



BEYOND

Price Changes



BEYONDIT GmbH

Schauenburgerstr. 116
24118 Kiel
Deutschland

+49 431 3630 3700
info@beyondit.gmbh

Table of Contents

About this Documentation

- Preface

- General Information

- About this App

Setup

- Assign User Permissions

- Define Item Quantity Groups

- Define Item Price Groups

- Setup Beyond Price Changes

 - Create Rounding Method

 - Markup Setup

Features

- Setup Markup

- Copy Markup

- Price Info and additional Fields

Preface

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

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

DOWNLOAD
PDF

Manufacturer

Beyond Price Changes 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	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
1.4	16.07.2025	Jannic Weidel	Added documentation for User Permissions
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 Changes is an extension for Microsoft Dynamics 365 Business Central.

Beyond Price Changes 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 Price Changes Documentation](#).

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

NOTE

No dependencies from or to other apps

No additional, basic applications are required to use **Beyond Price Changes**.

Assign User Permissions

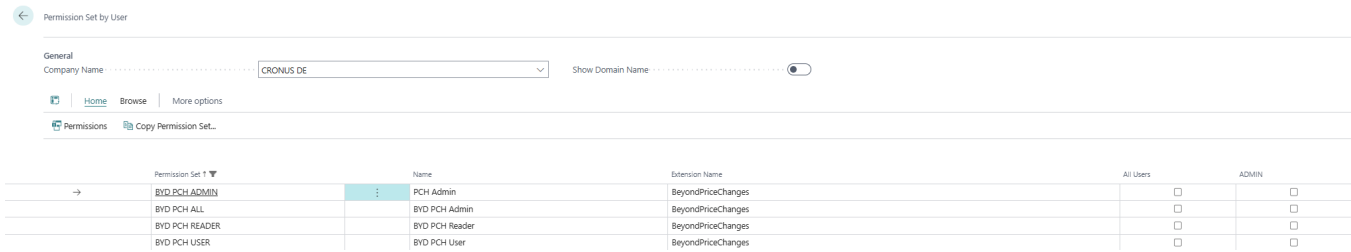
The following description shows how to assign user permissions for the **Beyond Price Changes** extension. The permission sets provided are:

Permission Set	Description
BYD PCH All	This permission set enables the use of the Beyond Price Changes extension. With this permission set, all permissions are assigned without any restrictions.
BYD PCH Admin	This permission set gives the assigned user administrative access to the Beyond Price Changes extension.
BYD PCH Reader	This permission set enables the reading of data from the Beyond Price Changes extension.

BYD PCH User	This permission set enables the use of the Beyond Price Changes 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.
---------------------	--

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

Define Item Quantity Groups

This chapter describes how to define one or more item quantity groups. The item quantity groups are used in **Beyond Price Changes** to define a markup based on certain quantities of an item.

IMPORTANT

Item Quantities and Partial Quantities

You can later use the item quantity groups in the markup matrix to define whether a specific markup should be used for a combination of item quantity and/or item price. When creating the item quantity groups, please note that you may also take partial item quantities into account (e.g. 0.5 L oil or other containers).

IMPORTANT

Creating Item Quantity Groups

When creating multiple item quantity groups, please note that the range is always defined between two groups. You can find more information on this in the screenshots under the **Description** column. There is a start and an end for the corresponding item quantity range, which you define via the data records.

To define one or more item quantity groups, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Item Quantity Groups** and click on the corresponding search result.
3. The **Item Quantity Groups** list is displayed.

← Item Quantity Groups

✓ Saved

🔖 📄 ↗

🔍 🗃️

+ New

Edit List

Delete

🔗 🔍 ☰

Code ↑	Quantity	Description

4. To create a new item quantity group, click on the **New** option in the menu bar.
5. Enter a code for the item quantity group under the **Code** column.
6. Enter the item quantity in the **Quantity** column. Start by entering the largest item quantity and define the range down to the smallest item quantity you are trading. Further information and an example can be found at the end of this section or in the screenshot below.
7. Enter a description for the item quantity group in the **Description** column.

