



Dynamics
Shop

User Guide for Microsoft Dynamics 365 Business Central

Product: SD Intelli Pricing

Release: D365 BC V21+

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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).

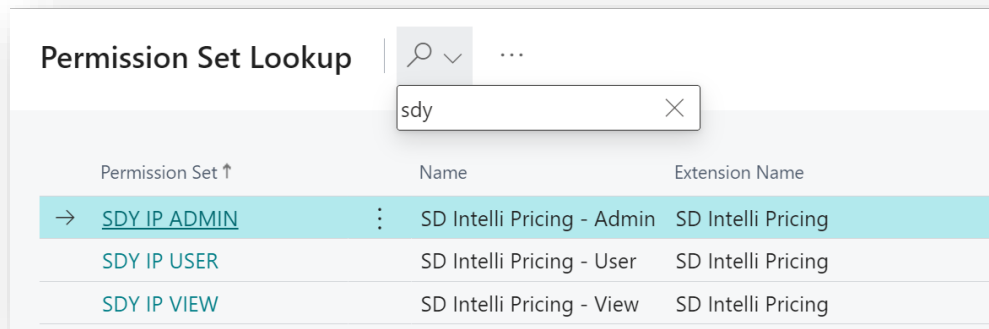
Price Groups are defined in SD Intelli Pricing as either 1-Standard (Normal Price Group), 2-Contract (Contract Price Group) or 3-Listed (Listed Price Group).

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.

3 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

4 Installing SD Intelli Pricing

To install **SD Intelli Pricing** from the Business Administration Shell:

1. Run the **Business Central Administration Shell** as **Administrator**.
2. To publish the extension from the package file (.app), use the **Publish-NAVApp cmdlet**.

Example:

```
Publish-NAVApp -ServerInstance BC190 -Path "C:\Users\name\Downloads\Simply Dynamics Ltd_SD Intelli Pricing_2.1.0.0.app"
```

3. To synchronise the schema changes, use the **Sync-NAVApp cmdlet**.

Example:

```
Sync-NavApp -ServerInstance BC190 -Name "SD Intelli Pricing"
```

4. To install the published NAV App, use the **Install-NAVApp cmdlet**.

Example:

```
Install-NAVApp -ServerInstance BC190 -Name "SD Intelli Pricing"
```

5. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (Figure 4-1).

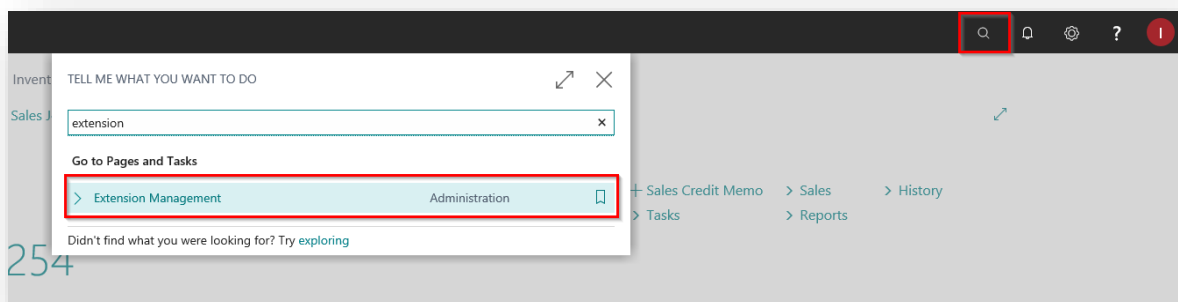


Figure 4-1

6. In the **Extension Management** list, you should see the **SD Intelli Pricing App** installed.

4.1 Allowing HttpClient Requests in SD Intelli Pricing

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

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (Figure 4-2).

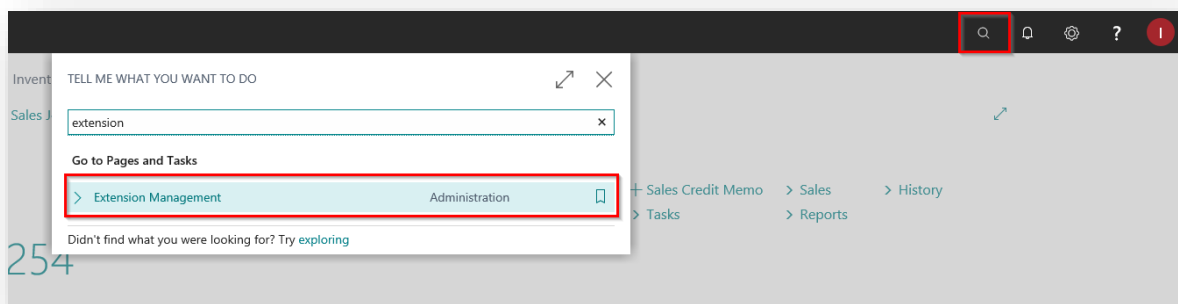
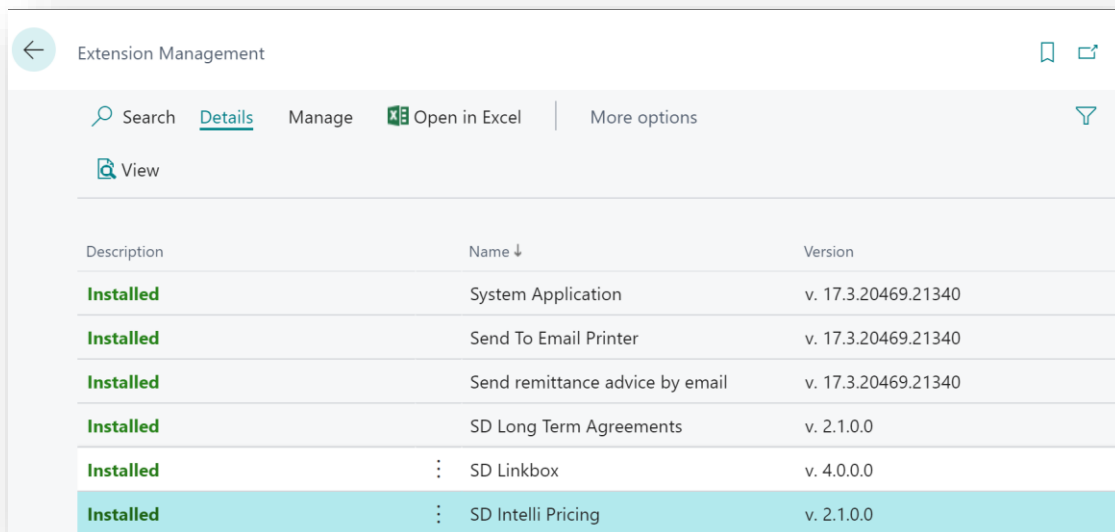


Figure 4-2

2. In the **Extension Management** list, you should see the **SD Intelli Pricing** App installed (Figure 4-3).



Description	Name ↓	Version
Installed	System Application	v. 17.3.20469.21340
Installed	Send To Email Printer	v. 17.3.20469.21340
Installed	Send remittance advice by email	v. 17.3.20469.21340
Installed	SD Long Term Agreements	v. 2.1.0.0
Installed	SD Linkbox	v. 4.0.0.0
Installed	SD Intelli Pricing	v. 2.1.0.0

Figure 4-3

3. Select the **SD Intelli Pricing** App record and from the menu, select the **Manage** group, and choose **Configure** (Figure 4-4).

