows:

1. Open your Business Central.
2. Open the search function from the role center (**ALT+Q**)
3. Search for **Precalculation List** and click on the corresponding search result.
4. The **Precalculation List** page is displayed.
5. Click on the **New** option in the menu bar to open a new precalculation card.
6. The precalculation card is displayed.

Precalculation

Created Sales Quotes Show Lines Release Send Approval Request Refresh Preview Actions Related Automate Fewer options

**General**

|                     |                            |                             |
|---------------------|----------------------------|-----------------------------|
| Description .....   | Your Reference .....       | Currency Code .....         |
| Description 2 ..... | Document Date .....        | Parameter .....             |
| Customer No. ....   | Quote Valid To Date .....  | Template Item No. ....      |
| Customer Name ..... | Unit of Measure Code ..... | Calc. Sched. Template ..... |
| Contact No. ....    | Salesperson Code .....     | Discount Type .....         |
| Contact Name .....  | Status ..... Open          | Discount ..... 0.00         |
|                     |                            | Pending Approvals ..... 0   |

Show more

**Details** Attachments (0)

**Calculation Details**

Customer No. ...

Ship-to Addresses (0)

Contacts (0)

Sales Quotes 0

Sales

Costs

Gross Profit 0.00%

**Sales History for Customer**

Customer No.

|                                |                                |                         |                               |
|--------------------------------|--------------------------------|-------------------------|-------------------------------|
| Ongoing Sales Quotes 0         | Ongoing Sales Blanket Orders 0 | Ongoing Sales Orders 0  | Ongoing Sales Invoices 0      |
| Ongoing Sales Return Orders 0  | Ongoing Sales Credit Memos 0   | Posted Sales Payments 0 | Posted Sales Invoices 0       |
| Posted Sales Return Receipts 0 | Posted Sales Credit Memos 0    | GP Sales Transactions 0 | GP Receivables Transactions 0 |

7. Enter a description for the precalculation in the **Description** field.
8. Optionally enter a more detailed description for the precalculation in the **Description 2** field.
9. Click in the **Customer No.** field and select the customer for whom you want to create a precalculation. After selecting the customer, the system will add information to several fields. Check the fields filled in by the system.
10. The precalculation preview is displayed at the bottom of the precalculation card.

← Precalculation

Precalculation · CALC-000001

Created Sales Quotes Show Lines Release Send Approval Request Refresh Preview Actions Related Automate Fewer options

**General**

Description CAT Mini Excavator 301.6  
 Description 2 CATERPILLAR Mini Excavator 301.6  
 Customer No. 10000  
 Customer Name Adatum Corporation  
 Contact No. CT000001  
 Contact Name Robert Townes

Your Reference  
 Document Date 4/8/2024  
 Quote Valid To Date  
 Unit of Measure Code PCS  
 Salesperson Code JO  
 Status Open

Currency Code  
 Parameter  
 Template Item No. 1000  
 Calc. Sched. Template MACHINES  
 Discount Type Percentage  
 Discount 0.00  
 Pending Approvals 0

+ Add Item Add Text

Sub-Total 0.00 USD  
 Discount in USD 0  
 Discount 0.00 USD  
 Total without VAT 0.00 USD  
 VAT 0.00 USD  
 Total with VAT 0.00 USD

**BEYONDIT**  
 ZUKUNFTSSICHERE IT-PROJEKTE

ORIONUS USA, Inc., 7122 South Ashford Street, Westminister, Atlanta, GA 31172  
 Adatum Corporation  
 Robert Townes  
 192 Market Square  
 Atlanta, GA 31172  
 USA

Document No. CALC-000001  
 Document Date 2024-05-04  
 Customer No. 10000  
 Salesperson Jim Olive  
 E-Mail JO@contoso.com

**Sales - Quote**

| Pos. No.           | Description | Quantity | Unit of Measure | Unit Price | Line Amount |
|--------------------|-------------|----------|-----------------|------------|-------------|
| Total \$ excl. VAT |             |          |                 |            | 0.00        |
| Total \$ incl. VAT |             |          |                 |            | 0.00        |

Ship-to Address Adatum Corporation, Robert Townes, 192 Market Square, Atlanta, GA 31172, USA  
 Payment Terms 1 Month/2% 8 days

- Complete the information on the precalculation card under the **General** tab.
- To add calculation positions to the precalculation, click on the **Add Item** option.