← Item Quantity Groups

✓ Saved

🔖 📄 ↗

🔍 🗃️

+ New

Edit List

Delete

🔗 🔍 ☰

Code ↑	Quantity	Description
BIG	10,00	from a quantity of 10.00
MEDIUM	5,00	from a quantity 5.00 to 9.99
→ SMALL	0,01	from a quantity 0.01 to 4.99

In our example, we have created the following item price groups:

Code	Quantity	Description
BIG	10.00	from a quantity of 10.00
MEDIUM	5.00	from a quantity of 5.00 to 9.99
SMALL	0.01	from a quantity of 0.01 to 4.99

You have defined one or more item quantity groups.

Define Item Price Groups

This chapter describes how to define one or more item price groups. The item price groups are used in **Beyond Price Changes** to define a markup based on item prices. In combination with item quantity groups, complex markup combinations can also be mapped via **Beyond Price Changes**.

IMPORTANT

Creating Item Price Groups

When creating multiple item price groups, please note that the range is always defined between two groups. You can find more information on this in the screenshots under the **Description** column. There is a start and an end for the corresponding item price range, which you define via the data records.

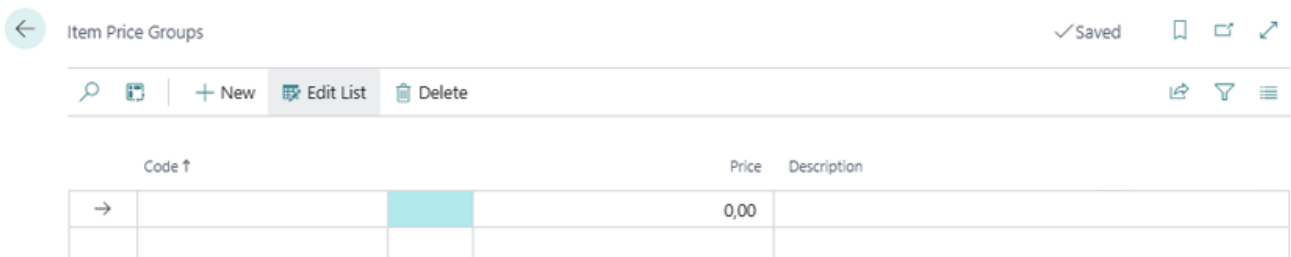
NOTE

Item Price Group MAX already exists

The system already inserts an item price group with the code **MAX**. This item price group includes all prices above the maximum price group you have created. The item price group **Max** is not displayed by default.

To define one or more item price groups, proceed as follows:

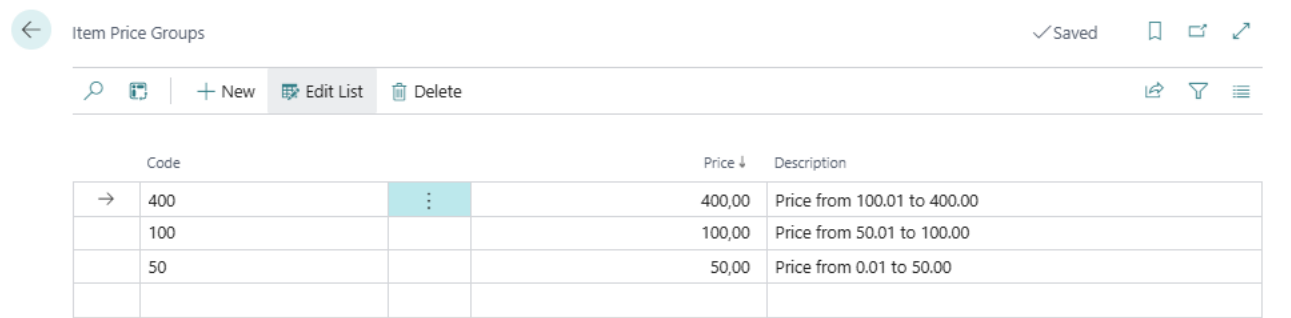
1. Open the search function from the role center (**ALT+Q**).
2. Search for **Item Price Groups** and click on the corresponding search result.
3. The **Item Price Groups** page is displayed.



