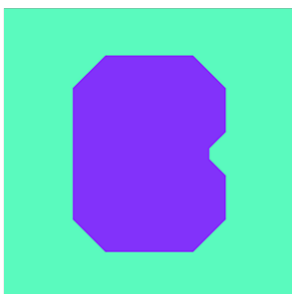




BEYOND

Price Care



BEYONDIT GmbH

Schauenburgerstr. 116
24118 Kiel
Deutschland

+49 431 3630 3700
info@beyondit.gmbh

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Preface

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

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

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Manufacturer

Beyond Price Care is developed by:

BeyondIT GmbH
Schauenburgerstraße 116
24118 Kiel
Germany
info@beyondit.gmbh
[+49 431 3630 3700](tel:+4943136303700)

VISIT
APPSOURCE

Version history

Version	Date	Autor	Comment
1.0	25.11.2024	Jannic Weidel	Initial Version of the Documentation
1.1	25.03.2025	Jannic Weidel	Documentation " Refresh Unit Price " added, Documentation " Refresh Unit Cost " added, Documentation " Setup Price Hints " added
1.2	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 Price Care is an extension for Microsoft Dynamics 365 Business Central.

Unlock the power to manage your pricing effortlessly with **Beyond Price Care**! 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 Price Care** empowers you to control pricing with speed, simplicity, and confidence.

Take charge of your pricing today with **Beyond Price Care**!

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

The examples described in this documentation represent only a part of the possibilities that the **Beyond Price Care** 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 from or to other apps

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

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

License Management

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

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

Beyond License Management

Tenant ID									
Tenant Domain Name									
Licenses Sync License									
Company Name	Application Name	Status	Start Date	Expiry Date	Trial	Licensed Metric	Current Metric		
→	BeyondCalculation	Valid	23.08.2024 08:50	22.09.2030 08:50	☐	1	0		
	BeyondServiceRequest	Valid	02.04.2024 09:13	02.05.2030 09:13	☐	1	0		
	BeyondPostCalculation	Valid	14.08.2024 00:33	13.09.2030 00:33	☐	1	0		
	BeyondReportPreview	Valid	15.07.2024 21:26	14.08.2030 21:26	☐	1	0		
	BeyondService	Valid	30.01.2024 07:41	28.02.2030 07:41	☐	7	0		
	BeyondCues	Valid	29.11.2023 19:15	28.02.2030 07:41	☐	7	0		
	BeyondInventoryDetails	Valid	29.01.2024 23:28	28.02.2030 07:41	☐	7	0		
	BeyondDataImporter	Valid	17.06.2024 22:55	17.07.2030 22:55	☐	1	0		
	BeyondCloudConnector	Valid	04.07.2024 06:42	03.08.2030 06:42	☐	1	0		
	BeyondAttributeCore	Valid	14.06.2024 07:51	14.07.2030 07:51	☐	1	0		
	BeyondReports	Valid	05.07.2024 06:39	04.08.2030 06:39	☐	1	0		
	BeyondDocumentLineTransfer	Valid	18.09.2024 20:40	31.12.2099 00:00	☐	4	0		

- 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.

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 Price Care**.

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.

Feature Management

Feature Management: All ▾ | Edit List

Feature	Learn more	Automatically enabled from	Automatically enabled from version	Enabled for	Get started	Current Company Status	Update Start Date/Time
Feature Update: Replace the existing EU 3-Party Trade Purchase functionality with the new EU 3-Party Trade Purchase functionality	Learn more	2025 Wave 1 (from April to September 2025)	26.0	None	--	Disabled	
Feature Update: Enable use of new extensible exchange rate adjustment, including posting reversal	Learn more	2025 Wave 1 (from April to September 2025)	26.0	None	--	Disabled	
Feature Update: Enable use of new extensible invoice posting engine	Learn more	2025 Wave 1 (from April to September 2025)	26.0	None	--	Disabled	
Feature Update: Enable use of G/L currency revaluation	Learn more	2025 Wave 2 (from October 2025 to March 2026)	27.0	None	--	Disabled	
Feature: Convert user group permissions	Learn more	2024 Wave 2 (from October 2024 to March 2025)	25.0	All Users	--	Enabled	
Feature Update: Enable use of package tracking in physical inventory orders	Learn more	2025 Wave 2 (from October 2025 to March 2026)	27.0	None	--	Disabled	
Feature Update: Use new communication texts for reminder terms	Learn more	2025 Wave 2 (from October 2025 to March 2026)	27.0	All Users	--	Enabled	
Feature Update: Replace the existing IntraStat functionality with the new IntraStat extension	Learn more	2024 Wave 2 (from October 2024 to March 2025)	25.0	None	--	Disabled	
Feature: Enable using SAF-T Audit Files Exports	Learn more	2025 Wave 1 (from April to September 2025)	26.0	None	--	Disabled	
→ Feature Update: New sales pricing experience	Learn more	2025 Wave 1 (from April to September 2025)	26.0	None	--	Disabled	
Feature Update: Auto-save with every field change	Learn more	2024 Wave 2 (from October 2024 to March 2025)	25.0	All Users	Try it out	Enabled	
Feature: Enable using bulk operations for Shopify connector	Learn more	2025 Wave 1 (from April to September 2025)	26.0	None	--	Disabled	
Feature Update: Use new customer and item templates in Shopify instead of the generic templates	Learn more	2024 Wave 2 (from October 2024 to March 2025)	25.0	None	--	Disabled	
Feature: Enable Tri-State locking in AL	Learn more	2024 Wave 2 (from October 2024 to March 2025)	25.0	All Users	--	Enabled	