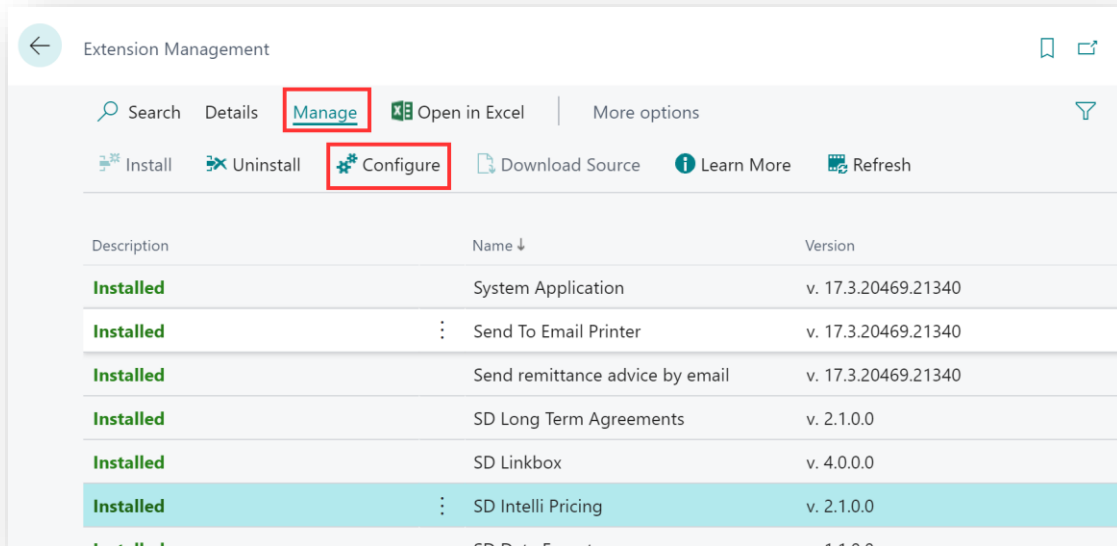


Figure 4-4

4. Choose to allow the **Allow HttpClient Requests** option (Figure 4-5).

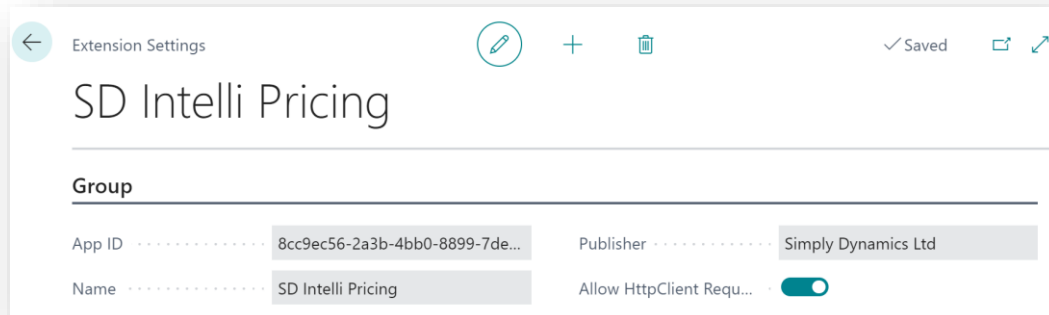


Figure 4-5

4.2 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 4-6).

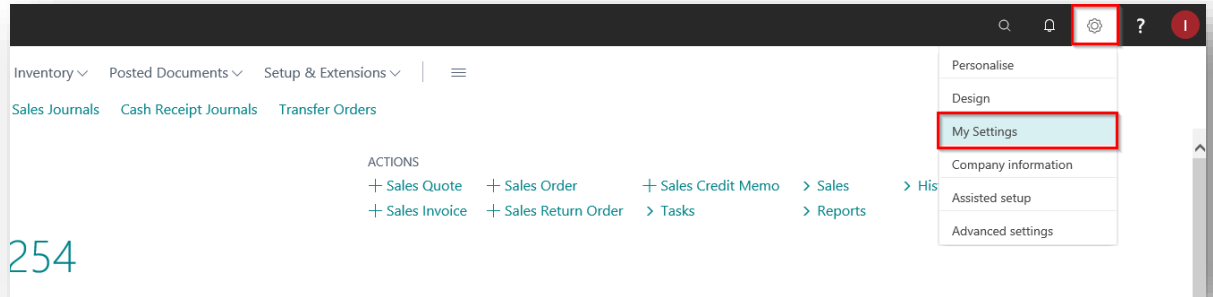


Figure 4-6

2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon (Figure 4-7).

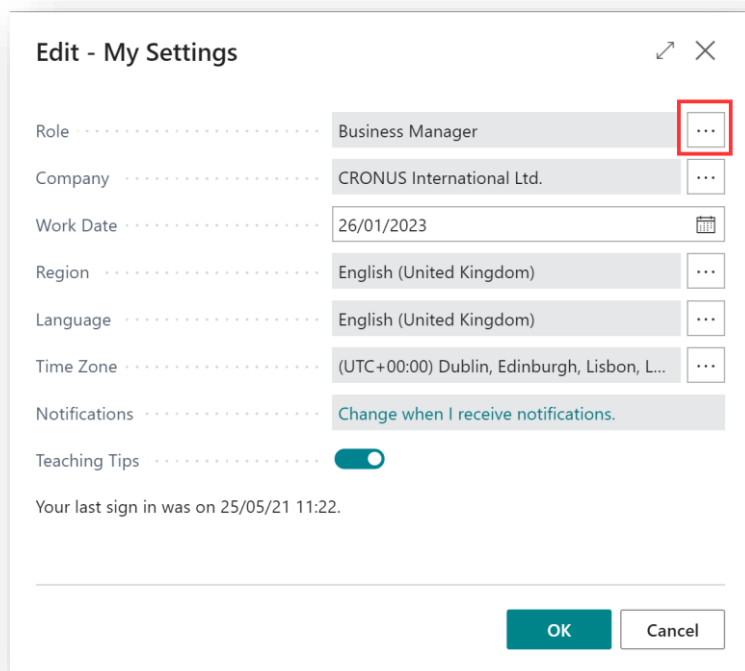


Figure 4-7

3. You should see **SD Intelli Pricing** in the list of Roles (Figure 4-8).

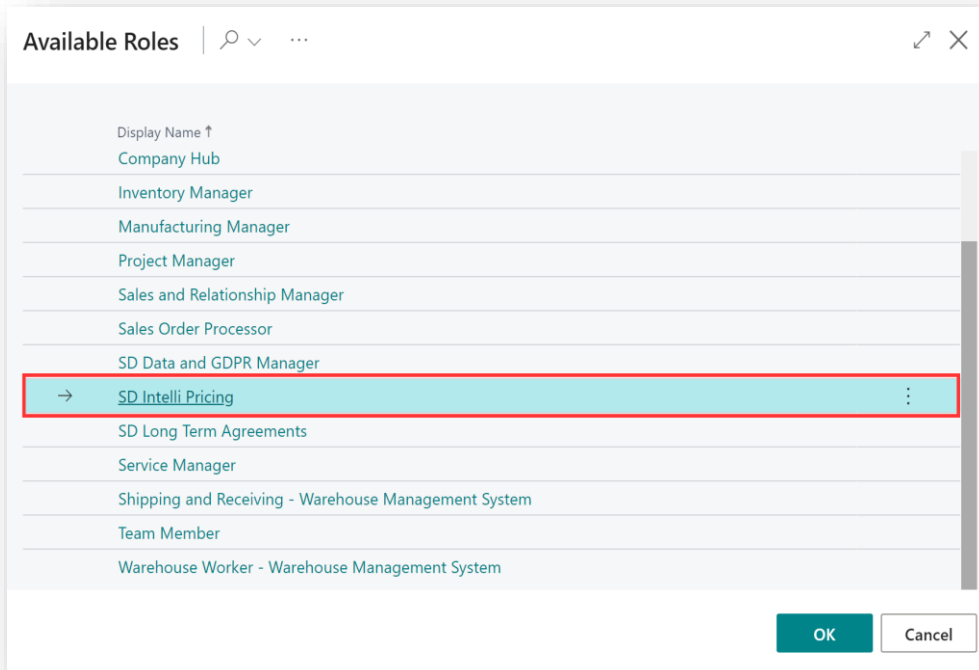


Figure 4-8

4. Choose **SD Intelli Pricing** and click **OK**.
5. The **SD Intelli Pricing** Role should now be displayed in the **Role** field (Figure 4-9).

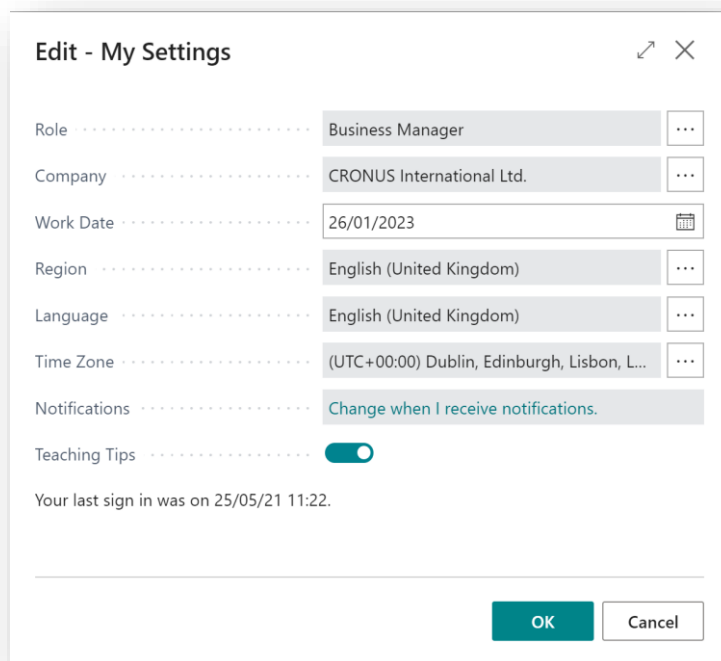


Figure 4-9

4.3 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 4-10*).

