



Dynamics
Shop

User Guide for Microsoft Dynamics 365 Business Central

Product: SD Intelli Pricing

Release: D365 BC V24+

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2 Getting Started

In standard Microsoft Dynamics 365 Business Central you have the following Sale Types for Sales Prices: Customer; Customer Price Group; All Customers; and Campaign. Microsoft Dynamics 365 Business Central uses the Find Best Price principle and returns the lowest price found.

For those situations where you have fixed price agreements with customers - you need to be able to “turn off” the Find Best Price functionality in standard Microsoft Dynamics 365 Business Central. SD Intelli Pricing allows you to turn off the Find Best Price functionality and use the pricing as defined in your fixed price agreements.

When you initially install SD Intelli Pricing, the Pricing Method is always set to use the standard Microsoft Dynamics 365 Business Central pricing functionality. This allows you to continue using the Microsoft Dynamics 365 Business Central pricing functionality and gives you time to setup your prices in the Price Groups in the SD Intelli Pricing before turning the Multi-Group Pricing functionality on.

In SD Intelli Pricing, you create Price Groups, add items to the Price Groups, and grant customers access to the Price Groups. There is no global price book or price group in SD Intelli Pricing - you associate or link the Price Group to a customer(s). Price Groups are defined in SD Intelli Pricing as either 1-Standard (Normal Price Group), 2-Contract (Contract Price Group), 3-Listed (Listed Price Group), 4-Promotions or 5-Levies.

If a customer has been linked to a Listed Price Group, then only the items on the Listed Price Group can be added to a sales line. The price on the sales line defaults to that from the Listed Price Group and cannot be modified.

If two prices are found for an item, one price from a Price Group of Type 1-Standard and another from a Price Group of Type 2-Contract, the contract price is always used. Within the Price Groups, SD Intelli Pricing will always find the lowest price for the item.

You can set up Promotions (BOGOF or BANDED) and Levies in SD Intelli Pricing and the promotions and levies are auto inserted as a line into the sales lines.

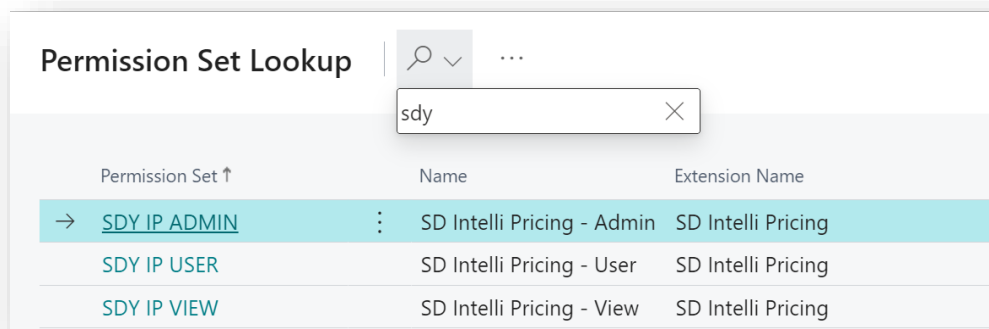
3 Installing SD Intelli Pricing

SD Intelli Pricing, is available to download from AppSource or you can install the app from within Business Central using Extension Marketplace.

The **Allow HttpClient Requests** option is automatically enabled on install of SD Intelli Pricing. Switching on the **Allow HttpClient Requests** option for SD Intelli Pricing in **Extension Management** allows SD Intelli Pricing to call an API that sends and returns licence key information to activate the product licence and to call GitHub to import sample data for the product.

3.1 Security Setup

We have provided the following permission sets for SD Intelli Pricing: SD IP ADMIN, SD IP USER and SD IP VIEW (*Figure 3-1*).



Permission Set ↑	Name	Extension Name
→ SDY IP ADMIN	SD Intelli Pricing - Admin	SD Intelli Pricing
SDY IP USER	SD Intelli Pricing - User	SD Intelli Pricing
SDY IP VIEW	SD Intelli Pricing - View	SD Intelli Pricing

Figure 3-1

We have also created extensions on the following standard Microsoft Dynamics 365 Business Central Permissions:

- Exten. Mgt. - Admin includes SDY IP ADMIN permissions.
- D365 BUS FULL ACCESS includes SDY IP USER permissions.
- D365 BASIC includes SDY IP VIEW permissions.

3.2 Choosing the SD Intelli Pricing Role

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** (Figure 3-2).

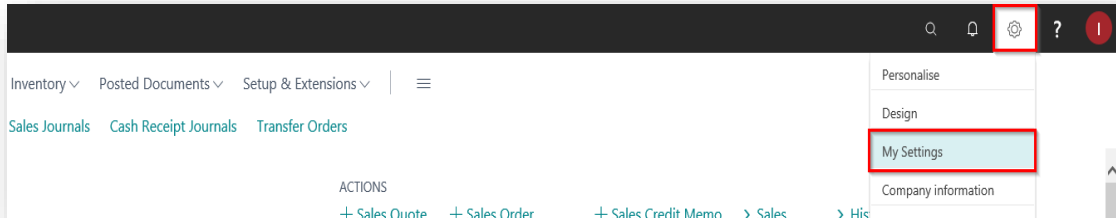


Figure 3-2

2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon (Figure 3-3).



Figure 3-3

3. You should see **SD Intelli Pricing** in the list of Roles (Figure 3-4).

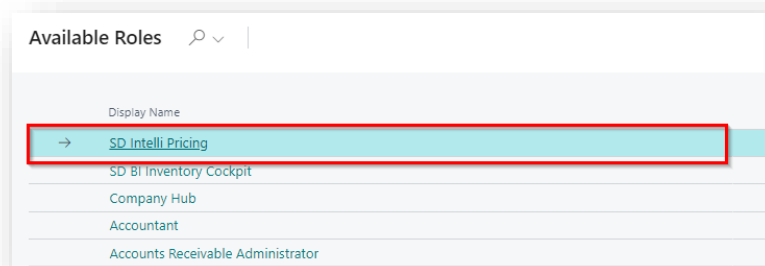
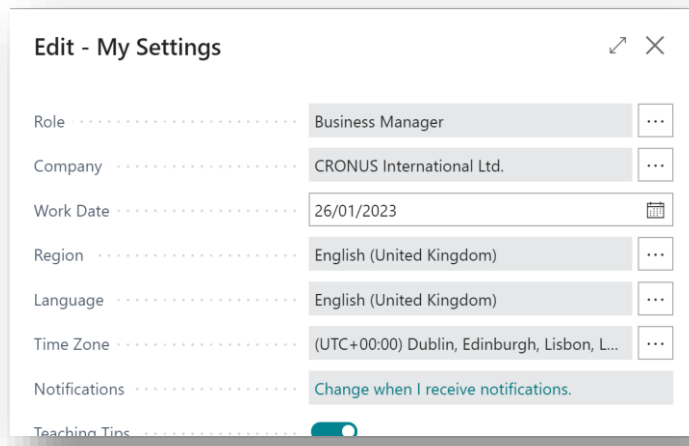


Figure 3-4

4. Choose **SD Intelli Pricing** and click **OK**.

5. The **SD Intelli Pricing** Role should now be displayed in the **Role** field (*Figure 3-5*).



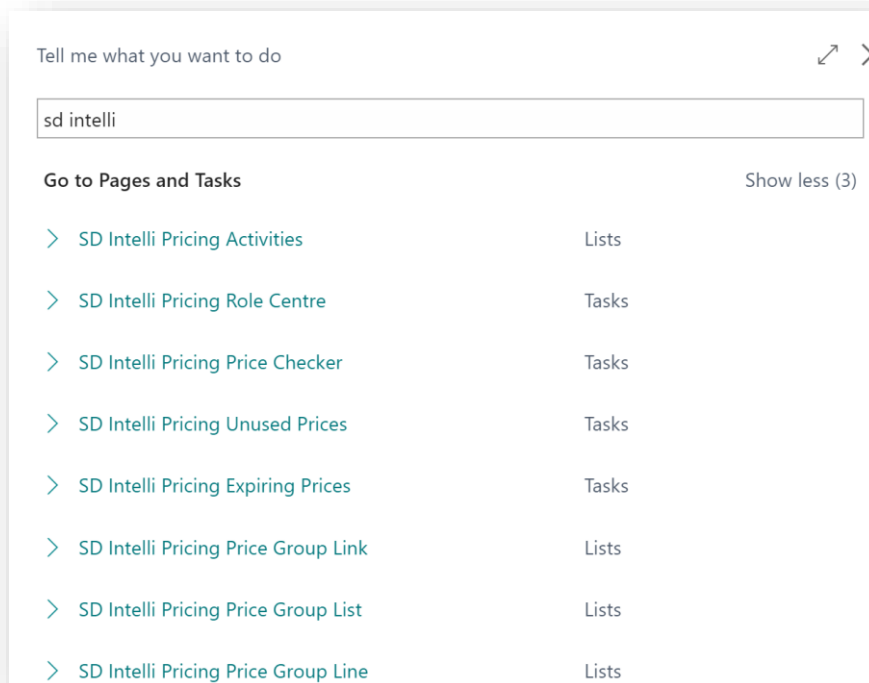
The screenshot shows a dialog box titled "Edit - My Settings" with a close button (X) and a refresh button (↻). The settings are as follows:

Field	Value	Action
Role	Business Manager	...
Company	CRONUS International Ltd.	...
Work Date	26/01/2023	Calendar icon
Region	English (United Kingdom)	...
Language	English (United Kingdom)	...
Time Zone	(UTC+00:00) Dublin, Edinburgh, Lisbon, L...	...
Notifications	Change when I receive notifications.	
Teaching Tips	<input checked="" type="checkbox"/>	

Figure 3-5

3.3 Accessing the SD Intelli Pricing Pages

Use the **Tell Me** to search for SD Intelli Pricing pages. Begin typing **SD** or **Intelli** to see a list of the SD Intelli Pricing pages (*Figure 3-6*).



The screenshot shows a search interface titled "Tell me what you want to do" with a search input field containing "sd intelli". Below the input field, there is a list of results under the heading "Go to Pages and Tasks" with a "Show less (3)" link. The results are as follows:

Item	Type
> SD Intelli Pricing Activities	Lists
> SD Intelli Pricing Role Centre	Tasks
> SD Intelli Pricing Price Checker	Tasks
> SD Intelli Pricing Unused Prices	Tasks
> SD Intelli Pricing Expiring Prices	Tasks
> SD Intelli Pricing Price Group Link	Lists
> SD Intelli Pricing Price Group List	Lists
> SD Intelli Pricing Price Group Line	Lists

Figure 3-6

3.4 Bookmarking the SD Intelli Pricing Activities to Your Role Centre

For easy access to SD Intelli Pricing, you can bookmark the SD Intelli Pricing Activities page to your default Role Centre.

Search for **SD Intelli Pricing Activities** in the Tell Me and choose the Book Mark action to the right of the result (*Figure 3-7*).