← Precalculation

Precalculation · CALC-000001

Created Sales Quotes Show Lines Release Send Approval Request Refresh Preview Actions Related Automate Fewer options

**General**

CAT Mini Excavator 301.6 Adatum Corporation Open 1000 MACHINES

+ Add Item Add Text

Title Configurable basic machine  
 Quantity 0  
 Price per Unit 0  
 Selling Price 0.00  
 VAT in % 0  
 Unit Piece  
 Price per Unit 0  
 Purchase Price 0.00  
 Description  
 Save Delete

Sub-Total 0.00 USD  
 Discount in USD 0  
 Discount 0.00 USD  
 Total without VAT 0.00 USD  
 VAT 0.00 USD  
 Total with VAT 0.00 USD

**BEYONDIT**  
 ZUKUNFTSSICHERE IT-PROJEKTE

ORIONUS USA, Inc., 7122 South Ashford Street, Westminister, Atlanta, GA 31172  
 Adatum Corporation  
 Robert Townes  
 192 Market Square  
 Atlanta, GA 31172  
 USA

Document No. CALC-000001  
 Document Date 2024-05-04  
 Customer No. 10000  
 Salesperson Jim Olive  
 E-Mail JO@contoso.com

**Sales - Quote**

| Pos. No.           | Description | Quantity | Unit of Measure | Unit Price | Line Amount |
|--------------------|-------------|----------|-----------------|------------|-------------|
| Total \$ excl. VAT |             |          |                 |            | 0.00        |
| Total \$ incl. VAT |             |          |                 |            | 0.00        |

Ship-to Address Adatum Corporation, Robert Townes, 192 Market Square, Atlanta, GA 31172, USA  
 Payment Terms 1 Month/2% 8 days

- In the **Title** field, enter a description for the item you want to add to the preliminary costing.
- Select one of the configured calculation types from the dropdown menu below. You can define the calculation types yourself; you can find more information on this in the chapter [Setup Calculation Types](#).
- Enter the number of items you want to add to the precalculation in the **Quantity** field.
- Enter the price of the item in the **Price per Unit** fields. It is necessary that you enter at least the unit price for the approximate selling price. You can later use the calculation matrix to calculate the exact selling price including all surcharges such as overheads or the margin. The price per unit for the purchase price is optional and does not have to be maintained.
- Enter the description for the item in your precalculation in the **Description** area.
- Click on **Save** to add the calculation position to your precalculation. The calculation preview is updated

automatically.

Precalculation

Precalculation · CALC-000001

Created Sales Quotes

Show Lines

Release

Send Approval Request

Refresh Preview

Actions

Related

Automate

Fewer options

General

Show more

Description

CAT Mini Excavator 301.6

Your Reference

Currency Code

Description 2

CATERPILLAR Mini Excavator 301.6

Document Date

4/8/2024

Parameter

Customer No.

10000

Quote Valid To Date

Template Item No.

1000

Customer Name

Adatum Corporation

Unit of Measure Code

PCS

Calc. Sched. Template

MACHINES

Contact No.

CT000001

Salesperson Code

JO

Discount Type

Percentage

Contact Name

Robert Townes

Status

Open

Discount

0.00

Pending Approvals

0

+ Add Item

≡ Add Text

CAT Mini Excavator 301.6

Configurable basic machine

Quantity

1.00

Price per Unit

35,000.00

Selling Price

35,000.00

VAT in %

0

Unit

Piece

Price per Unit

35,000.00

Purchase Price

35,000.00

Description

Operating weight:  
- approx. 1,893 kg (depending on equipment)  
Engine:  
- Three-cylinder diesel engine, type CAT C1.1 (water-cooled)  
- Displacement: 1.1 L  
- Power: 16.1 kW / 21.6 hp in accordance with ISO 14396  
- EU emission stage V due to optimized combustion process  
Hydraulic system:  
- Load sensing hydraulics with flow sharing  
- Axial piston variable displacement pump for working equipment, slewing gear and travel drive  
- Hydraulic circuit (AUX1) for hammer or swing bucket (2-way hydraulics)  
- Operation via slider on the right joystick  
- Side articulated boom operation via switchover on the left joystick and side control  
- Electro-hydraulic proportionally controlled working hydraulics  
Upper structure:  
- Internally toothed slewing ring  
- Max. Upper structure speed: 9.8 rpm  
- Automatic slewing brake