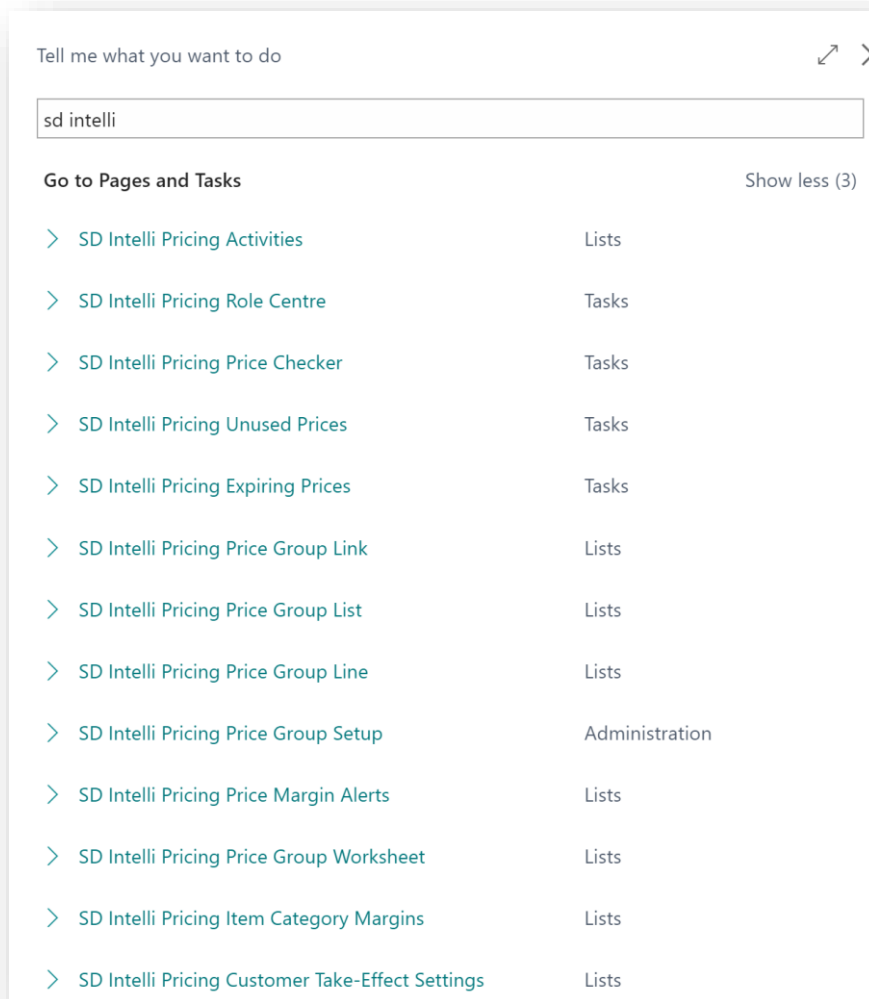


Figure 4-10

4.4 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** page.
2. When the **SD Intelli Pricing Setup** page opens, you are prompted that “Your license is invalid”. Choose **OK** (Figure 4-11).

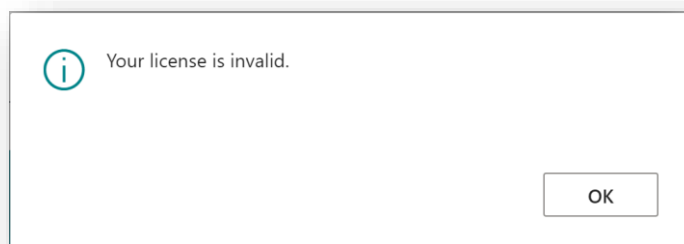


Figure 4-11

3. You are then prompted that “Your SD Intelli Pricing license needs to be validated”. Choose **Yes** (Figure 4-12).

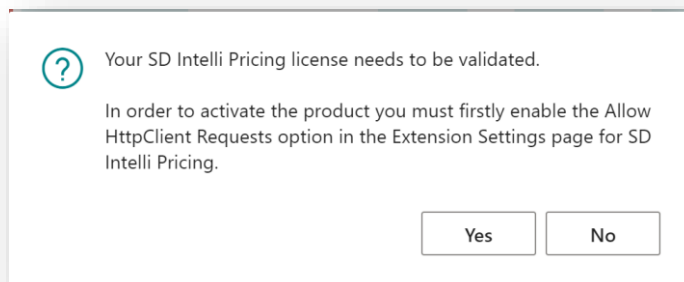


Figure 4-12

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

4.4.1 Activating the SD Intelli Pricing Licence with a Product Key

In the **Activate your Product** page:

1. Enter your company name in **Company Name**
2. Enter your company email in **Email**
3. 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.** (Figure 4-13)

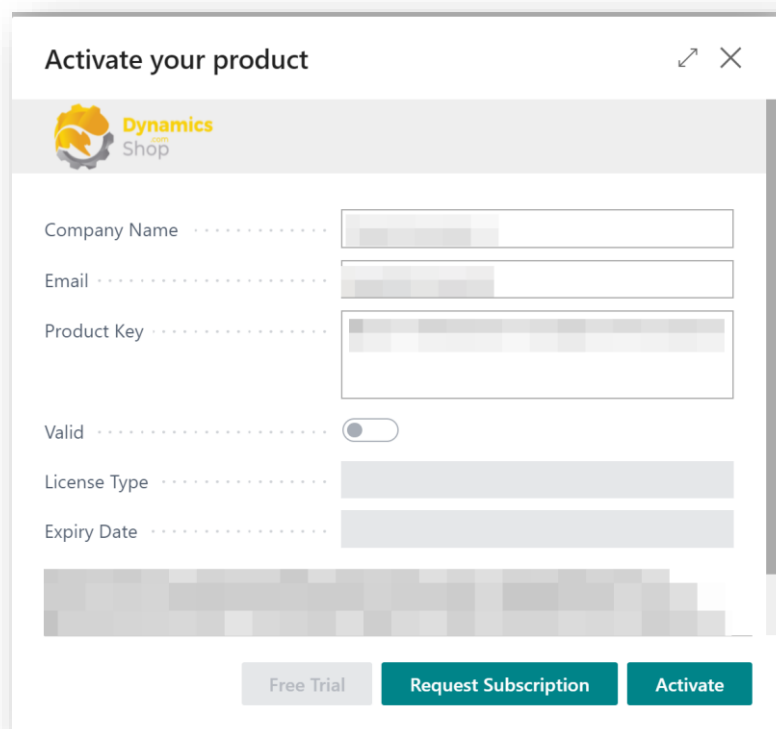
The screenshot shows a web form titled "Activate your product" with a Dynamics Shop logo. The form contains several input fields: "Company Name", "Email", "Product Key", "Valid" (a toggle switch), "License Type", and "Expiry Date". At the bottom, there are three buttons: "Free Trial", "Request Subscription", and "Activate". The "Product Key" field is highlighted with a dashed border, indicating it is the active field.

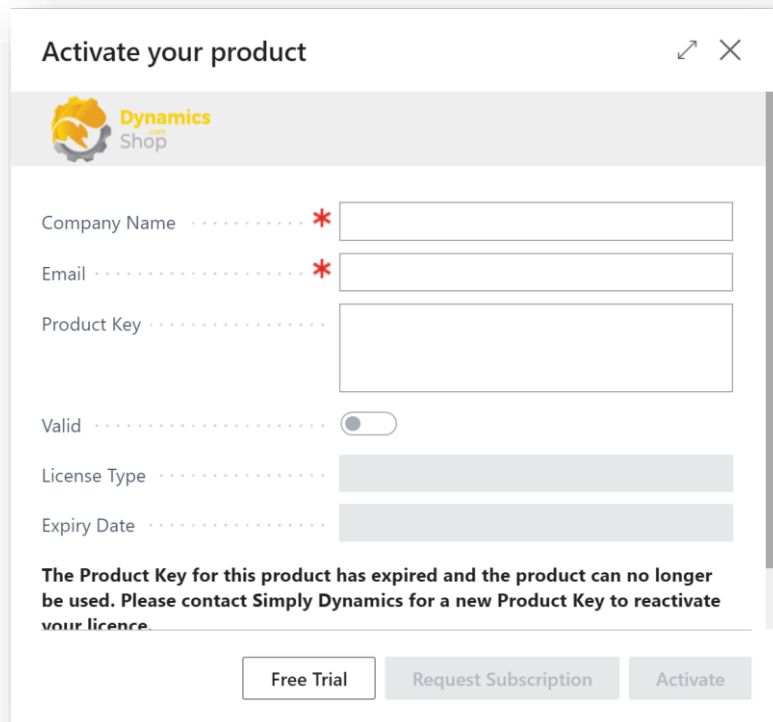
Figure 4-13

4. Choose **Activate**.
5. 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.


4.4.2 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 free trial, in the **Activate your Product** page:

1. Enter your company name in **Company Name**
2. Enter your company email in **Email**
3. Choose **Free Trial** (Figure 4-14).