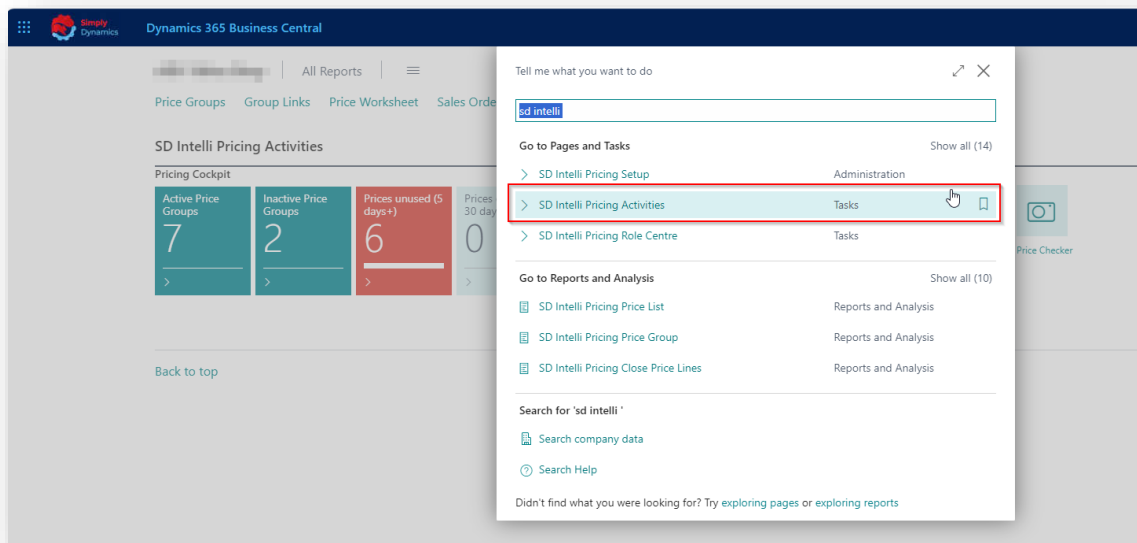


Figure 3-7

The SD Intelli Pricing Activities is now available in the navigation menu on your Role Centre (*Figure 3-8*).

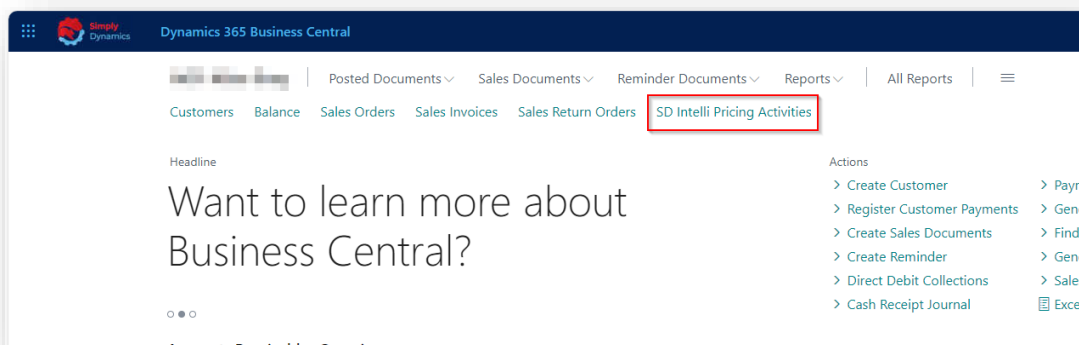


Figure 3-8

3.5 Activating the SD Intelli Pricing Licence

To use SD Intelli Pricing, you must activate the licence.

1. From the **Tell Me**, search for and select the **SD Intelli Pricing Setup** card. When the **SD Intelli Pricing Setup** opens, you are prompted that “Your license is invalid.” Choose **OK** (Figure 3-9).

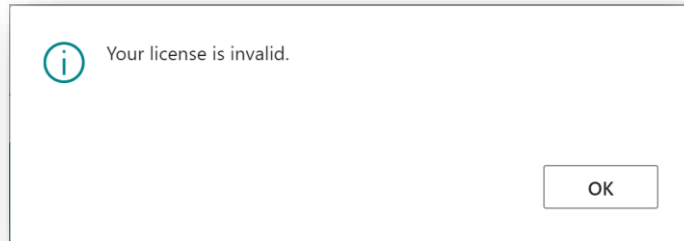


Figure 3-9

2. You are then prompted that “Your SD Intelli Pricing license needs to be validated.” Choose **Yes** (Figure 3-10).

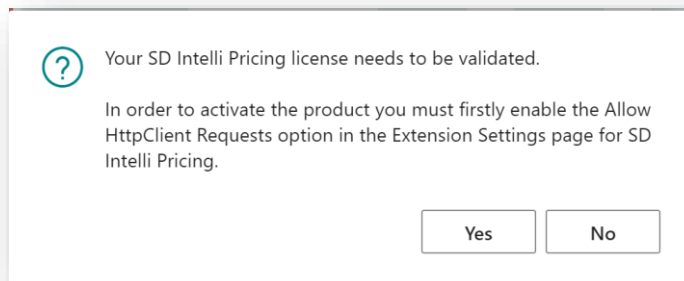


Figure 3-10

3. You will then see the **Activate your product** page.

3.5.1 Activating the SD Intelli Pricing Licence with a Free Trial

If you have not received a Product Key from Simply Dynamics Ltd. and want to avail of a 30 day free trial:

1. In the **Activate your Product** page (*Figure 3-11*)
Enter your company name in **Company Name**
Enter your company email in **Email**.
Choose **Free Trial**

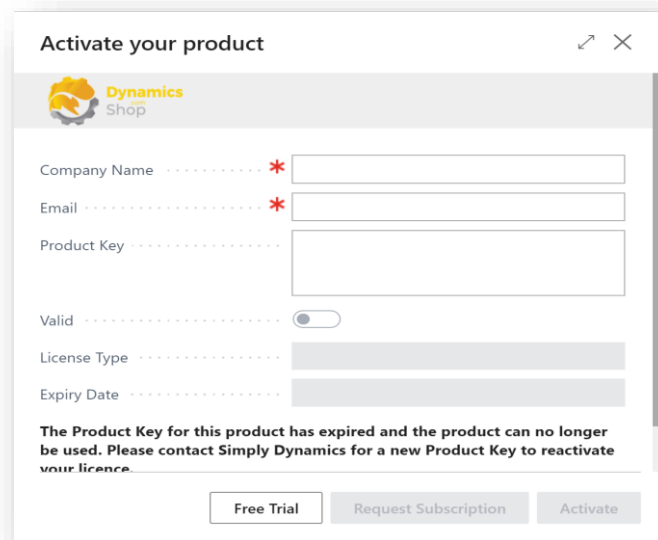


Figure 3-11

2. Choose **Yes** to activate your free trial (*Figure 3-12*).

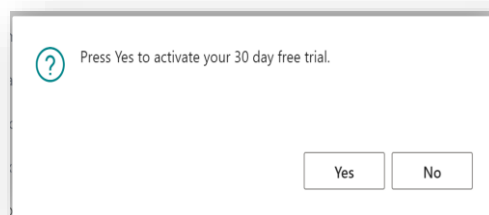
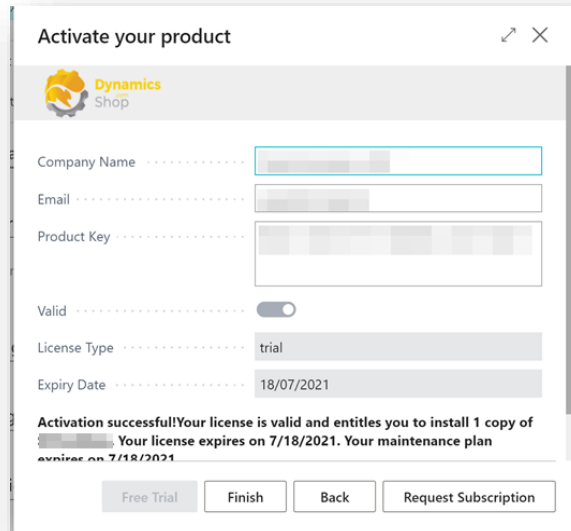


Figure 3-12

- The **Activate your product page** will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial (*Figure 3-13*).



The screenshot shows a web form titled "Activate your product" with the Dynamics Shop logo. The form contains the following fields and controls:

- Company Name: [Redacted]
- Email: [Redacted]
- Product Key: [Redacted]
- Valid:
- License Type: trial
- Expiry Date: 18/07/2021

Below the form, a message states: "Activation successful! Your license is valid and entitles you to install 1 copy of [Redacted]. Your license expires on 7/18/2021. Your maintenance plan expires on 7/18/2021."

At the bottom, there are four buttons: "Free Trial", "Finish", "Back", and "Request Subscription".

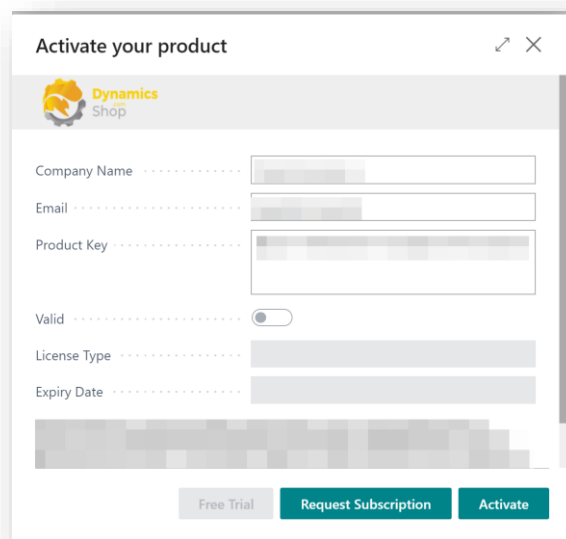
Figure 3-13

- Choose **Finish** to exit the page.
- When your Free Trial has expired, choose **Request Subscription** to request a Product Key from Simply Dynamics.

3.5.2 Activating the SD Intelli Pricing Licence with a Product Key

If you have received a Product Key from Simply Dynamics Ltd.:

1. In the **Activate your Product** page (*Figure 3-14*):
Enter your company name in **Company Name**
Enter your company email in **Email**.
Paste the supplied product key into the **Product Key** field. **Tab off the Product Key field to validate the contents of the field and to enable the Activate key.** Choose **Activate**.



The screenshot shows a web form titled "Activate your product" with the Dynamics Shop logo. The form contains the following fields and controls:

- Company Name: Text input field
- Email: Text input field
- Product Key: Text input field
- Valid: Toggle switch (currently off)
- License Type: Text input field
- Expiry Date: Text input field

At the bottom of the form, there are three buttons: "Free Trial" (disabled), "Request Subscription" (disabled), and "Activate" (active).

Figure 3-14

2. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the date that your subscription licence will expire.

3.6 Setup and Configuration

3.6.1 SD Intelli Pricing Assisted Setup

You can easily import default setup for SD Intelli Pricing using the **Assisted Setup** Action on the **SD Intelli Pricing Setup** page. From the menu choose the **Home** group, and then **Assisted Setup** action (*Figure 3-15*).

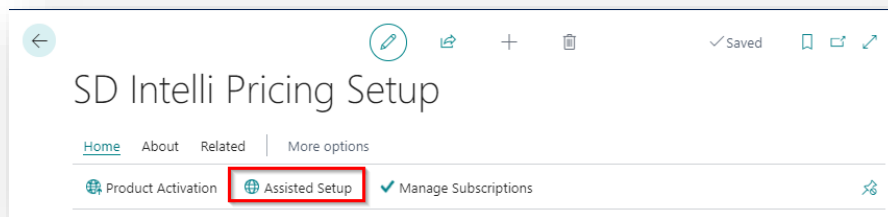


Figure 3-15

1. You are prompted as per the below. Choose **Yes** if this is your first time to use SD Intelli Pricing and you have not already created any setup data (*Figure 3-16*).