Edit

Delete

Sub-Total

35,000.00 USD

Discount in

USD

%

0

Discount

0.00 USD

Total without VAT

35,000.00 USD

VAT

0.00 USD

Total with VAT

35,000.00 USD

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BEYONDIT

ERHÄLTUNGSSYSTEME · PROJECTS

Sales - Quote

| Pos. No. | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Quantity | Unit of Measure | Unit Price | Line Amount |
|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------------|------------|-------------|
| 1 1000   | CAT Mini Excavator 301.6<br>Operating weight:<br>- approx. 1,893 kg (depending on equipment)<br>Engine:<br>- Three-cylinder diesel engine, type CAT C1.1 (water-cooled)<br>- Displacement: 1.1 L<br>- Power: 16.1 kW / 21.6 hp in accordance with ISO 14396<br>- EU emission stage V due to optimized combustion process<br>Hydraulic system:<br>- Load sensing hydraulics with flow sharing<br>- Axial piston variable displacement pump for working equipment, slewing gear and travel drive<br>- Hydraulic circuit (AUX1) for hammer or swing bucket (2-way hydraulics)<br>- Operation via slider on the right joystick<br>- Side articulated boom operation via switchover on the left joystick and side control<br>- Electro-hydraulic proportionally controlled working hydraulics<br>Upper structure:<br>- Internally toothed slewing ring<br>- Max. Upper structure speed: 9.8 rpm<br>- Automatic slewing brake | 1        | Piece           | 35,000.00  | 35,000.00   |

19. Once you have added all the calculation positions, you can use the calculation matrix to see the sales prices for the positions and the exact sales price for the entire precalculation including all overheads, margin and other calculated values. Click on **Related > Matrix** in the menu bar.
20. The calculation matrix you have set up is displayed.

Calc. Schedule Overview Matrix - MACHINES - STANDARD

Search

| Row No.     | Description                 | Totaling             | Totaling Type    | Standard  |
|-------------|-----------------------------|----------------------|------------------|-----------|
| RA          | Cost for road approval      | ROAD APPROVAL        | Calculation T... | 1,620.00  |
| RAOV        | Road Approval Overhead Cost | "RAOV"               | Formula          | -         |
| SUM         | Sum Road Approval           | RA+(RA*RAOV/100)     | Formula          | 1,620.00  |
| TOTAL       | Total Sum of Calculation    | SUM                  | Formula          | 41,970.00 |
| MARGIN      | Margin for total sum        | MARGIN               | Formula          | 8.50      |
| SALES PRICE | Sales Price                 | SUM+(SUM*MARGIN/100) | Formula          | 45,537.45 |

Close

You have created a precalculation.

Next Chapter



# Create Sales Quote from Precalculation

This chapter describes how to create a sales quote from a precalculation. Before you can create a sales quote from a precalculation, you must approve and/or release the precalculation.

To create a sales quote from a precalculation, proceed as follows:

1. Open your Business Central.
2. Open the search function from the role center (**ALT+Q**)
3. Search for **Precalculation List** and click on the corresponding search result.
4. The **Precalculation List** page is displayed.
5. Select the precalculation from the list.
6. The precalculation card is displayed.
7. To create a sales quote from the precalculation, click on **Create Sales Quote** in the menu bar. Please note that you can only create a sales quote from released precalculations.

Precalculation

Precalculation · CALC-000001

Create Sales Quote

Show Lines

Release

Send Approval Request

Create Sales Quote

Created Sales Quotes

Send by Email

Preview

Customer No.

Customer Name

Contact No.

Contact Name

CAT Mini Excavator 301.6

CATERPILLAR Mini Excavator 301.6

10000

Adatum Corporation

CT000001

Robert Townes

8. The lines from the precalculation are transferred to a new sales quote and the sales quote card is displayed.
- You have created a sales quote from a precalculation. You can use the **Created Sales Quotes** button to display the sales quotes that were created with this precalculation.