Activate your product

 Dynamics Shop

Company Name *

Email *

Product Key

Valid ☐

License Type

Expiry Date

The Product Key for this product has expired and the product can no longer be used. Please contact Simply Dynamics for a new Product Key to reactivate your licence.

Free Trial Request Subscription Activate

Figure 4-14

4. You are then prompted to choose **Yes** to activate your free trial. Choose **Yes** (Figure 4-15).

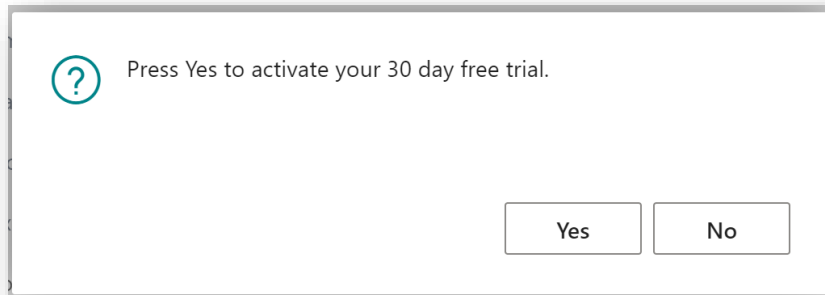


Figure 4-15

5. 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 4-16).

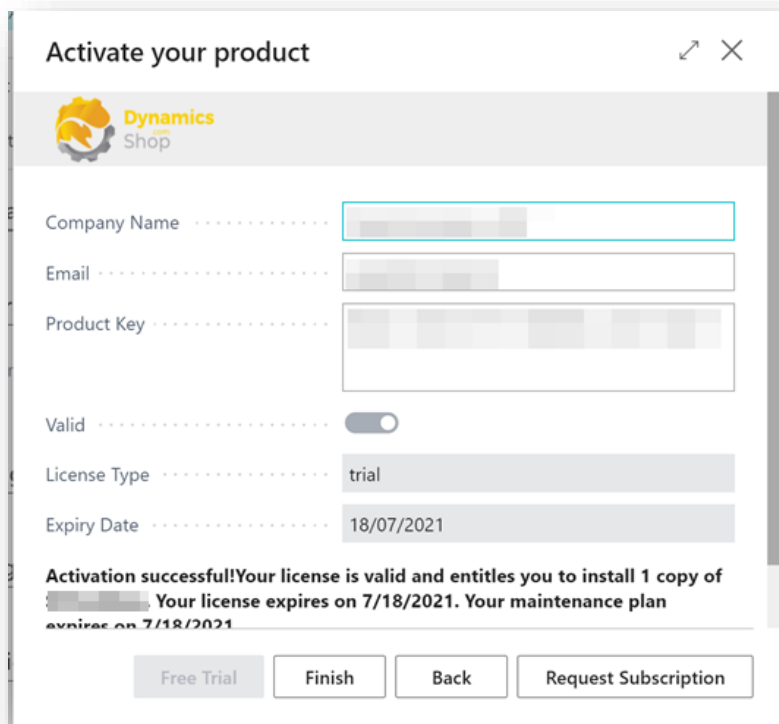


Figure 4-16

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

5 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 5-1).

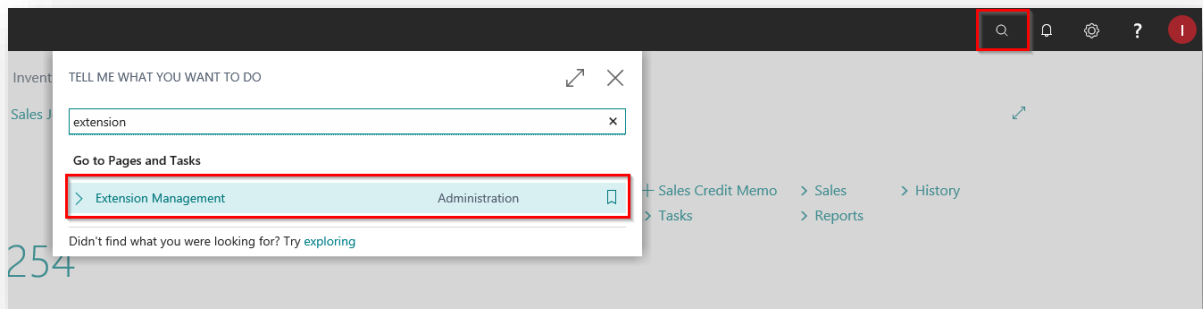


Figure 5-1

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 5-2).

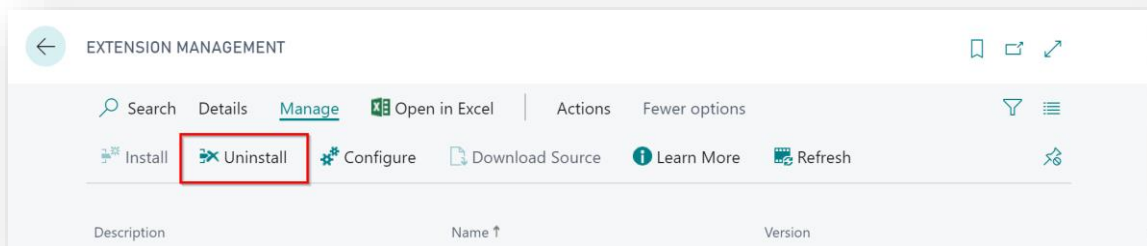


Figure 5-2

6 Setup and Configuration

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.

1. From the menu choose the **Process** group, and then **Assisted Setup** (Figure 6-1).

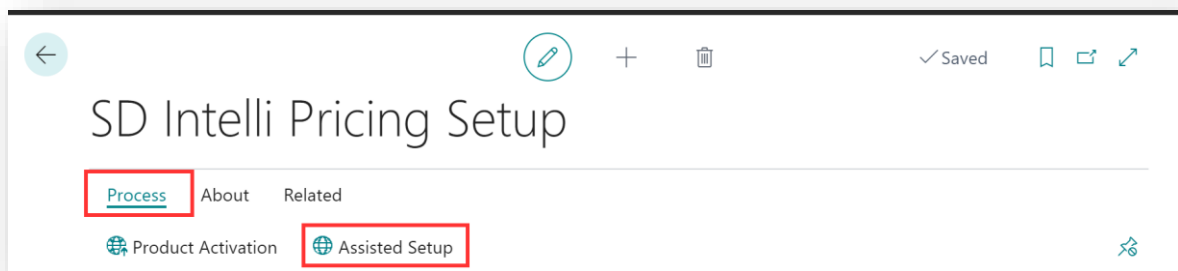


Figure 6-1

2. You are prompted that “Importing setup will delete all of the existing data in SD Intelli Pricing. Press **Yes** to proceed.” Choose **Yes** if this is your first time to use SD Intelli Pricing and you have not already created any setup in SD Intelli Pricing (Figure 6-2).

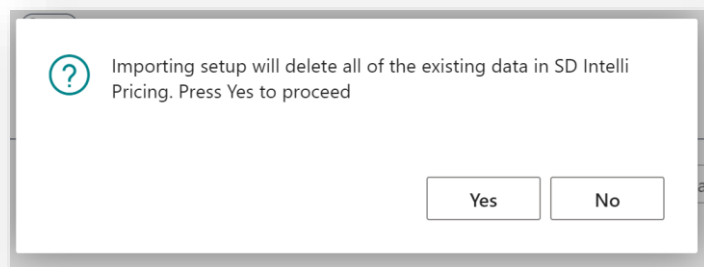


Figure 6-2

3. You are then prompted, “Are you sure?” Choose **Yes** (Figure 6-3).

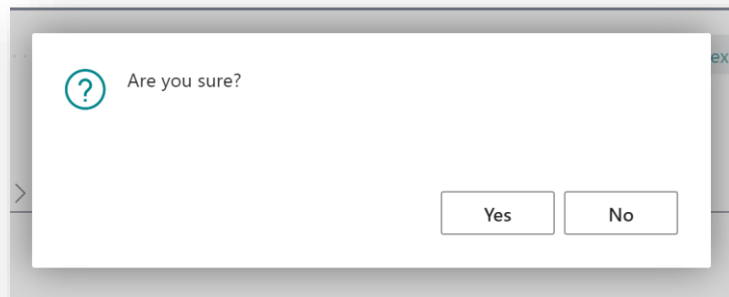


Figure 6-3

4. You will then receive a prompt like the below that the default setup has imported. Choose OK (Figure 6-4).

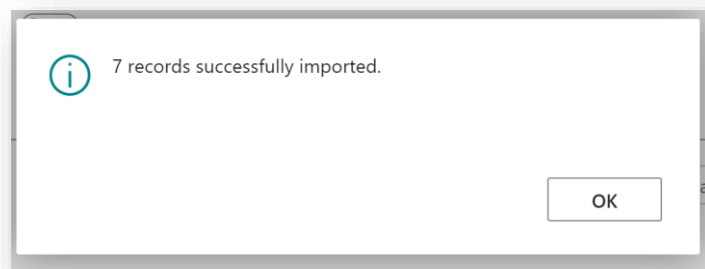


Figure 6-4

7 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.