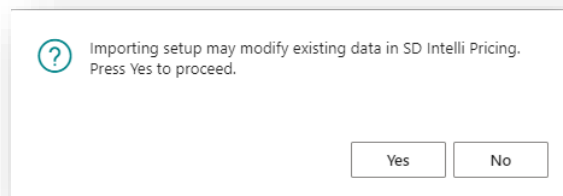


Figure 3-16

2. You are prompted again, choose **Yes**. You will see a message that the default setup has imported. Choose **OK** (*Figure 3-17*).

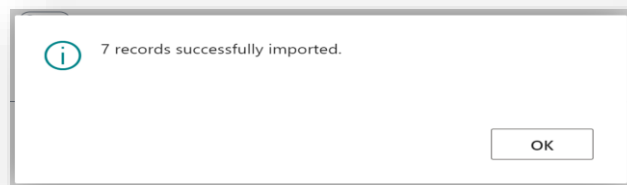


Figure 3-17

4 Understanding SD Intelli Pricing

As mentioned above, in standard Microsoft Dynamics 365 Business Central you have the following Sale Types for Sales Prices: Customer; Customer Price Group; All Customers; and Campaign. Microsoft Dynamics 365 Business Central uses the Find Best Price principle and returns the lowest price found.

For those situations where you have fixed price agreements with customers - you need to be able to "turn off" the Find Best Price functionality in standard Microsoft Dynamics 365 Business Central. SD Intelli Pricing allows you to "turn off" the Find Best Price functionality and use the pricing defined in your fixed price agreements.

When you initially install SD Intelli Pricing, the Pricing Method is always set to use the standard Microsoft Dynamics 365 Business Central pricing functionality. This allows you to continue using the standard Microsoft Dynamics 365 Business Central functionality and gives you time to setup your prices in the Price Groups in the Multi-Group Pricing Module before turning the Multi-Group Pricing functionality on.

4.1 Price Groups and Price Group Links

In SD Intelli Pricing, you create Price Groups, add items to the Price Groups, and grant customers access to the Price Groups. There is no global price book, or price group, in SD Intelli Pricing - you associate or link the Price Group to a customer(s).

Price Groups are defined in SD Intelli Pricing as either 1-Standard (Normal Price Group), 2-Contract (Contract Price Group), 3-Listed (Listed Price Group), 4-Promotions or 5-Levies.

If a customer has been linked to a Listed Price Group, then only the items on the Listed Price Group can be added to a Sales Line. Users are prevented from adding items to the Sales Line that are not defined on the Listed Price Group. The price on the sales line defaults to that from the Listed Price Book and cannot be modified.

If two prices are found for an item, one price from a price group of Level 1-Standard and another from a price group of Level 2-Contract, the contract price is always used. Within the price groups SD Intelli Pricing will always find the lowest price for the Item.

If an item is not on the Price Group Lines of any Price Group, and if you have Default to Item Unit Price selected in the Setup, it will select Unit Price from the Item Card. If you do not have Default to Item Unit Price selected in the Setup and the item is not on the Price Group Lines of any Price Group, then when a Sales Line is entered, the Price remains blank.

You can set up Promotions and Levies using Price Groups and setting the Level to 4–Promotion or 5–Levies.

4.2 [The Price Group Worksheet](#)

The Price Group Worksheet provides a convenient way to manage, adjust and update your prices that have been setup in the Price Group Lines.

5 Using SD Intelli Pricing

5.1 The SD Intelli Pricing Setup

The **SD Intelli Pricing Setup** card is accessed from the **SD Intelli Pricing Role Centre**, by selecting the **Setup** action, or, by searching for **SD Intelli Pricing Setup** in the **Tell Me**.

In the **SD Intelli Pricing Setup** page, expand the **General** FastTab. The **General** FastTab contains the following global settings for SD Intelli Pricing (*Figure 5-1*):

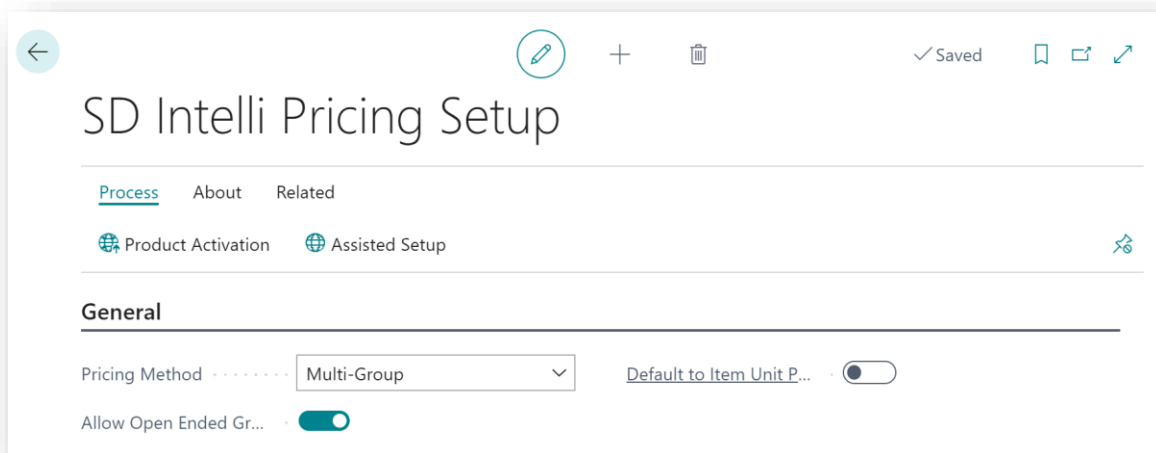


Figure 5-1

- **Pricing Method** - Specifies the Pricing Method to be used. Options are **Standard**, **Multi-Group**.

Standard - Use the standard Microsoft Dynamics 365 Business Central pricing functionality.

Multi-Group - Use the SD Intelli Pricing Multi-Group pricing functionality.

Selecting Multi-Group turns the SD Intelli Pricing Multi-Group pricing functionality on and the standard Microsoft Dynamics 365 Business Central pricing off. This allows users time to set up their prices in SD Intelli Pricing before the standard Microsoft Dynamics 365 Business Central pricing is turned off.

- **Allow Open Ended Groups** - Select this option if you want to set up your Price Groups without having to specify an Ending Date. If this option is not selected, then you must specify an Ending Date when you create a Price Group.

- **Default to Item Unit Price** - Select this option if you want to use the Unit Price from the Item Card where no price is found for the item in the Multi-Group pricing agreements.

The **Price Groups** FastTab contains the following settings that default on to the Price Group header when a new Price Group is created (Figure 5-2):

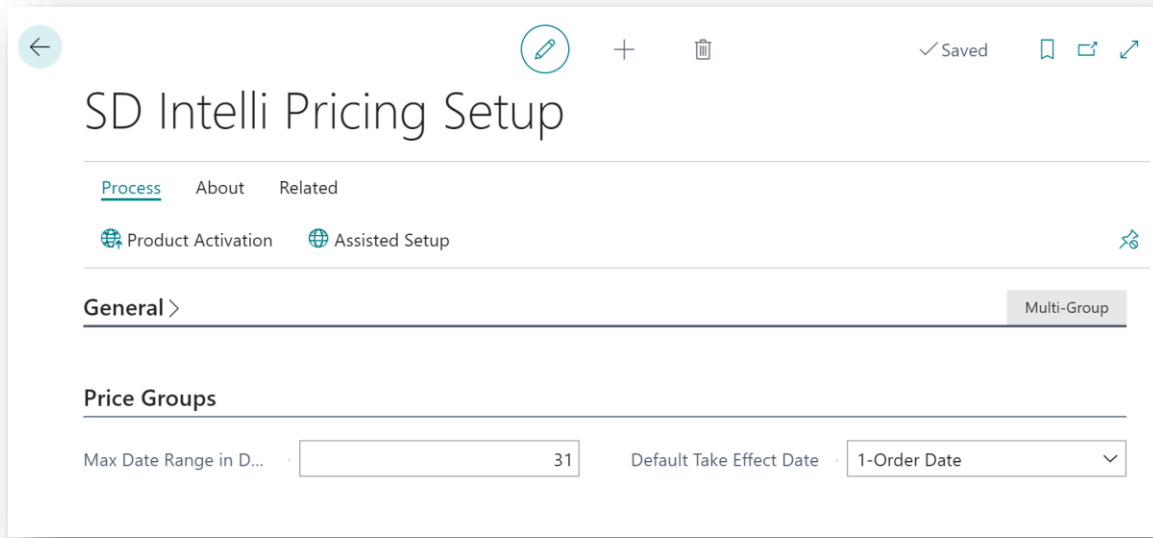


Figure 5-2

- **Max Date Range in Days** - Enter the Max Date Range (expressed in days) for which you do not want the Price Groups Date Range to exceed. If this field is left blank, the Starting Date or Ending Date of the Price Groups will not be restricted.
- **Default Take Effect Date** – Select the value that you want the Take Effect Date on your Price Groups to default to. Options are **1-Order Date**, **2-Document Date**, **3-Requested Delivery Date**, and **4-Shipment Date**.

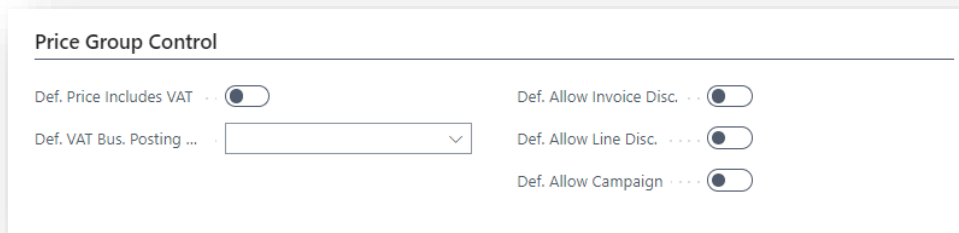
1-Order Date - price determined by the Order Date on the document.

2-Document Date - price determined by the Document Date on the document.

3-Requested Delivery Date - price determined by the date received into your customer's site.

4-Shipment Date - price determined by the date the item leaves your warehouse.

In the **Price Group Control** FastTab (*Figure 5-3*):



Price Group Control

Def. Price Includes VAT ... <input checked="" type="checkbox"/>	Def. Allow Invoice Disc. ... <input checked="" type="checkbox"/>
Def. VAT Bus. Posting ... <input type="text" value=""/>	Def. Allow Line Disc. ... <input checked="" type="checkbox"/>
	Def. Allow Campaign ... <input checked="" type="checkbox"/>

Figure 5-3

- **Def. Price Includes VAT** - Select this option if you want the Price Includes VAT to default to yes when setting up a Price Group.
- **Def. VAT Bus. Posting Gr.** - Select this option if you want the VAT Bus. Posting Gr. (Price) to default to yes when setting up a Price Group.
- **Def. Allow Invoice Disc.** - Select this option if you want the Allow Line Disc. to default to yes when setting up a Price Group.
- **Def. Allow Line Disc.** - Select this option if you want the Allow Line Disc. to default to yes when setting up a Price Group.
- **Def. Allow Campaign** - Select this option if you want the Allow Campaign to default to yes when setting up a Price Group.