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.

After you enable this feature for all users, you cannot turn it off again. This is because the feature may include changes to your data and may initiate an upgrade of some database tables as soon as you enable it.

We strongly recommend that you first enable and test this feature on a sandbox environment that has a copy of production data before doing this on a production environment.

For detailed information about the impact of enabling this feature, you should choose No and use the Learn more link.

Are you sure you want to enable this feature?

Yes

No

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 ☒

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 ☐

BackNextUpdate

- 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 ☐

BackNextUpdate

- 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 Price Care** with an older version of Business Central.

[Next Chapter](#)

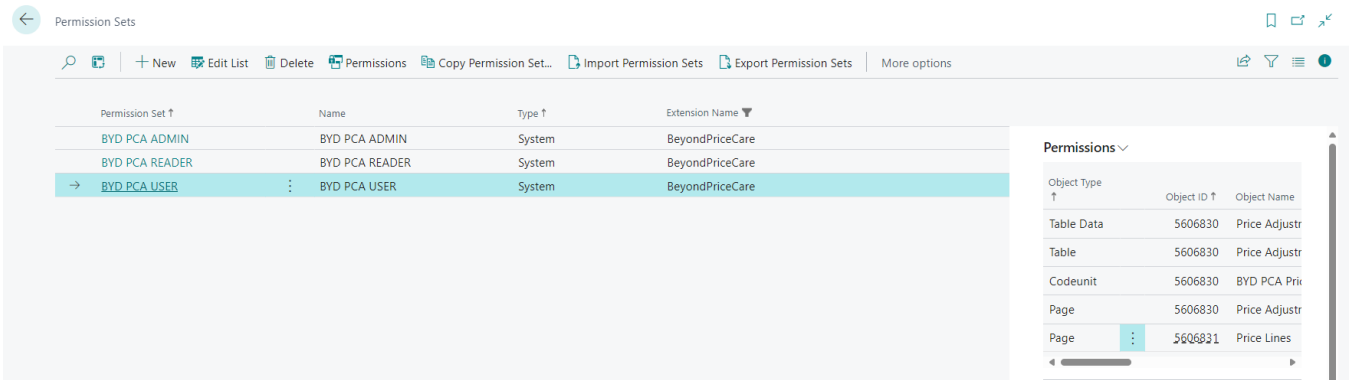
Assign User Permissions

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

Permission Set	Description
BYD PCA Reader	This permission set enables the reading of data from the Beyond Price Care extension.
BYD PCA User	This permission set enables the use of the Beyond Price Care 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 Price Care extension.

To assign the permission set for **Beyond Price Care** 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 Price Care** as filter criteria.
8. The list is filtered to the permission sets of **Beyond Price Care**.
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 Price Care** 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.

[Next Chapter](#)

Setup Price Hints

This chapter describes how to set up price hints. Price hints inform you if no unit price is specified for a line and/or the unit cost is higher than the unit price. The price hints are available for the following document types:

Sales	Service
Sales Order	Service Order
Sales Invoice	-

NOTE

Dialog box is only displayed when invoicing the document!

Please note that the hint regarding a missing unit price or a unit price that is too low (compared to the unit cost) is only displayed if you invoice the documents. If options such as **Invoice** and **Ship and Invoice** are selected, the check is carried out.