7.1 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) or 3-Listed (Listed Price Group).

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 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.

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.

7.2 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.

8 Using SD Intelli Pricing

8.1 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 the **SD Intelli Pricing Setup** page 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 8-1*):

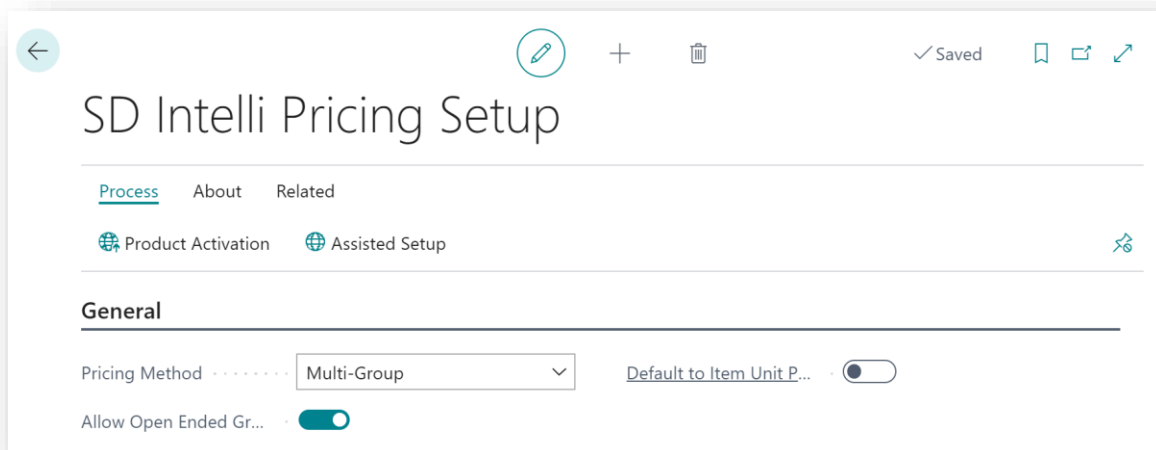


Figure 8-1

- **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 wish 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 8-2*):

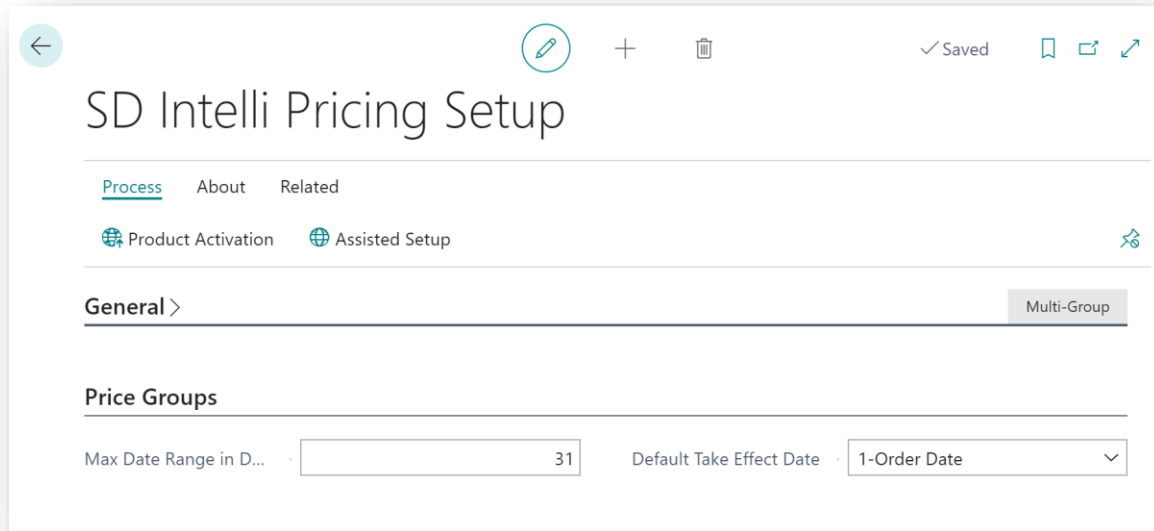


Figure 8-2

- **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**.

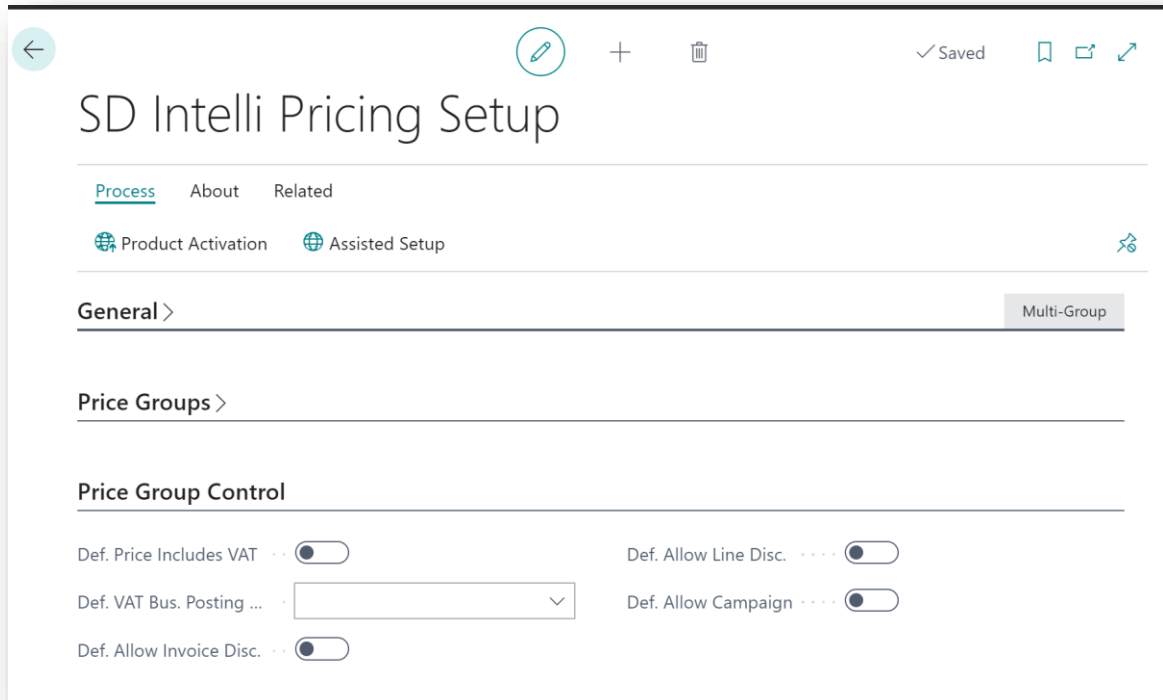
1-Order Date - price determined by the Order Date on the document.

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 8-3):



The screenshot shows the 'SD Intelli Pricing Setup' window. At the top, there are navigation icons (back, edit, add, delete) and a 'Saved' status. Below the title, there are tabs for 'Process', 'About', and 'Related'. Under 'Process', there are icons for 'Product Activation' and 'Assisted Setup'. The main section is titled 'General' and includes a 'Multi-Group' button. Below this is the 'Price Groups' section. The 'Price Group Control' section contains five settings: 'Def. Price Includes VAT' (toggle), 'Def. VAT Bus. Posting Gr.' (dropdown), 'Def. Allow Invoice Disc.' (toggle), 'Def. Allow Line Disc.' (toggle), and 'Def. Allow Campaign' (toggle). All toggle switches are currently turned on.