In the **KPIs** FastTab (*Figure 5-4*) there are flowfield counts of the various setup tables in SD Intelli Pricing:

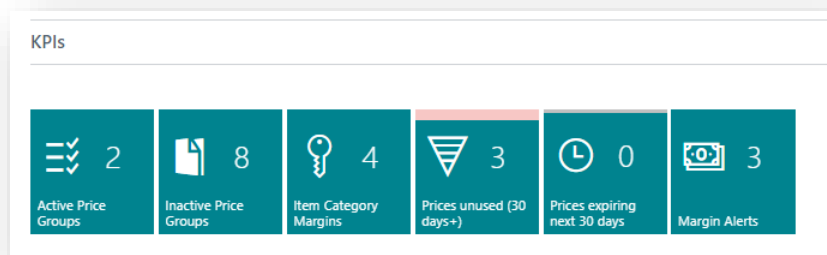
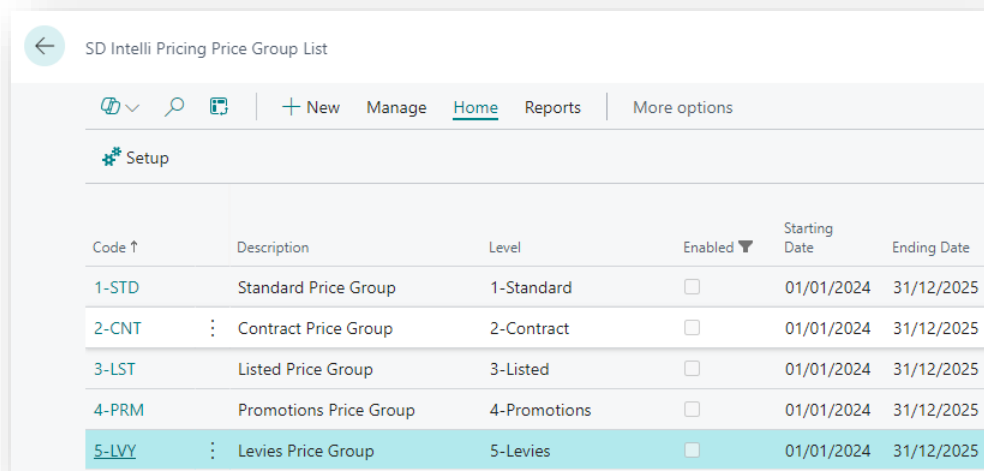


Figure 5-4

5.2 The Price Group List

The **SD Intelli Pricing Price Group List** is accessed from the **SD Intelli Pricing Role Centre**, by drilling through on the **Active Books** cue in the SD Intelli Pricing activity group, or, by searching for the **SD Intelli Pricing Price Group List** in the **Tell Me**.

The **SD Intelli Pricing Price Group List** is a list of the Price Groups that have been setup in SD Intelli Pricing (*Figure 5-5*):



Code ↑	Description	Level	Enabled ▼	Starting Date	Ending Date
1-STD	Standard Price Group	1-Standard	<input type="checkbox"/>	01/01/2024	31/12/2025
2-CNT	Contract Price Group	2-Contract	<input type="checkbox"/>	01/01/2024	31/12/2025
3-LST	Listed Price Group	3-Listed	<input type="checkbox"/>	01/01/2024	31/12/2025
4-PRM	Promotions Price Group	4-Promotions	<input type="checkbox"/>	01/01/2024	31/12/2025
5-LVY	Levies Price Group	5-Levies	<input type="checkbox"/>	01/01/2024	31/12/2025

Figure 5-5

The following actions are available in the **New** and **Manage** group in the **SD Intelli Pricing Price Group List** (*Figure 5-6*):

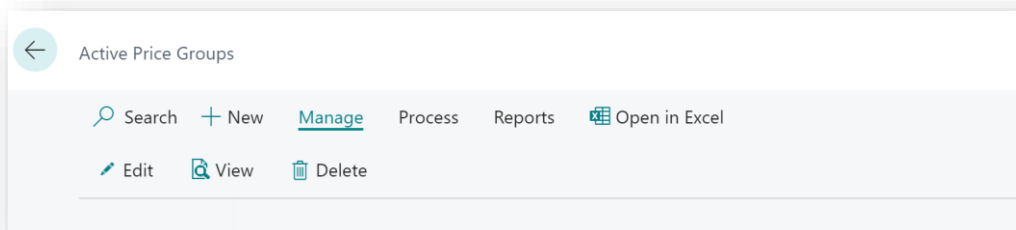


Figure 5-6

- **New** - Choose this action to create a new Price Group. This will open the Price Group card.
- **Edit** – Choose this action to edit an already created Price Group. This will open the Price Group card.

5.3 The Price Group Card

The **SD Intelli Pricing Price Group Card** displays the following fields in the **General** FastTab (Figure 5-7):

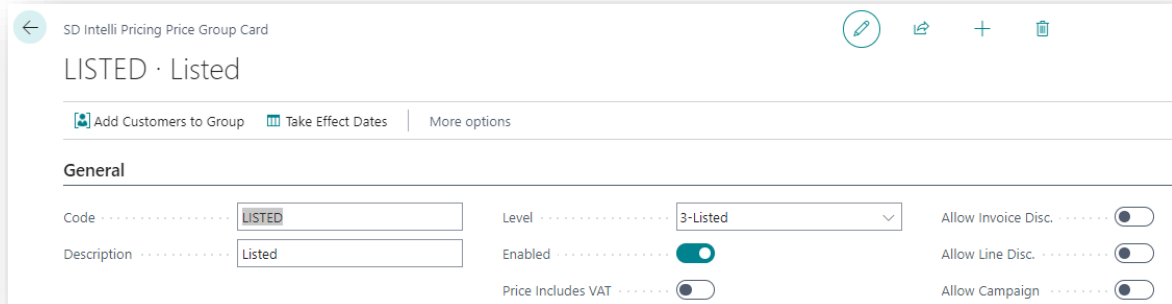


Figure 5-7

- **Code** - A unique code that identifies the Price Group.
- **Description** - A user defined description of the Price Group.
- **Level** - Select from a list of levels to define whether the Price Group is a Standard Price Group, a Contract Price Group, a Listed Price Group, a Promotion Price Group, or a Levies Price Group. Options are **1–Standard, 2–Contract, 3–Listed, 4–Promotions, 5–Levies**.

If a customer has been linked to a Listed Price Group, then only the items on the Listed Price Group can be added to a Sales Line. Users are prevented from adding items to the Sales Line that are not defined on the Listed Price Group. The price on the sales line defaults to that from the Listed Price Book and cannot be modified.

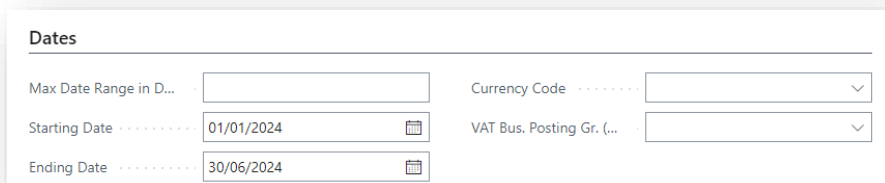
When searching for a price, the Multi-Group functionality in SD Intelli Pricing will return a price from a Price Group at the higher Level of 3–Listed, if prices are found in Price Groups of Levels 1–Standard, 2–Contract and 3–Listed.

In SD Intelli Pricing, Contract pricing overrides Standard pricing.

- **Enabled** - Select this checkbox to enable the Price Group.
- **Price Includes VAT** - Specifies if the prices entered for the Price Group Include VAT. The initial value of the Price Includes VAT field defaults to the value of the Def. Price Includes VAT field in the Price Group Setup.

- **Allow Invoice Disc.** - Specifies if the prices entered for the Price Group allow an Invoice Discount. The initial value of the Allow Invoice Disc. defaults to the value of the Def. Allow Invoice Disc. field in the Price Group Setup.
- **Allow Line Disc.** - Specifies if the prices entered for the Price Group allow a Line Discount. The initial value of the Allow Line Disc defaults to the value of the Def. Allow Line Disc. field in the Price Group Setup.
- **Allow Campaign** - Specifies if the prices entered for the Price Group Allow Campaign. The initial value of the Allow Campaign defaults to the value of the Def. Allow Campaign field in the Price Group Setup.
- **Insert Promotion Comment** – Applicable if the Price Group is Level 4–Promotions. Choose to insert a promotion comment on the sales line if the promoted item meets the criteria for a free item.
- **Insert Levy Comment** – Applicable if the Price Group is Level 5–Levies. Choose to insert a levy comment on the sales line if the item meets the criteria for a levy.

The following fields exist in the **Dates** FastTab (*Figure 5-8*):



Dates	
Max Date Range in D...	Currency Code
Starting Date	VAT Bus. Posting Gr. (...)
Ending Date	

Figure 5-8

- **Max Date Range in Days** - Enter the Max Date Range (expressed in days) that you do not want the Price Group Date Range to exceed.
- **Starting Date** - Enter a Starting Date from which the Price Group will apply.
- **Ending Date** - Enter an Ending Date up to which the Price Group will apply.
- **Currency Code** - Enter the Currency Code for the Price Group. Choose from a list of existing Currency Codes.
- **VAT. Bus. Posting Gr. (Price)** - Specifies the VAT. Bus. Posting Group for the Price Group. The initial value of the VAT. Bus. Posting Gr. (Price) defaults to the value of the Def. VAT Bus. Posting Gr. field in the Price Group Setup.

5.3.1 1–Standard, 2–Contract, or 3–Listed

If the Price Group Level is **1–Standard**, **2–Contract**, or **3–Listed** the **Price Group Lines** FastTab is displayed (*Figure 5-9*):

Price Group Lines		Manage						
Item No. ↑	Item Description	Unit of Measure Code ↑	Minimum Quantity ↑	Item Unit Price	Unit Price	Starting Date ↑	Ending Date	
→ 1900-S	PARIS Guest Chair, black	PCS	0.00	125.10	125.00	01/04/2021	31/05/2021	
1906-S	ATHENS Mobile Pedestal	PCS	1.00	281.40	280.00	01/04/2021	31/05/2021	
1908-S	LONDON Swivel Chair, blue	PCS	2.00	123.30	122.00	01/04/2021	31/05/2021	
1920-S	ANTWERP Conference Table	PCS	0.00	420.40	420.00	01/04/2021	31/05/2021	

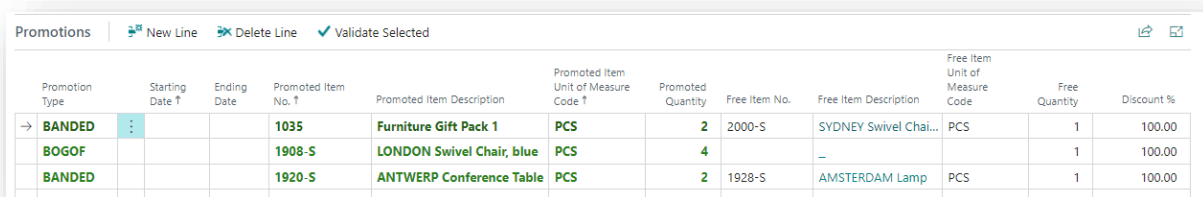
Figure 5-9

- **Item No.** - Enter the Item No. that you want to set a price for in the Price Group.
- **Unit of Measure Code** - Enter the Unit of Measure for which the price will apply.
- **Minimum Quantity** - Enter the Minimum Quantity that must be met on the sales line before the price entered in **Unit Price** will apply for the **Item No.**
- **Item Unit Price** – Displays the Unit Price from the item card.
- **Unit Price** - Enter the Unit Price which will be selected once all conditions on the Price Group and the Price Group Lines are met.
- **Starting Date** - Enter a Starting Date from which the price will apply for the **Item No.** If a Starting Date is not specified on the Price Group Line, the Starting Date on the Price Group Header will be used when searching for a price.
- **Ending Date** - Enter an Ending Date up to which the price will apply for the Item No. If an Ending Date is not specified on the Price Group Line, the Ending Date on the Price Group Header will be used when searching for a price.
- **Variant Code** - Enter a Variant Code for which the price will apply for the **Item No.**
- **VAT Prod Posting Group** – Displays the VAT Prod. Posting Group from the item card.
- **Currency Code** – Displays the Currency Code entered on the Price Group header.
- **Qty. per Unit of Measure** – Displays the Qty. per Unit of Measure from the item card.