The screenshot shows the 'Item Price Groups' page. At the top, there is a header bar with a back arrow, the title 'Item Price Groups', and a 'Saved' status. Below the header is a menu bar with options: 'New', 'Edit List', and 'Delete'. The main area contains a table with three columns: 'Code', 'Price', and 'Description'. The 'Code' column has a sort arrow pointing up. The 'Price' column has a value of '0,00'. The 'Description' column is empty.

Code ↑	Price	Description
→	0,00	

4. Click on **New** in the menu bar to define a new item price group.
5. Enter a code for the item price group in the **Code** column.
6. Enter the price in the **Price** column. The price entered in this field indicates the end point of the price band. If you have not yet defined an item price group and enter a value of **50.00**, an item price group will be created that is valid from **0.01** to **50.00**. Further information and an example can be found at the end of this section or in the screenshot below.
7. Enter a description for the item quantity group in the **Description** column.



The screenshot shows the 'Item Price Groups' page after adding three new groups. The table has three columns: 'Code', 'Price', and 'Description'. The 'Code' column has a sort arrow pointing down. The 'Price' column has a value of '400,00'. The 'Description' column contains the text 'Price from 100.01 to 400.00'.

Code ↓	Price	Description
→ 400	400,00	Price from 100.01 to 400.00
100	100,00	Price from 50.01 to 100.00
50	50,00	Price from 0.01 to 50.00

In our example, we have created the following item price groups:

Code	Price	Description
50	50.00	Price from 0.01 to 50.00
100	100.00	Price from 50.01 to 100.00
400	400.00	Price from 100.01 to 400.00
<i>not visible</i>		
MAX	>400.01	All prices from 400.01

You have defined one or more item price groups.

Setup Beyond Price Changes

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

- [Create Rounding Method](#)
- [Markup Setup](#)

Create Rounding Method

This section describes how to create a rounding method.

 NOTE

Rounding method required for setup

Specifying a rounding method is required when setting up **Beyond Price Changes** to define how prices should be rounded. If you have already created a rounding method that you also want to use for markup, you can skip this section.

To create a rounding method, proceed as follows:

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

 Rounding Methods

✓ Saved   

  |  New  Edit List  Delete

Code ↑	Minimum Amount ↑	Amount Added Before	Type	Precision	Amount Added After
→	0	0	Nearest	0	0

4. Select the **New** option from the menu bar.
5. Enter a code for the new rounding method to be created in the **Code** column.
6. Enter the minimum amount for rounding under the **Minimum amount** column.
7. Under the **Amount added before** column, enter the amount to be added to the price before it is rounded.
8. Select the rounding type under the **Type** column. The following options are available to you:
 - **Nearest**: With this type, the amount is rounded commercially, i.e. a decimal place value of 0, 1, 2, 3 or 4 is rounded down and a decimal place value of 5, 6, 7, 8 or 9 is rounded up.
 - **Up**: With this type, the amount is always rounded up.
 - **Down**: With this type, the amount is always rounded down.
9. Under the **Precision** column, enter a value that specifies the number of decimal places (e.g. 0.00000). A maximum of 5 decimal places is possible.
10. Under the **Amount Added After** column, enter the amount that will be added to the price after it has been rounded.

You have created a rounding method.

Markup Setup

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

1. Open the search from the role center (**ALT+Q**).

- 2. Search for **Price Setup** and click on the appropriate search result.
- 3. The **Price Setup** page is displayed.

←

✓ Saved

Price Setup

General

Price Type

Amount Rounding Pr...

Rounding Method Co...

Price List Code

Beautify Price

Customer No.

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

←

✓ Saved

Price Setup

General

Price Type

Percent

Amount Rounding Pr...