Figure 8-3

- **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 8-4*):

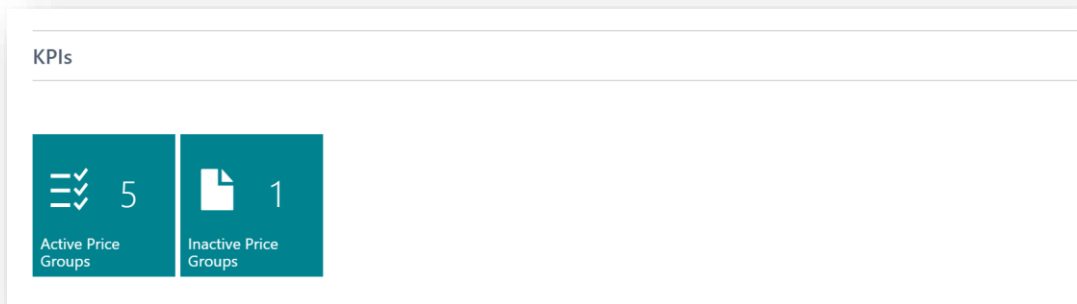


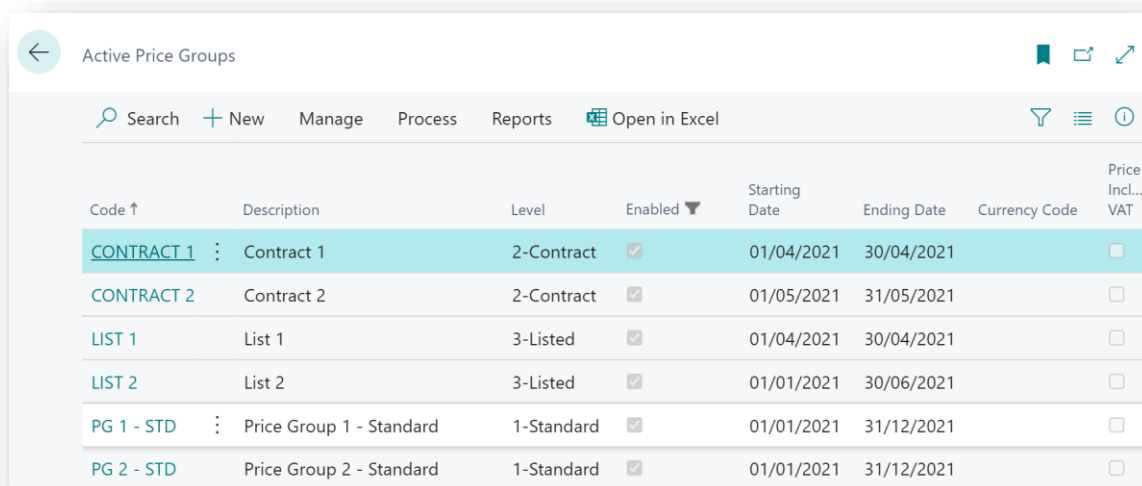
Figure 8-4

- **Active Price Groups** – A flowfield count of active Price Groups in SD Intelli Pricing.
- **Inactive Price Groups** – A flowfield count of the inactive Price Groups in SD Intelli Pricing.

8.2 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 8-5*):



Code ↑	Description	Level	Enabled ▼	Starting Date	Ending Date	Currency Code	Price Incl... VAT
CONTRACT 1	Contract 1	2-Contract	<input checked="" type="checkbox"/>	01/04/2021	30/04/2021		<input type="checkbox"/>
CONTRACT 2	Contract 2	2-Contract	<input checked="" type="checkbox"/>	01/05/2021	31/05/2021		<input type="checkbox"/>
LIST 1	List 1	3-Listed	<input checked="" type="checkbox"/>	01/04/2021	30/04/2021		<input type="checkbox"/>
LIST 2	List 2	3-Listed	<input checked="" type="checkbox"/>	01/01/2021	30/06/2021		<input type="checkbox"/>
PG 1 - STD	Price Group 1 - Standard	1-Standard	<input checked="" type="checkbox"/>	01/01/2021	31/12/2021		<input type="checkbox"/>
PG 2 - STD	Price Group 2 - Standard	1-Standard	<input checked="" type="checkbox"/>	01/01/2021	31/12/2021		<input type="checkbox"/>

Figure 8-5

The following actions are available in the **New** and **Manage** group in the **SD Intelli Pricing Price Group List** (*Figure 8-6*):

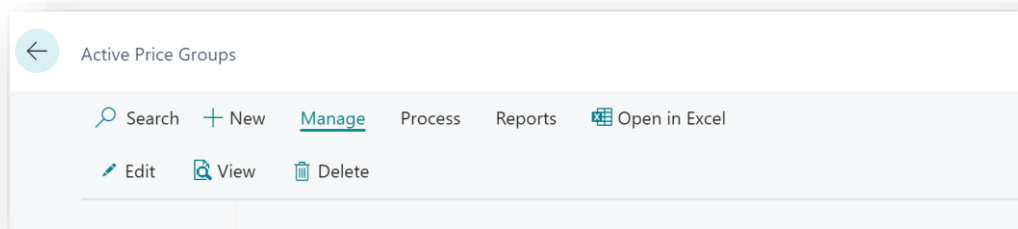


Figure 8-6

- **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.

8.3 The Price Group Card

The **SD Intelli Pricing Price Group Card** displays the following fields in the **General** FastTab (Figure 8-7):

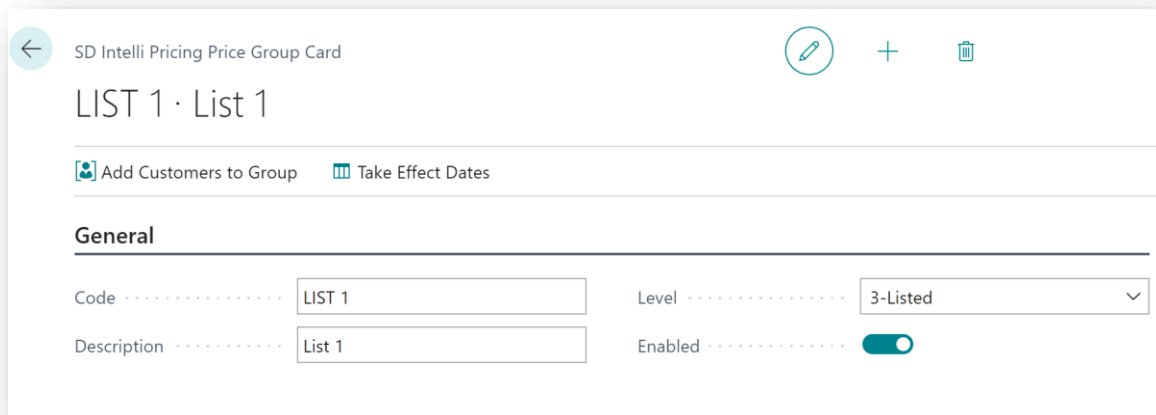


Figure 8-7

- **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, or a Listed Price Group. Options are **1 – Standard**, **2 – Contract** or **3 – Listed**.
 - 1 - Standard** - this Price Group is a Standard Price Group.
 - 2 - Contract** - this Price Group is a Contract Price Group.
 - 3 – Listed** – this Price Group is a Listed Price Group

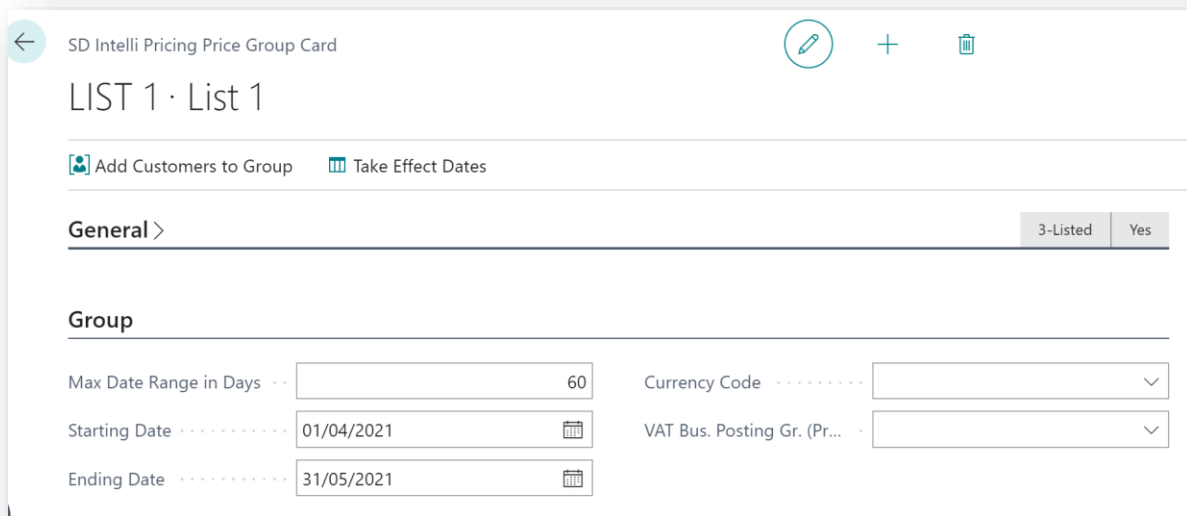
If a customer has been linked to a Listed Price Group, then only the items on the Listed Price Group can be added to a Sales Line. Users are prevented from adding items to the Sales Line that are not defined on the Listed Price Group. The price on the sales line defaults to that from the Listed Price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

In SD Intelli Pricing, Contract pricing overrides Standard pricing.