- **Unit Cost (LCY)** – Displays the Unit Cost (LCY) from the item card.
- **Last Direct Cost** – Displays the Last Direct Cost from the item card.

5.3.2 4–Promotions

If the Price Group Level is **4–Promotions** the **Promotions** FastTab is displayed (*Figure 5-10*):



Promotion Type	Starting Date †	Ending Date	Promoted Item No. †	Promoted Item Description	Promoted Item Unit of Measure Code †	Promoted Quantity	Free Item No.	Free Item Description	Free Item Unit of Measure Code	Free Quantity	Discount %
→ BANDED			1035	Furniture Gift Pack 1	PCS	2	2000-S	SVDNEY Swivel Chair...	PCS	1	100.00
BOGOF			1908-S	LONDON Swivel Chair, blue	PCS	4	-			1	100.00
BANDED			1920-S	ANTWERP Conference Table	PCS	2	1928-S	AMSTERDAM Lamp	PCS	1	100.00

Figure 5-10

- **Promotion Type** - Select a promotion type. Options are BOGOF or BANDED.
- **Starting Date** - Enter a Starting Date from which the promotion will apply for the Promoted Item No. If a Starting Date is not specified, the Starting Date on the Price Group Header will be used when searching for a promotion.
- **Ending Date** - Enter an Ending Date up to which the promotion will apply for the Promoted Item No. If an Ending Date is not specified, the Ending Date on the Price Group Header will be used when searching for a promotion.
- **Promoted Item No.** - Enter the Item No. that you want to promote. For multi item BANDED offers such as “buy 2 of x, 1 of y and get z for free”, set up the Promoted Item No. as an Assembly BOM.
- **Unit of Measure Code** - Enter the Unit of Measure for which the promotion will apply.
- **Promoted Quantity** - Enter the quantity that must be entered on the sales line for the Free Quantity or Free Item to be entered on Release of the Sales Document.
- **Free Item No.** – Applies to BANDED promotions. Enter the item that will be given as free if the promotion’s criteria are met.
- **Free Quantity** – Enter the quantity of the item that will be given for free if the promotion’s criteria are met.

- **Discount %** - The free quantity of the item is inserted into the Sales Line as a discount percentage.

In the Sales Document, choose the **Process Promotions & Levies** action to calculate and insert any promotions or levies on to the Sales Lines. The promoted quantity must be entered on the one sales line and not split over multiple lines.

Each time the Sales Document is released, or the **Process Promotions & Levies** action is chosen, the promotions and levies are recreated on the lines. Note that if you partially ship a line that has created a promotion or levy line, the promotions or levy lines won't be recreated.

If you choose the Copy Document functionality, you will need to delete any promotion or levy lines that have been copied and choose the Process Promotions & Levies action to recreate the promotion and levy lines.

5.3.3 5–Levies

If the Price Group Level is **5–Levies** the **Levies** FastTab is displayed (*Figure 5-11*):

Levy Scheme	Item No. ↑	Item Description	Unit of Measure Code	Levy Amount ↑	Item Unit Price	Qty. per Unit of Measure	Levy Item No.	Levy Item Description	Levy Item Unit of Measure Code
DRS	1034	Cola 0.5 L	CASE	0.15	1.00	20.00	1033	DRS Scheme - cans/small bottles	PCS
DRS	1036	Lemonade can 250ml	PCS	0.15	1.00	1.00	1033	DRS Scheme - cans/small bottles	PCS
DRS	1039	Cola 1 L	CASE	0.30	1.85	12.00	1040	DRS scheme - large bottles	PCS
DRS	1060	Cola 0.5 L CASE 12	PCS	0.15	14.00	0.08	1033	DRS Scheme - cans/small bottles	PCS

Figure 5-11

- **Item No.** - Select the item that will have the levy applied to it.
- **Unit of Measure Code** - Enter the unit of measure for the item for which the levy amount will apply per unit.
- **Levy Amount** – Enter the levy amount to be applied to the item.
- **Item Unit Price** – The Unit Price for the item in **Item No.**
- **Qty. per Unit of Measure** – The quantity per unit of measure for the item in **Item No.**
- **Levy Item No.** - Select the item from a list of Service or Non Inventory items that you have set up as the Levy Item.

- **Starting Date** - Enter a Starting Date from which the levy will apply. If a Starting Date is not specified, the Starting Date on the Price Group Header will be used when searching for a levy.
- **Ending Date** - Enter an Ending Date up to which the levy will apply. If an Ending Date is not specified, the Ending Date on the Price Group Header will be used when searching for a levy.

In the Sales Document, choose the **Process Promotions & Levies** action to calculate and insert any promotions or levies on to the Sales Lines.

Each time the Sales Document is released, or the **Process Promotions & Levies** action is chosen, the promotions and levies are recreated on the lines. Note that if you partially ship a line that has created a promotion or levy line, the promotions or levy lines won't be recreated.

If you choose the Copy Document functionality, you will need to delete any promotion or levy lines that have been copied and choose the Process Promotions & Levies action to recreate the promotion and levy lines.

5.3.4 Actions and FactBoxes

The following actions are available on the Price Group Card (*Figure 5-12*):

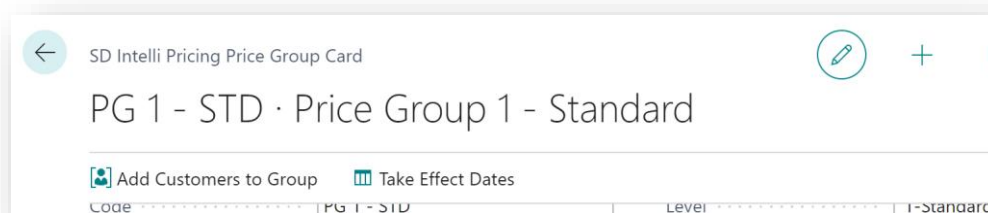
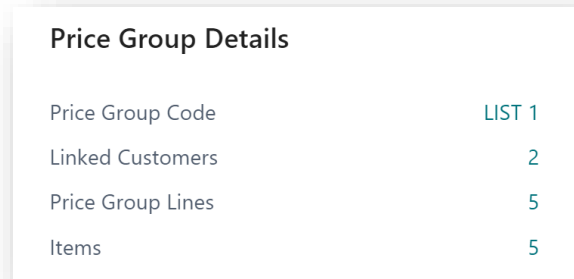


Figure 5-12

- **Add Customers to Group** – Choose this action to link customers to the Price Group. You can bulk add customers to the Price Group by selecting the customer records you want to add to the Price Group.
- **Take Effect Dates** – Choose this action to update the Customer's Take Effect Dates for the Price Group. The Take Effect Date defaults to that specified on the SD Intelli Pricing Setup Card.

Depending on the Price Group Level, various FactBoxes are displayed on the Price Group page that supply additional information for the Price Group. The **Price Group Details** FactBox displays the following fields (*Figure 5-13*):

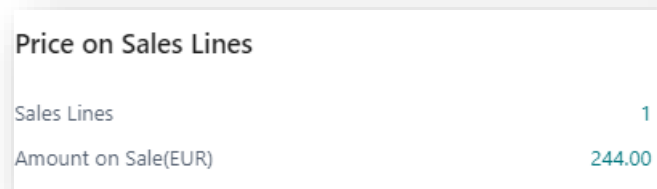


Price Group Details	
Price Group Code	LIST 1
Linked Customers	2
Price Group Lines	5
Items	5

Figure 5-13

- **Linked Customers** - Displays a count of the customers that have been granted access to the Price Group. Click through on the count to open the Price Group Link page to display the customers that have been granted access to the Price Group or to link a new customer to the Price Group.
- **Price Group Lines** – Displays a count of the Price Group Lines on the Price Group.
- **Items** – Displays a distinct count of the items on the Price Group.

The **Price on Sales Lines** FactBox displays the following fields (*Figure 5-14*):



Price on Sales Lines	
Sales Lines	1
Amount on Sale(EUR)	244.00

Figure 5-14

- **Sales Lines** – Displays a count of the Sales Lines that have the price on the Price Group Line.
- **Amount on Sale** – Displays the amount of the Sales Lines for that price on the Price Group Line.

The **Price on Posted Sales Invoices** FactBox displays the following fields (*Figure 5-15*):

Count Price Used	1
Last Date Price Used	20/05/2021
Count Customers Used	1
Amount Sold(GBP)	500.00

Figure 5-15

- **Count Price Used** – Displays a count of the Posted Sales Invoice Lines that have the price on the Price Group Line.
- **Last Date Price Used** – Displays the last date that the price on the Price Group Line was used.
- **Count Customers Used** – Displays a count of the customers that have used the price on the Price Group Line.
- **Amount Sold** – Displays the amount on the Posted Sales Lines for that price on the Price Group Line.

The **Promotion Detail** FactBox displays the following fields (*Figure 5-16*):

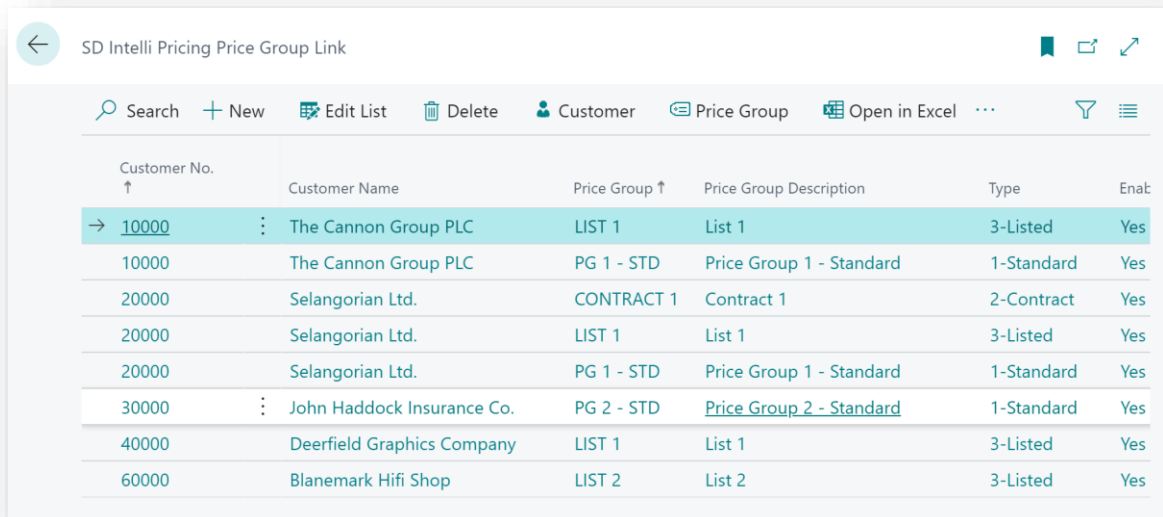
Promotion Detail	
Promotion on Posted Sales Invoices	
Count Promotion Used	2
Last Date Promotion Used	19/06/2024
Count Customers Used	1
Total Promoted Quantity	1.00
Sales Order Comment	
Buy 4 of LONDON Swivel Chair, blue and get 1 of LONDON Swivel Chair, blue for 100.00% discount	

Figure 5-16

- **Count Promotion Used** – Displays a count of the Posted Sales Invoice Lines that have used the promotion.
- **Last Date Promotion Used** – Displays the last date that the promotion was used.
- **Count Customers Used** – Displays a count of the customers that have used the promotion.
- **Total Promoted Quantity** – Displays the quantity of the promoted item that exists on the Posted Sales Lines.