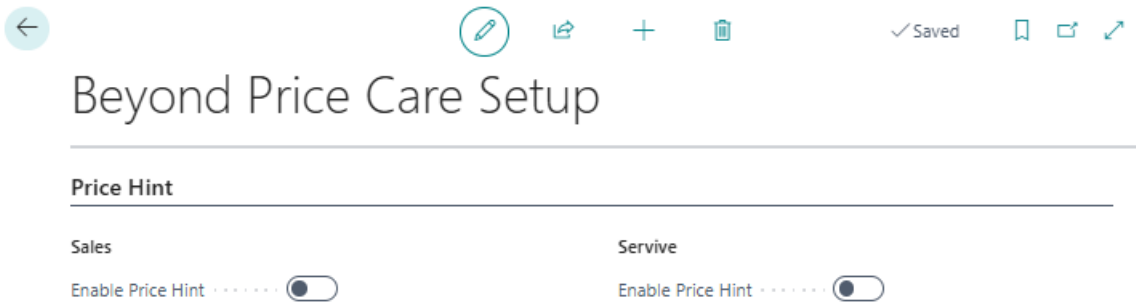
NOTE

No dialog box for mass document processing.

Please note that no dialog box is displayed when several documents are processed at the same time (e.g. for collective invoices). If the price hint feature is activated, the invoices are generated but not posted - even if the **"Invoice"** option has been activated. This can lead to unintentional open invoices. Please check the invoices created manually after the process and post them if necessary.

To activate the price hints, proceed as follows:

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



4. To activate the price hint feature for sales orders and sales invoices, click on the **Enable Price Hint** slider under the **Price Hint** tab in the **Sales** area.
5. To activate the price hint feature for service orders, click on the the **Enable Price Hint** slider under the **Price Hint** tab in the **Service** area.

You have activated the price hint feature.

If there is no unit price or the unit price is lower than the unit cost, you will be notified with the following dialog box:

One ore more lines have no price or a price lower than the unit cost. Would you like to continue posting?

Yes

No

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.

Price Adjustment

ManageLoad DefaultsSave Defaults

New Prices

Purchase

Assign-to Type

Assign-to No.

Defines

Unit Cost

Line Discount %

Starting Date

Save...

Sales

Assign-to Type

Assign-to No.

Defines

Unit Price

Line Discount %

Starting Date

Save...

Purchase Prices

Delete LineShow AllShow Current

Assign-to Type	Assign-to No. (custom)	Defines	Unit of Measure Code (custom)	Minimum Quantity	Direct Unit Cost	Line Discount %	Starting Date	Ending Date
Vendor	10000	Price	STOCK	0	0,22	0,00	01.03.2025	

Sales Prices

Delete LineShow AllShow Current

Assign-to Type	Assign-to No. (custom)	Defines	Unit of Measure Code (custom)	Minimum Quantity	Unit Price	Line Discount %	Starting Date	Ending Date
(All)		Price & Discount	STOCK	0	0,35	0,00	24.03.2025	
Customer	10000	Price	STOCK	0	0,35	0,00	01.03.2025	
Customer	50000	Price	STOCK	0	0,36	0,00	01.03.2025	

Close

7. **Beyond Price Care** 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.

Price Adjustment

Manage Load Defaults Save Defaults

New Prices

Purchase

Assign-to Type: [Dropdown]

Assign-to No.: [Input]

Defines: Price & Discount

Unit Cost: 0,00

Line Discount %: 0,00

Starting Date: [Calendar]

Save...

Sales

Assign-to Type: [All]

Assign-to No.: [Input]

Defines: Price & Discount

Unit Price: 0,00

Line Discount %: 0,00

Starting Date: [Calendar]

Save...

Purchase Prices Delete Line Show All Show Current

Assign-to Type	Assign-to No. (custom)	Defines	Unit of Measure Code (custom)	Minimum Quantity	Direct Unit Cost	Line Discount %	Starting Date	Ending Date
→ Vendor	10000	Price	STÜCK	0	0,22	0,00	01.03.2025	

Sales Prices Delete Line Show All Show Current

Assign-to Type	Assign-to No. (custom)	Defines	Unit of Measure Code (custom)	Minimum Quantity	Unit Price	Line Discount %	Starting Date	Ending Date
→ (All)		Price & Discount	STÜCK	0	0,35	0,00	24.03.2025	
Customer	10000	Price	STÜCK	0	0,35	0,00	01.03.2025	
Customer	50000	Price	STÜCK	0	0,36	0,00	01.03.2025	

Close

7. **Beyond Price Care** 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.

Price Adjustment

Manage

Load Defaults

Save Defaults

New Prices

Purchase

Assign-to Type

Assign-to No.

Defines

Unit Cost

Line Discount %

Starting Date

Save..

Sales

Assign-to Type

Assign-to No.

Defines

Unit Price

Line Discount %

Starting Date

Save..