- **Enabled** - Select this checkbox to enable the Price Group.

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



SD Intelli Pricing Price Group Card


LIST 1 · List 1

 Add Customers to Group  Take Effect Dates

General > 3-Listed Yes

Group

Max Date Range in Days Currency Code

Starting Date  VAT Bus. Posting Gr. (Price)


Ending Date 

Figure 8-8

- **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.

The following fields exist in the **Control** FastTab (*Figure 8-9*):

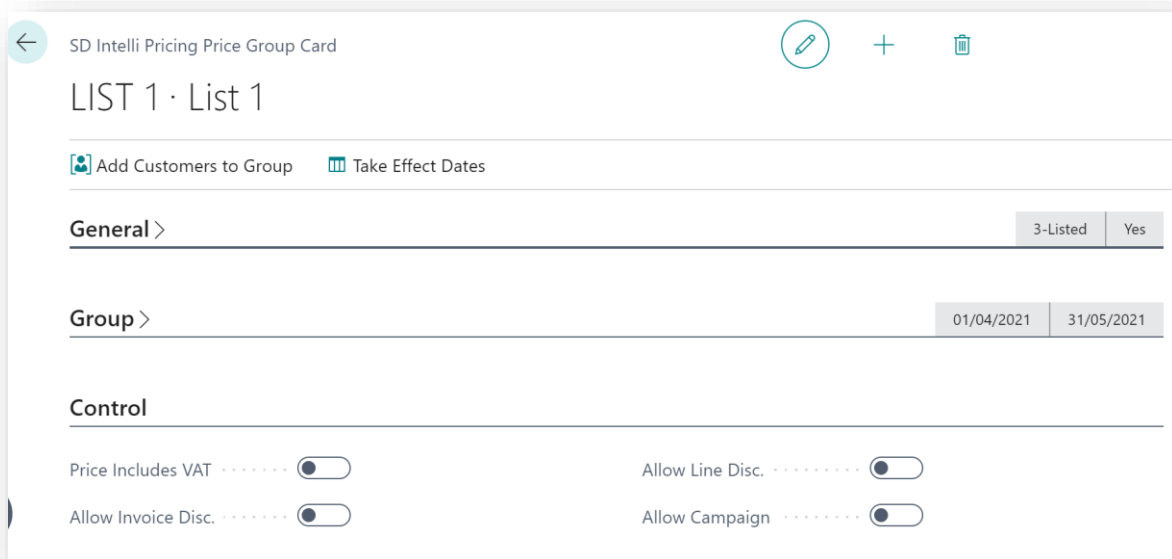


Figure 8-9

- **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.

Expand the **Price Group Lines** FastTab (*Figure 8-10*):



Price Group Lines		Manage							
Item No. ↑	Item Description	Unit of Measure Code ↑	Minimum Quantity ↑	Item Unit Price	Unit Price	Starting Date ↑	Ending Date	V	
→ 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		
1924-W	CHAMONIX Base Storage Unit	PCS	0.00	136.40	136.00	01/04/2021	31/05/2021		

Figure 8-10

- **Item No.** - Enter the Item No. that you want to set a price for in the Price Group.
- **Item Description** - Displays the description of the Item chosen in **Item No.**
- **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.

The following actions are available on the Price Group Card (*Figure 8-11*):

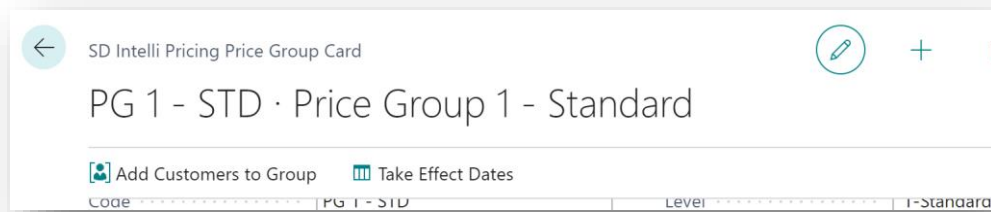


Figure 8-11

- **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.

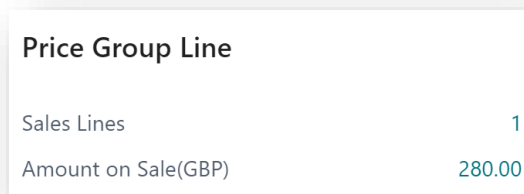
There are three FactBoxes on this page that supply additional information for the Price Group. The Price Group Details FactBox displays the following fields (*Figure 8-12*):

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

Figure 8-12

- **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 Group Line FactBox displays the following fields (*Figure 8-13*):

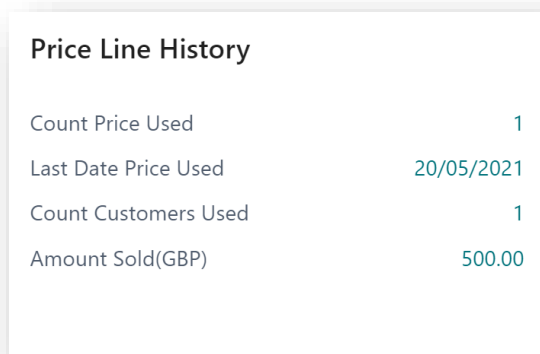


Price Group Line	
Sales Lines	1
Amount on Sale(GBP)	280.00

Figure 8-13

- **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 Group Line FactBox displays the following fields (*Figure 8-14*):



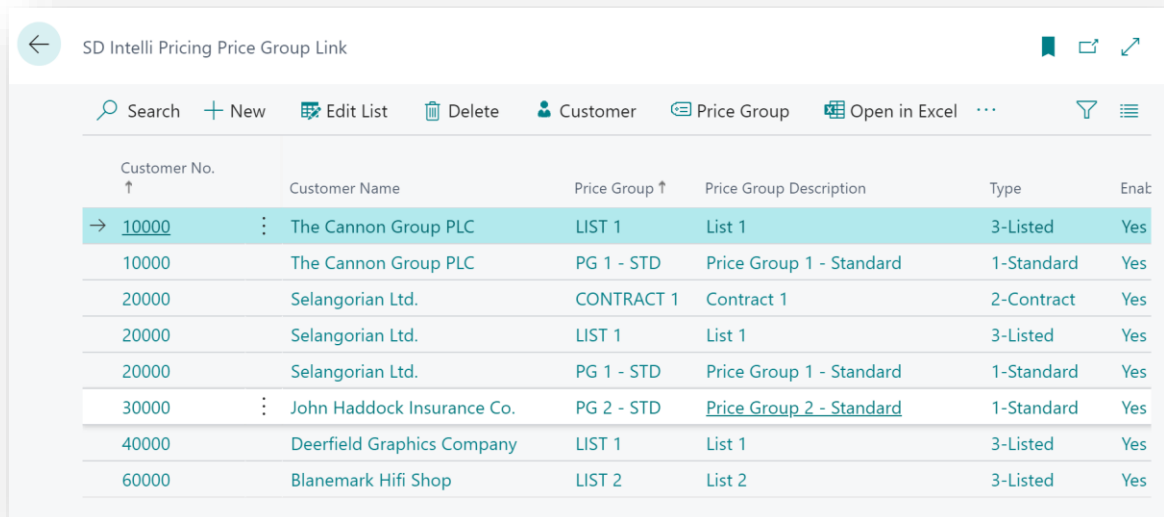
Price Line History	
Count Price Used	1
Last Date Price Used	20/05/2021
Count Customers Used	1
Amount Sold(GBP)	500.00

Figure 8-14

-
- **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.