5.4 The Price Group Link

The **SD Price Group Link** is accessed from the **SD Intelli Pricing Price Group Card**, by drilling through on the **Linked Customers** in the Price Group Details FactBox, or, by searching for the **Price Group Link** in the **Tell Me** and contains the following fields (*Figure 5-17*):



Customer No. ↑	Customer Name	Price Group ↑	Price Group Description	Type	Enab
→ 10000	The Cannon Group PLC	LIST 1	List 1	3-Listed	Yes
10000	The Cannon Group PLC	PG 1 - STD	Price Group 1 - Standard	1-Standard	Yes
20000	Selangorian Ltd.	CONTRACT 1	Contract 1	2-Contract	Yes
20000	Selangorian Ltd.	LIST 1	List 1	3-Listed	Yes
20000	Selangorian Ltd.	PG 1 - STD	Price Group 1 - Standard	1-Standard	Yes
30000	John Haddock Insurance Co.	PG 2 - STD	Price Group 2 - Standard	1-Standard	Yes
40000	Deerfield Graphics Company	LIST 1	List 1	3-Listed	Yes
60000	Blanemark Hifi Shop	LIST 2	List 2	3-Listed	Yes

Figure 5-17

- **Customer No.** - Select the customer that you want to grant access to the Price Group. Select from a list of existing customers.
- **Customer Name** - Displays the Name of the customer chosen in **Customer No.**
- **Price Group Code** - Select the Price Group Code that you want to grant the customer access to.
- **Price Group Description** - Displays the user defined description of the Price Group entered in **Price Group Code**.
- **Level** - The Level of the Price Group Code that the Customer has been granted access to.
- **Enabled** - Displays whether the Price Group has been enabled in the Price Group card.
- **Starting Date** - Displays the Starting Date, as specified in the Price Group Card from which the Price Group will apply.

- **Ending Date** - Displays the Ending Date, as specified in the Price Group Card up to which the Price Group will apply.
- **Currency Code** - Displays the Currency Code of the Price Group, as specified in the Price Group Card.

There are several **actions** that can be selected (*Figure 5-18*):

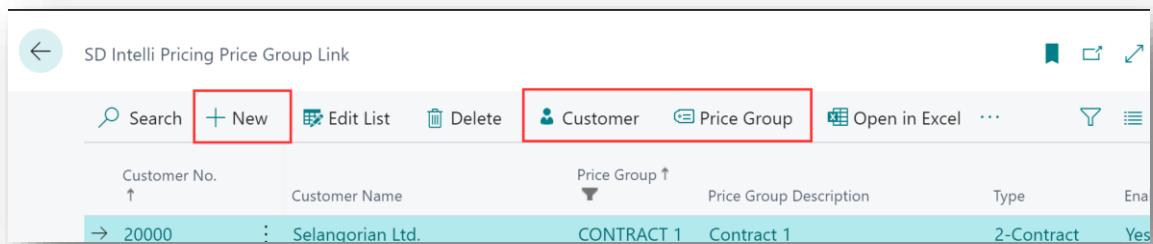
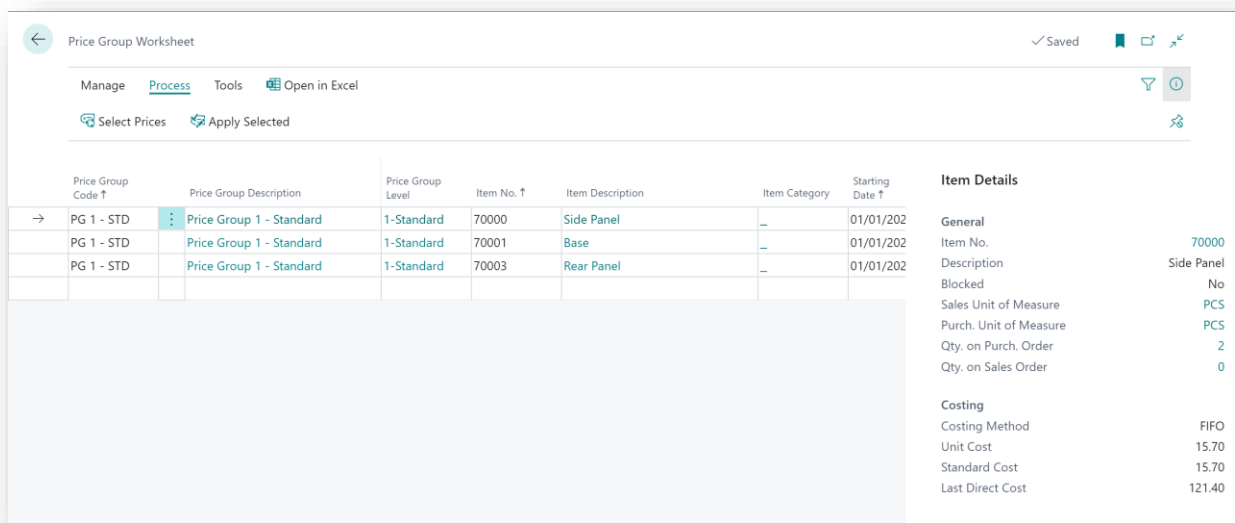


Figure 5-18

- **New** - Choose this action to create a new Price Group Link.
- **Customer** - Opens the standard Microsoft Dynamics 365 Business Centre Customer card, Page ID 21, for the selected customer.
- **Price Group** - Opens the Price Group Card for the Price Group Code linked to the selected customer.

5.5 The Price Group Worksheet

The **Price Group Worksheet**, is accessed from the **Price Groups List** by selecting **Worksheet** from the **Home** tab, in the **Multi Group Pricing** group or by searching in the Tell Me. The Price Group Worksheet provides a convenient way to manage, adjust and update your prices in the **Price Group Lines** (Figure 5-19).



Price Group Code ↑	Price Group Description	Price Group Level	Item No. ↑	Item Description	Item Category	Starting Date ↑	Item Details	
→ PG 1 - STD	Price Group 1 - Standard	1-Standard	70000	Side Panel	-	01/01/202	General Item No. 70000 Description Side Panel Blocked No Sales Unit of Measure PCS Purch. Unit of Measure PCS Qty. on Purch. Order 2 Qty. on Sales Order 0 Costing Costing Method FIFO Unit Cost 15.70 Standard Cost 15.70 Last Direct Cost 121.40	
PG 1 - STD	Price Group 1 - Standard	1-Standard	70001	Base	-	01/01/202		
PG 1 - STD	Price Group 1 - Standard	1-Standard	70003	Rear Panel	-	01/01/202		

Figure 5-19

- **Price Group Code** - Specifies the Price Group Code.
- **Price Group Description** - Displays the user defined description of the Price Group Code.
- **Price Group Level** - Displays the level of the Price Group Code.
- **Item No.** - The Item No. in the Price Group Line.
- **Item Description** – Displays the description of the Item in Item No.
- **Item Category** – Displays the Item Category from the Item Card for the Item in Item No.
- **Starting Date** - The Starting Date from the Price Group Line.
- **Ending Date** - The Ending Date from the Price Group Line.

- **Variant Code** - The Variant Code from the Price Group Line.
- **Unit of Measure Code** - The Unit of Measure from the Price Group Line.
- **Qty. per Unit of Measure** – Displays the Qty. per Unit of Measure from the Price Group Line.
- **Minimum Quantity** - The Minimum Quantity from the Price Group Line.
- **Unit Price** – The Unit Price from the Price Group Line.
- **Original Unit Price** – Displays the original Unit Price from the Price Group Line.
- **Currency Code** – Displays the Currency Code from the Price Group Line.

The following **Actions** are available in the **Process** group on the **Price Group Worksheet** (Figure 5-20):

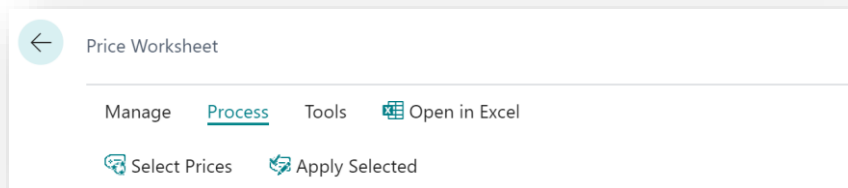


Figure 5-20

- **Select Prices** - Choose this Action to insert Price Group Lines from the existing Price Groups defined in SD Intelli Pricing into the Price Group Worksheet. You can specify whether to Append To, or Update, existing records in the Price Group Worksheet.

You can also filter on the existing Price Groups, on individual items in the Price Groups, or on individual conditions of the Price Group Line.

- **Apply Selected** - Choose this Action to apply the changes that have been made on the Price Group Worksheet Lines to the corresponding Price Group lines.

The following **Actions** are available in the **Tools** group on the **Price Group Worksheet** (*Figure 5-21*):

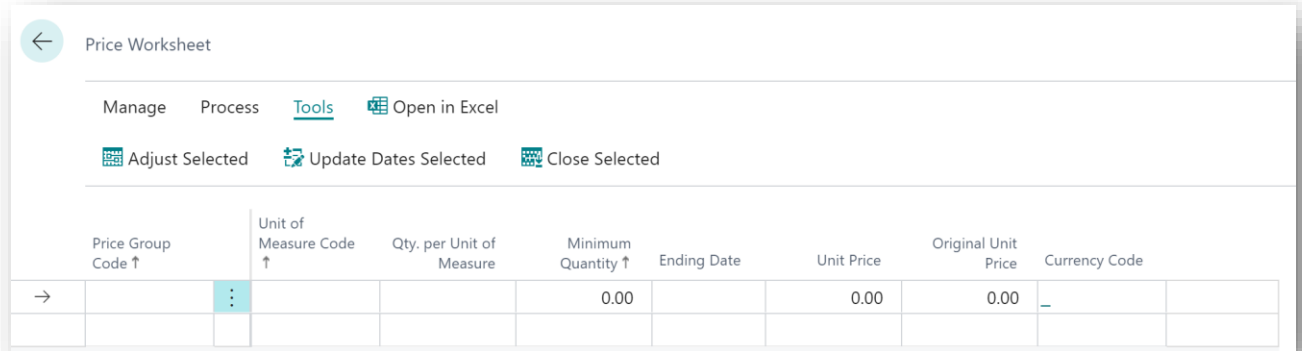


Figure 5-21

- **Adjust Selected** - Choose this Action to mass adjust the selected Price Group Worksheet Lines. You can specify the Adjustment type to apply to the Worksheet Lines. Options are **Percentage**, **Value**, **Set Price**.