0,01

Rounding Method Co...

TEN

Price List Code

DEFAULTCUSTOMERS

Beautify Price

Customer No.

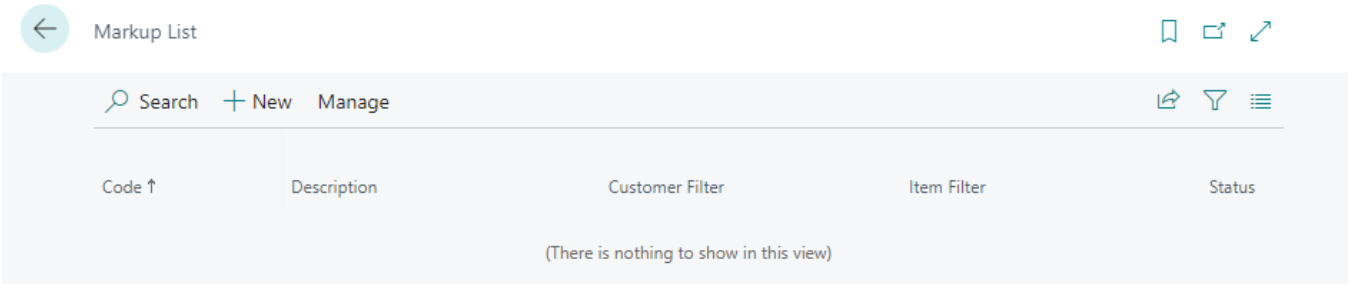
10000

You have completed the price setup.

Setup Markup

This chapter describes how to set up a percentage markup.
To set up a percentage markup, proceed as follows:

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



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

Markup Card

General

Code

*

Customer Filter

VERSION(1) SORTING(No.)

Description

*

Filtered Customers

5

Status

Draft

Total Customers

5

Type

Percent

Item Filter

VERSION(1) SORTING(No.)

Filtered Items

76

Total Items

76

Lines

New Line

Delete Line

Quantity Group Code ↑

Price Group Code ↑

Value

Description

→ *	*		

Matrix

Description

from quantity 0.01 to 4.99

from quantity 5.00 to 9.99

from quantity of 10.00

→ Price from 0.01 to 50.00	:						
Price from 50.01 to 100...							
Price from 100.01 to 40...							
from 400							

- 6. Enter a code for the markup to be configured in the **Code** field.
- 7. Enter a suitable name for the markup in the **Description** field.
- 8. Leave the **Status** field at **Draft** for the time being. With this setting, you activate the configured markup.
- 9. The value in the **Type** field is automatically determined by the system based on the setup. Further information on the value displayed in this field can be found in the chapter [Setup Markup](#).
- 10. Click in the **Customer Filter** field to use the filter to determine the 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 is used. If you do not make any settings, the markup will be applied to all customers. After setting the filter, return to the markup card.
13. The values in the fields **Filtered Customers** and **Total Customers** 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 is used.
14. Click in the **Item Filter** field if you only want to apply the markup to certain 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 settings, 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 an item quantity group for the **Quantity Group Code** column. Further information on the selectable values can be found in the section [Define item quantity groups](#).

Select - Item Quantity Groups



+ New

Edit List



Code ↑	Quantity	Description
→ <u>BIG</u> :	10,00	from quantity of 10.00
MEDIUM	5,00	from quantity 5.00 to 9.99
SMALL	0,01	from quantity 0.01 to 4.99

OK

Cancel

19. Click on the **Price Group Code** column in the markup card and select a price group. Further information on the selectable values can be found in the section [Define item price groups](#).

Select - Item Price Groups



+ New

Edit List



Code ↑	Price	Description
→ <u>100</u> :	100,00	Price from 50.01 to 100.00
400	400,00	Price from 100.01 to 400.00
50	50,00	Price from 0.01 to 50.00

OK

Cancel

20. Select a combination of one of the created item quantity groups and one of the created item price groups on the markup card under the **Lines** area.
21. Enter the value for the combination under the **Value** column. The value is either a percentage value, a fixed amount or a mixture of the two options. This depends on the setup of the markups under the section [Setup Beyond Price Changes](#).
22. The combinations you have entered are displayed under the **Matrix** area. The color highlighting on the following screenshot serves only as an example to illustrate how a percentage matrix has been configured.