Purchase Prices

Delete Line

Show All

Show Current

Assign-to Type	Assign-to No. (custom)	Defines	Unit of Measure Code (custom)	Minimum Quantity	Direct Unit Cost	Line Discount %	Starting Date	Ending Date
(There is nothing to show in this view)								

Sales Prices

Delete Line

Show All

Show Current

Assign-to Type	Assign-to No. (custom)	Defines	Unit of Measure Code (custom)	Minimum Quantity	Unit Price	Line Discount %	Starting Date	Ending Date
→ Customer	10000	Price & Discount	STUNDE	0	100,00	0,00	01.03.2025	
Customer	20000	Price	STUNDE	0	120,00	0,00	01.04.2025	
Customer	30000	Price	STUNDE	0	110,00	0,00	01.05.2025	

Close
7. **Beyond Price Care** 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.

Price Adjustment

Manage Load Defaults Save Defaults

New Prices

Purchase

Assign-to Type:

Assign-to No.:

Defines: Price & Discount

Unit Cost: 0,00

Line Discount %: 0,00

Starting Date:

Save...

Sales

Assign-to Type: (All)

Assign-to No.:

Defines: Price & Discount

Unit Price: 0,00

Line Discount %: 0,00

Starting Date:

Save...

Purchase Prices Delete Line Show All Show Current

Assign-to Type	Assign-to No. (custom)	Defines	Unit of Measure Code (custom)	Minimum Quantity	Direct Unit Cost	Line Discount %	Starting Date	Ending Date
(There is nothing to show in this view)								

Sales Prices Delete Line Show All Show Current

Assign-to Type	Assign-to No. (custom)	Defines	Unit of Measure Code (custom)	Minimum Quantity	Unit Price	Line Discount %	Starting Date	Ending Date
→ Customer	10000	Price & Discount	STUNDE	0	100,00	0,00	01.03.2025	
Customer	20000	Price	STUNDE	0	120,00	0,00	01.04.2025	
Customer	50000	Price	STUNDE	0	110,00	0,00	01.05.2025	

Close

7. **Beyond Price Care** 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:
 - o **All Customers:** If you select this value, you change the unit price/sales discount for the resource for all customers.
 - o **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.
 - o **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.
 - o **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.

[Refresh Unit Price](#)

Refresh Unit Price

This chapter describes how you can update the unit price for item or resource lines in a document. The following description uses a sales order to illustrate the function. The function is available in these documents:

- Sales Order
- Service Order
- Service Item Worksheet or Worksheet

To update the unit price for an item or resource line, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Sales Orders** and click on the corresponding search result.
3. The **Sales Orders** list is displayed.
4. Select the sales order in which you want to update the unit price.
5. The sales order is displayed.
6. Select the item and/or resource line(s) under the **Lines** tab where you want to update the unit price.

← Sales Order

101010 · Adatum Corporation

Home

Prepare

Print/Send

Request Approval

Order

More options

General

Customer Name

Adatum Corporation

...

Posting Date

04.06.2025

Contact

Jakob Otto

...

VAT Date

04.06.2025

Document Date

04.06.2025

Order Date

04.06.2025

Lines

Manage

Line

Order

New Line

Delete Line

Select items...

Price Refresh

Rich Text

Type	No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Qty. to Assemble to Order
→ Item	1000	Hochfeste Feingewindeschraube...	250	PCS	0,89	

7. In the **Lines** tab, click on the **Price Refresh** option.
8. A dialog box will appear asking you which prices you would like to refresh.

i

☐ Unit Cost

☐ Unit Price

☒ Both

OK

Cancel

9. To update the unit Price, select the **Unit Cost** option. Optionally, you can update both the unit cost and the unit price with the **Both** option.
10. Confirm the dialog box using the **OK** button.

You have updated the unit Price for the item and/or resource line.

[License Management](#)

Refresh Unit Cost

This chapter describes how you can update the unit cost for item or resource lines in a document. The following description uses a sales order to illustrate the function. The function is available in these documents:

- Sales Order
- Service Order
- Service Item Worksheet or Worksheet

To update the unit cost for an item or resource line, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Sales Orders** and click on the corresponding search result.
3. The **Sales Orders** list is displayed.
4. Select the sales order in which you want to update the unit cost.
5. The sales order is displayed.
6. Select the item and/or resource line(s) under the **Lines** tab where you want to update the unit cost.

← Sales Order

101010 · Adatum Corporation

Home

Prepare

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More options

General

Customer Name

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...

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Jakob Otto

...

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Lines

Manage

Line

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Type	No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Qty. to Assemble to Order
→ Item	1000	Hochfeste Feingewindeschraube...	250	PCS	0,89	

7. In the **Lines** tab, click on the **Price Refresh** option.
8. A dialog box will appear asking you which prices you would like to refresh.

i

☐ Unit Cost

☐ Unit Price

☒ Both

OK

Cancel

9. To update the unit cost, select the **Unit Cost** option. Optionally, you can update both the unit cost and the unit price with the **Both** option.
10. Confirm the dialog box using the **OK** button.

You have updated the unit cost for the item and/or resource line.

[Refresh Unit Price](#)