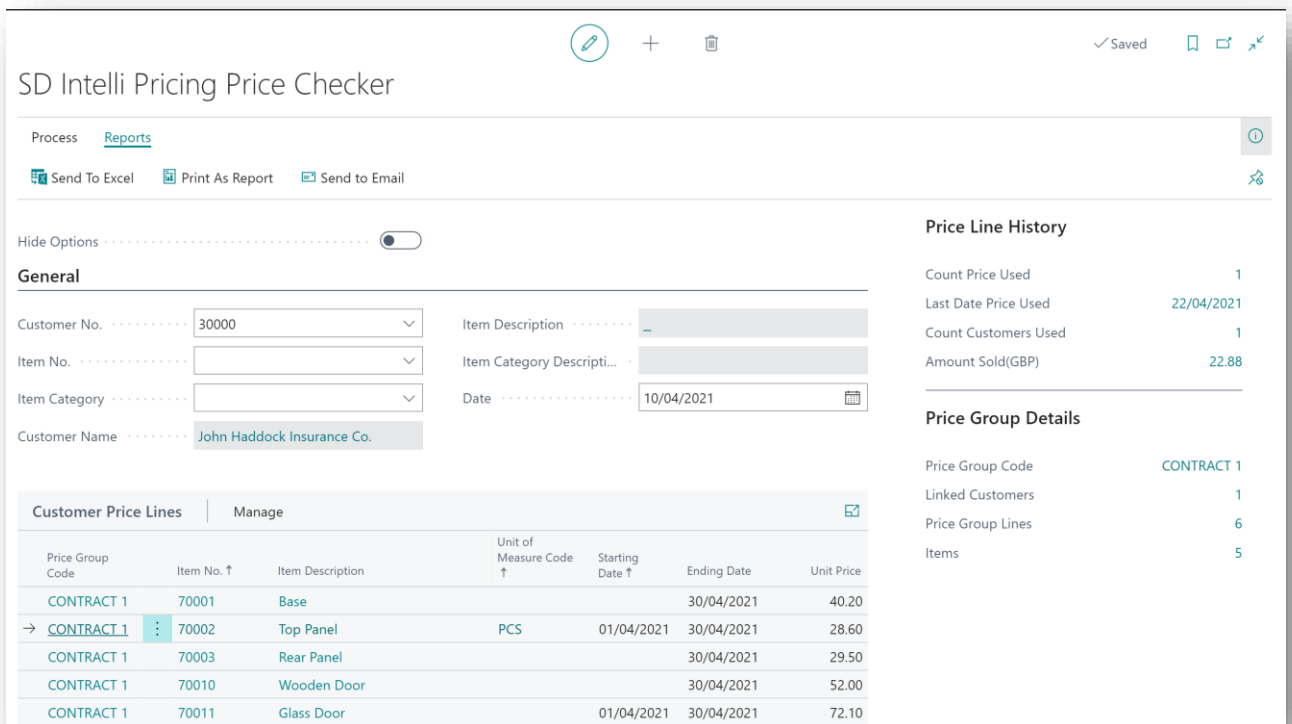
Enter the value in the **Adjustment Value**, and a value to round the Adjustment Value to, in the **Round To** field. You can also filter on the selected Price Group Worksheet Lines.

- **Update Dates Selected** – Choose this Action to mass update the Start and End Dates for the selected Price Group Worksheet Lines.
- **Close Selected** - Choose this Action to update the selected Price Group Worksheet Lines with an **Ending Date**. You can also filter on the selected Price Group Worksheet Lines.

6 Price Checker

The **SD Intelli Pricing Price Checker** is accessed from the **SD Intelli Pricing Role Centre**, by drilling through on the **Price Checker** cue, or, by searching for the **SD Intelli Pricing Price Checker** in the **Tell Me**.

The SD Intelli Pricing Price Checker allows you to check on prices and print a price report for today or for a future date (*Figure 6-1*). The Price Checker finds the lowest price for the customer.



SD Intelli Pricing Price Checker

Process [Reports](#)

Send To Excel Print As Report Send to Email

Hide Options

General

Customer No. 30000 Item Description -

Item No. Item Category Descripti...

Item Category Date 10/04/2021

Customer Name John Haddock Insurance Co.

Price Group Code	Item No. ↑	Item Description	Unit of Measure Code ↑	Starting Date ↑	Ending Date	Unit Price
CONTRACT 1	70001	Base			30/04/2021	40.20
→ CONTRACT 1	70002	Top Panel	PCS	01/04/2021	30/04/2021	28.60
CONTRACT 1	70003	Rear Panel			30/04/2021	29.50
CONTRACT 1	70010	Wooden Door			30/04/2021	52.00
CONTRACT 1	70011	Glass Door		01/04/2021	30/04/2021	72.10

Price Line History

Count Price Used 1

Last Date Price Used 22/04/2021

Count Customers Used 1

Amount Sold(GBP) 22.88

Price Group Details

Price Group Code CONTRACT 1

Linked Customers 1

Price Group Lines 6

Items 5

Figure 6-1

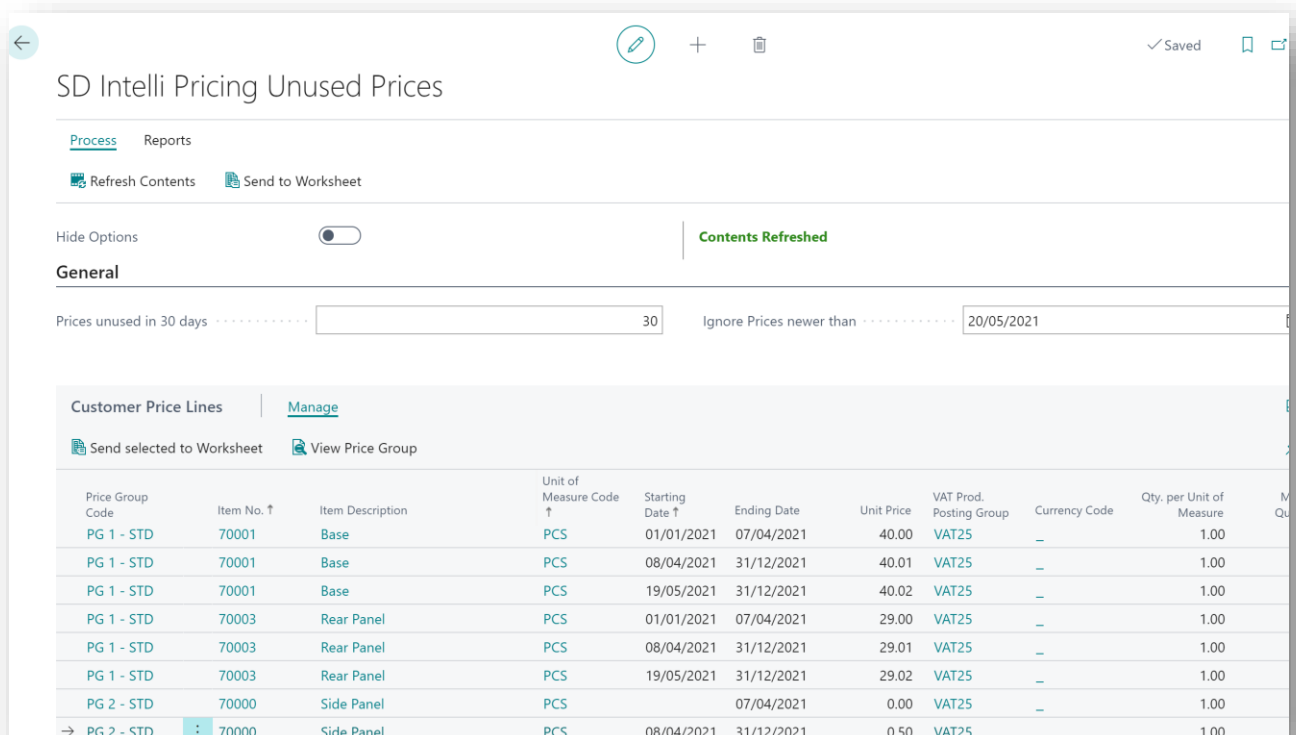
The Price Checker allows you to display prices that have a start date before/including the date entered in Date and an end date after/including the date entered in Date. You can print the results as a report, send to excel or email to a Customer.

7 Unused Prices

The **SD Intelli Pricing Unused Prices** is accessed from the **SD Intelli Pricing Role Centre**, by drilling through on the **Unused Prices** cue, or, by searching for the **SD Intelli Pricing Unused Prices** in the **Tell Me**.

The SD Intelli Pricing Unused Prices allows you to check on prices that have not been used for a certain amount of time. This information can be used to determine whether to retire certain prices that are remaining unused.

In this card (*Figure 7-1*) you can choose to ignore any prices with a start date on the Price Group Line (or Price Group Header if a start date doesn't exist on the Price Group Line) before that entered in the Ignore Prices newer than field.



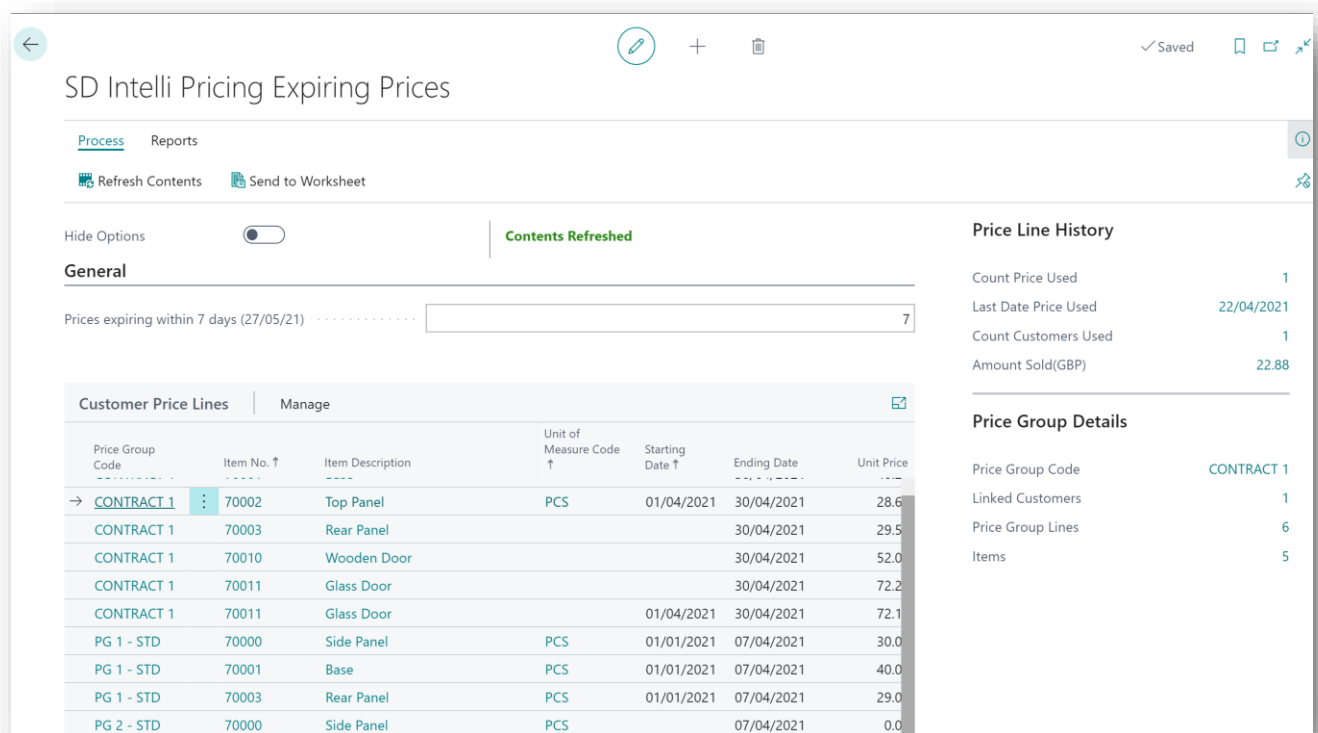
Price Group Code	Item No. ↑	Item Description	Unit of Measure Code ↑	Starting Date ↑	Ending Date	Unit Price	VAT Prod. Posting Group	Currency Code	Qty. per Unit of Measure
PG 1 - STD	70001	Base	PCS	01/01/2021	07/04/2021	40.00	VAT25	-	1.00
PG 1 - STD	70001	Base	PCS	08/04/2021	31/12/2021	40.01	VAT25	-	1.00
PG 1 - STD	70001	Base	PCS	19/05/2021	31/12/2021	40.02	VAT25	-	1.00
PG 1 - STD	70003	Rear Panel	PCS	01/01/2021	07/04/2021	29.00	VAT25	-	1.00
PG 1 - STD	70003	Rear Panel	PCS	08/04/2021	31/12/2021	29.01	VAT25	-	1.00
PG 1 - STD	70003	Rear Panel	PCS	19/05/2021	31/12/2021	29.02	VAT25	-	1.00
PG 2 - STD	70000	Side Panel	PCS		07/04/2021	0.00	VAT25	-	1.00
→ PG 2 - STD	70000	Side Panel	PCS	08/04/2021	31/12/2021	0.50	VAT25	-	1.00