Matrix				
Description	from quantity 0.01 to 4.99	from quantity 5.00 to 9.99	from quantity of 10.00	
Price from 0.01 to 50.00	3,00	3,00	3,00	
Price from 50.01 to 100....	3,00	1,50	1,50	
Price from 100.01 to 40...	1,50	1,50	0,50	
→ <u>from 400</u> :	1,50	0,50		

23. To use the configured markup in sales documents, click on the **Verify Lines...** option in the menu bar. The lines entered are checked and the value for the **Status** field under the **General** tab is changed from **Draft** to **Active**.

GENERAL

Copy Markup

General

Code	GENERAL	Item Filter	(Vendor No.=FILTER(*), Blocked=FILTER(false), Gen. Prod. Posting Group=FILTER(*), Item Category Code=FILTER(*))
Description	General		
Status	Active		
Type	Percent	Filtered Items	76
Customer Filter	(Customer Price Group=FILTER(*), Blocked=FILTER(" "))	Total Items	76
Filtered Customers	5		
Total Customers	5		

Lines

New LineDelete Line

Quantity Group Code ↑	Price Group Code ↑	Value	Description
BIG	100	1,50	
BIG	400	0,50	
BIG	50	3,00	
MEDIUM	100	1,50	
MEDIUM	400	1,50	
MEDIUM	50	3,00	
MEDIUM	MAX	0,50	
SMALL	100	3,00	
SMALL	400	1,50	
→ SMALL	50	3,00	
SMALL	MAX	1,50	

Matrix

Description	from quantity 0.01 to 4.99	from quantity 5.00 to 9.99	from quantity of 10.00
Price from 0.01 to 50.00	3,00	3,00	3,00
Price from 50.01 to 100....	3,00	1,50	1,50
Price from 100.01 to 40...	1,50	1,50	0,50
→ from 400	1,50	0,50	

You have created a markup.

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.

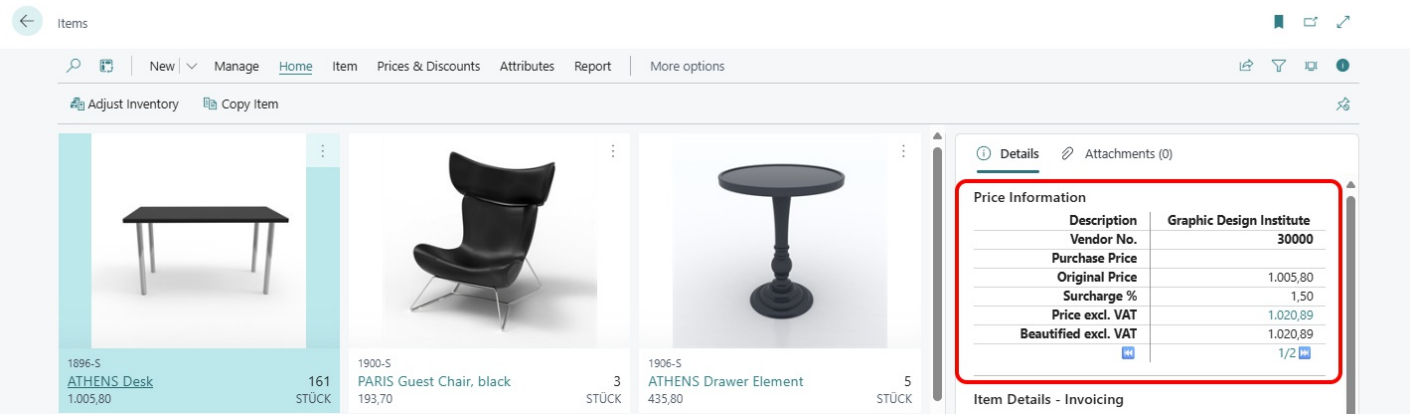
Price Info

Beyond Price Changes adds the **Price Information** section to the factbox area on the following pages/areas:

TIP

Show Factbox Area
The fact box area is shown by default. If the fact box area is not displayed, you can show it again using the key combination **ALT+F2**.