Figure 7-1

8 Expiring Prices

The **SD Intelli Pricing Expiring Prices** is accessed from the **SD Intelli Pricing Role Centre**, by drilling through on the **Expiring Prices** cue, or, by searching for the **SD Intelli Pricing Expiring Prices** in the **Tell Me**.

The SD Intelli Pricing Expiring Prices allows you to check on prices due to expire soon with no new prices entered on the Price Group Lines (*Figure 8-1*).



The screenshot displays the 'SD Intelli Pricing Expiring Prices' interface. At the top, there are navigation icons (back, edit, add, delete) and a 'Saved' status. Below the title, there are tabs for 'Process' and 'Reports', and buttons for 'Refresh Contents' and 'Send to Worksheet'. A 'Hide Options' toggle is set to 'off', and a green notification 'Contents Refreshed' is visible.

The 'General' section shows a filter for 'Prices expiring within 7 days (27/05/21)' with a value of '7' entered in the input field.

The main data is presented in a table titled 'Customer Price Lines' with a 'Manage' link. The table has the following columns: Price Group Code, Item No. ↑, Item Description, Unit of Measure Code ↑, Starting Date ↑, Ending Date, and Unit Price. The first row is highlighted in blue.

Price Group Code	Item No. ↑	Item Description	Unit of Measure Code ↑	Starting Date ↑	Ending Date	Unit Price
→ CONTRACT 1	70002	Top Panel	PCS	01/04/2021	30/04/2021	28.6
CONTRACT 1	70003	Rear Panel			30/04/2021	29.5
CONTRACT 1	70010	Wooden Door			30/04/2021	52.0
CONTRACT 1	70011	Glass Door			30/04/2021	72.2
CONTRACT 1	70011	Glass Door		01/04/2021	30/04/2021	72.1
PG 1 - STD	70000	Side Panel	PCS	01/01/2021	07/04/2021	30.0
PG 1 - STD	70001	Base	PCS	01/01/2021	07/04/2021	40.0
PG 1 - STD	70003	Rear Panel	PCS	01/01/2021	07/04/2021	29.0
PG 2 - STD	70000	Side Panel	PCS		07/04/2021	0.0

On the right side, there are two summary sections: 'Price Line History' and 'Price Group Details'. The 'Price Line History' section shows: Count Price Used (1), Last Date Price Used (22/04/2021), Count Customers Used (1), and Amount Sold(GBP) (22.88). The 'Price Group Details' section shows: Price Group Code (CONTRACT 1), Linked Customers (1), Price Group Lines (6), and Items (5).

Figure 8-1

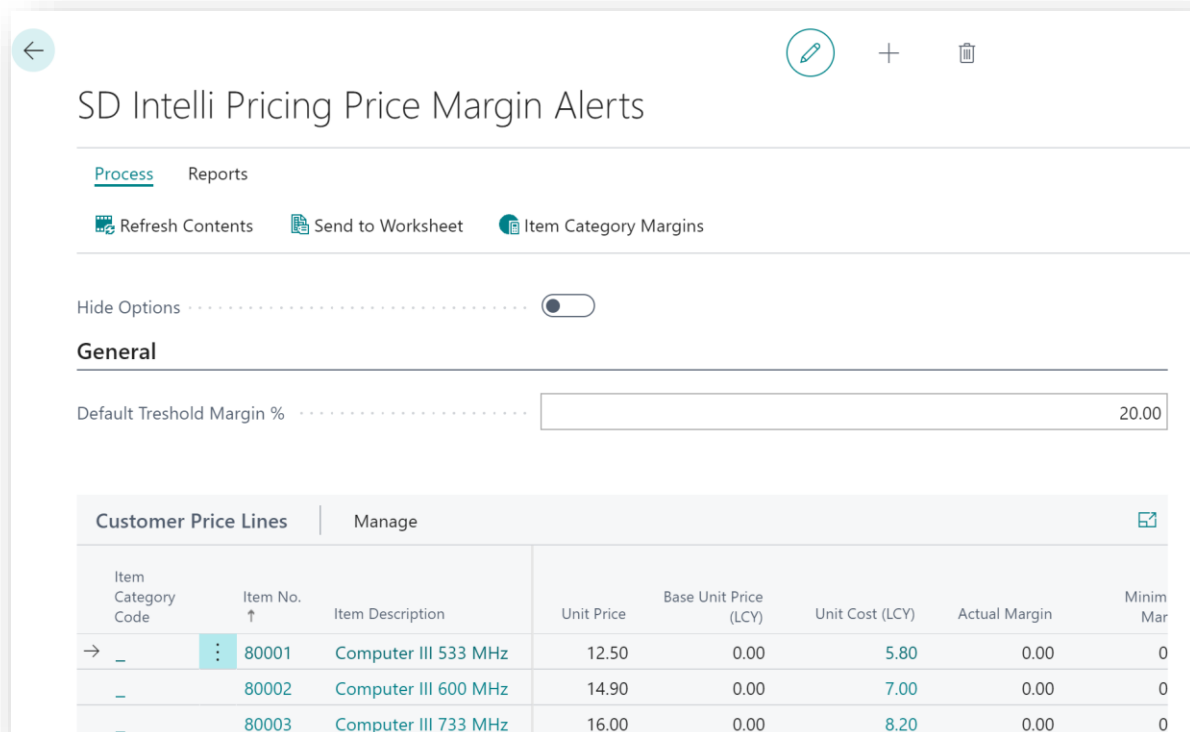
9 Margin Alerts

The **SD Intelli Pricing Margin Alerts** is accessed from the **SD Intelli Pricing Role Centre**, by drilling through on the **Margin Alerts** cue, or, by searching for the **SD Intelli Pricing Margin Alerts** in the **Tell Me**.

The SD Intelli Pricing Margin Alerts loops through enabled price book lines (that have an ending date either blank or in the future) and calculates a "Base Unit Price (LCY)" for the Price Group Line Base Unit of Measure Price (Unit Price/Qty. Per Unit of Measure).

The "Unit Cost (LCY)" is calculated from the price group, and the Profit Margin is calculated ("Base Unit Price (LCY)" - "Unit Cost (LCY)") / "Base Unit Price (LCY)" * 100).

If the Profit Margin is less than the Margin Threshold % for the Item Category Code, then this is displayed in the Margin Alerts cue (*Figure 9-1*).



SD Intelli Pricing Price Margin Alerts

Process Reports

Refresh Contents Send to Worksheet Item Category Margins

Hide Options

General

Default Treshold Margin %

Customer Price Lines		Manage						
Item Category Code	Item No.	Item Description	Unit Price	Base Unit Price (LCY)	Unit Cost (LCY)	Actual Margin	Minim Mar	
→ -	80001	Computer III 533 MHz	12.50	0.00	5.80	0.00	0	
-	80002	Computer III 600 MHz	14.90	0.00	7.00	0.00	0	
-	80003	Computer III 733 MHz	16.00	0.00	8.20	0.00	0	

Figure 9-1

10 Uninstalling SD Intelli Pricing

You can uninstall **SD Intelli Pricing** using the Web Client:

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (Figure 10-1).

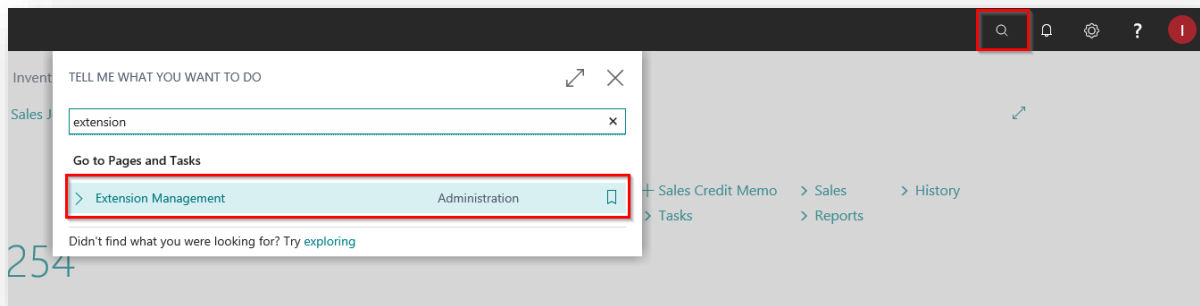


Figure 10-1

2. In **Extension Management**, you should see the **SD Intelli Pricing** App installed.
3. Select the **SD Intelli Pricing** App and choose the **Uninstall** Action (Figure 10-2).

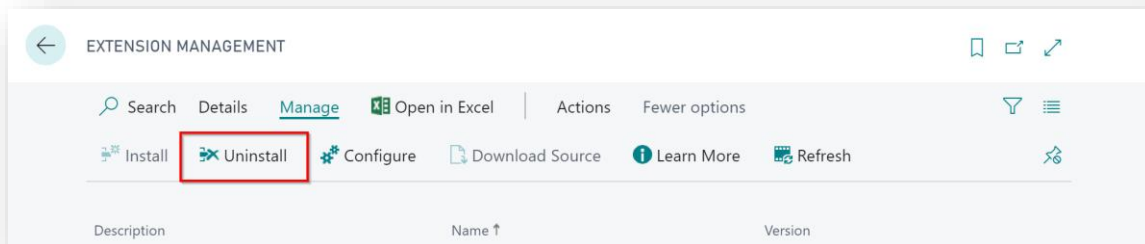


Figure 10-2



Dynamics Shop

IT Simply Makes Business Sense with Microsoft Dynamics 365



Simply Dynamics has been delivering complex and custom Dynamics 365 Projects and Support since 2007. Now servicing clients in over 18 countries.



DynamicsShop delivers Dynamics 365 enhancements through App's and as SAAS solutions to bring next level automation to your Dynamics 365 Solution.



DynAzure delivers cloud only, low cost & standardised model rapid deployment Dynamics 365 Projects and support utilising standard features and enhanced Apps.

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Citywest Business Campus,
Dublin, D24 H972, Ireland

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