Sales	Service	Other
Sales Order	Service Item Worksheet	Item Card
	Service Lines	Item List



You can use the blue arrow icons at the bottom of the area to navigate between the different price information. Explanations of the displayed lines can be found in the section [Markup Setup](#) or in the following explanations.

Additional Fields

Once **Beyond Price Changes** has been successfully set up, additional fields are displayed in documents under the **Lines** tab. The fields are:

- **Original Price:** This column shows the original sales price without markup in documents.
- **Markup %:** This column indicates the percentage markup for the item line. The markup is taken from the specified value in the surcharge matrix. Further information on the mark-up matrix can be found in the screenshot below.
- **Price Description:** This column shows the basic information used to calculate the line amount. In the first item line in the screenshot below, the value **x1 (€55.2/piece + 3%)** is shown. **x1** represents the item quantity, **€55.2** is the list price, **/piece** is the unit code, and **3%** is the percentage markup to be applied for this combination of item quantity group and item price group.

Sales Order

101010 · Adatum Corporation

Home

Prepare

Print/Send

Request Approval

Order

More options

Post...

Release

Create Warehouse Shipment

Create Inventory Put-away/Pick...

Archive Document

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...

Type	No.	Item Reference No.	Description	Quantity	Unit of Measure Code	Original Price	Markup %	Price description	Line Amount	Unit Price	Qty.
Item	1929-S		AMSTERDAM Lamp	1	STÜCK	55,20	3,00	x1 (€55,20/stück + 3%)	56,89	56,89	
Item	1929-S		AMSTERDAM Lamp	5	STÜCK	55,20	1,50	x5 (€55,20/stück + 1,5%)	279,95	55,99	
Item	1929-S		AMSTERDAM Lamp	10	STÜCK	55,20	1,50	x10 (€55,20/stück + 1,5%)	559,90	55,99	
Item	1896-S		ATHENS Desk	1	STÜCK	1.005,80	1,50	x1 (€1.005,80/stück + 1,5%)	1.020,89	1.020,89	
Item	1896-S		ATHENS Desk	8	STÜCK	1.005,80	0,50	x8 (€1.005,80/stück + 0,5%)	8.086,32	1.010,79	
Item	1896-S		ATHENS Desk	10	STÜCK	1.005,80		x10 (€1.005,80/stück + 0%)	10.057,90	1.005,79	

Markup Card

GENERAL

Copy Markup

More options

General

Code

GENERAL

Item Filter

Vendor No.=FILTER("%

Blocked=FILTER(false)

Gen. Prod. Posting Group=FILTER("%

Item Category Code=FILTER("%

Description

General

Status

Active

Type

Percent

Customer Filter

{Customer Price Group=FILTER("%

Blocked=FILTER(")

Filtered Customers

5

Total Customers

5

Lines >

Matrix

Description	From quantity: 0,01 to 4,99	From quantity: 5,00 to 9,99	From quantity: 10,00 to 19,99
Price from 0.01 to 50.00	3,00	3,00	3,00
Price from 50.01 to 100...	3,00	1,50	1,50
Price from 100.01 to 40...	1,50	1,50	0,50
from 400	1,50	0,50	

These fields are displayed on the following documents/areas:

Sales	Service
Posted Sales Credit Memo	Posted Service Credit Memo
Posted Sales Invoice	Posted Service Invoice
Sales Credit Memo	Service Credit Memo
Sales Invoice	Service Invoice
Sales Order	Service Item Worksheet
Sales Quote	Service Lines
Sales Return Order	

Blanket Sales Order