8.4 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 8-15*):



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	<u>Price Group 2 - Standard</u>	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 8-15

- **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. Options are **1 - Standard**, **2 – Contract**, **3-Listed**.
- **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 8-16*):

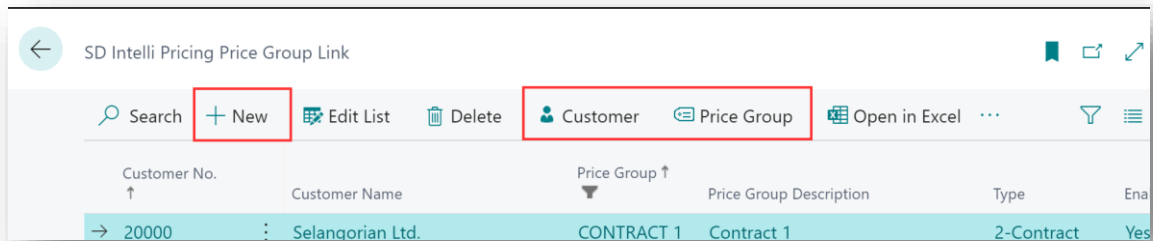
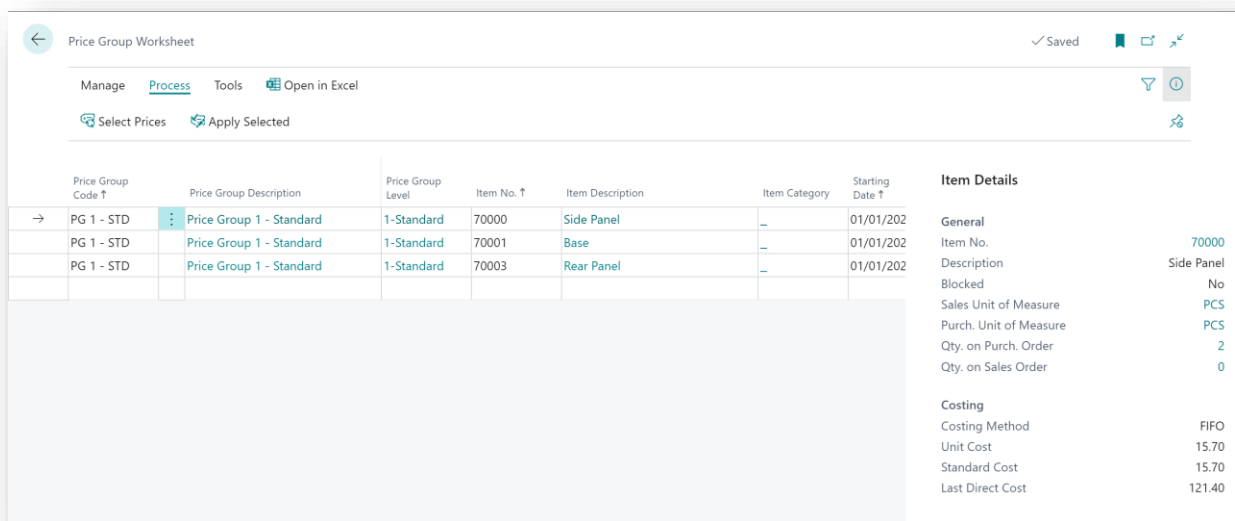


Figure 8-16

- **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.

8.5 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 8-17).



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	—	01/01/2022	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	—	01/01/2022	
PG 1 - STD	Price Group 1 - Standard	1-Standard	70003	Rear Panel	—	01/01/2022	

Figure 8-17

- **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 8-18):

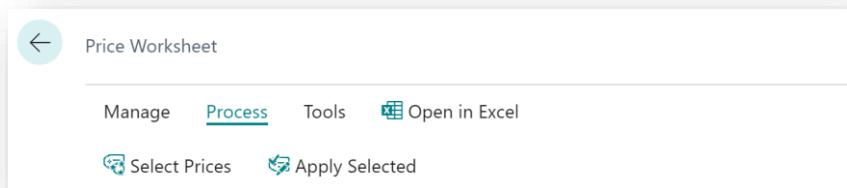


Figure 8-18

- **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 8-19):

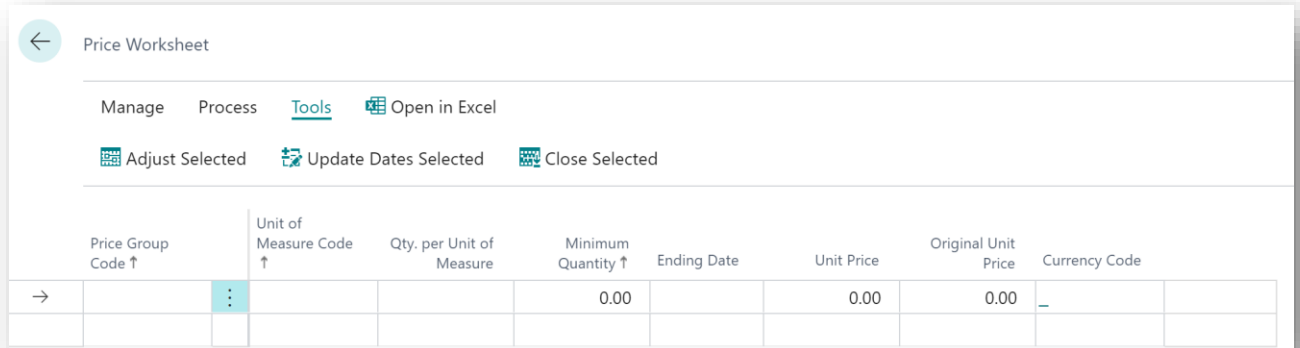


Figure 8-19

- **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**.

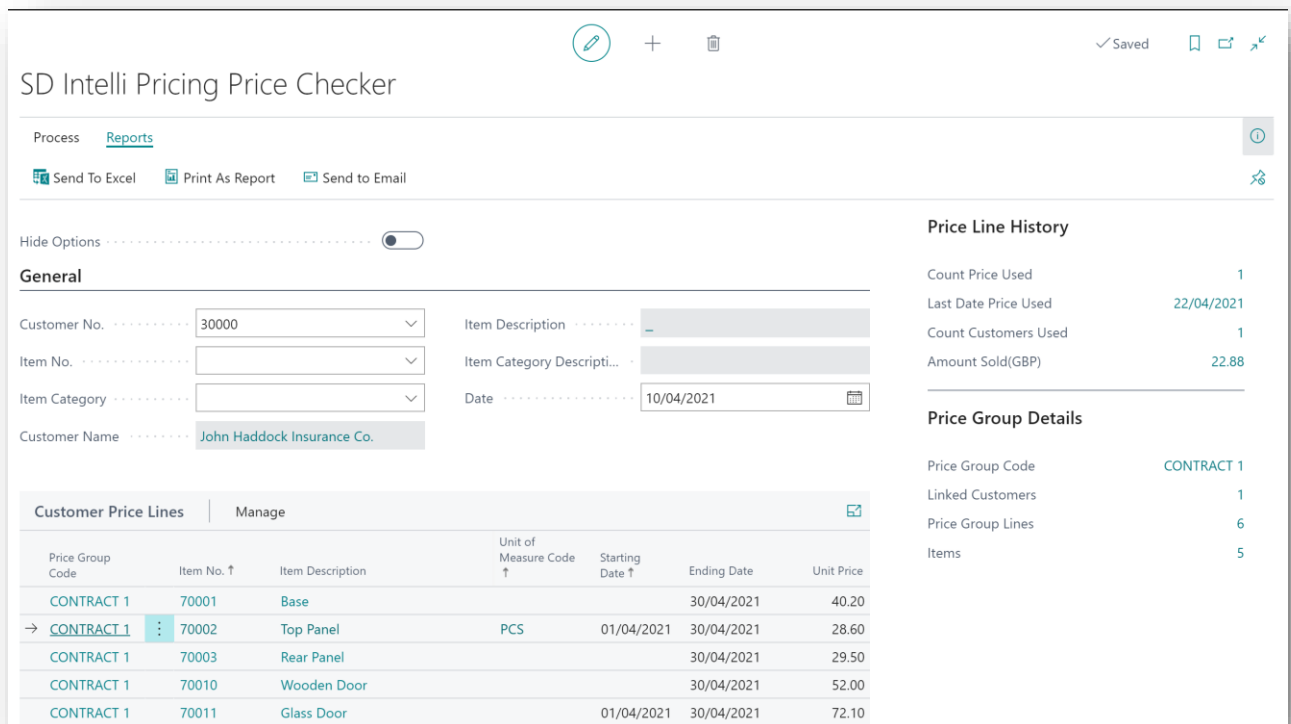
Enter the value in the **Adjustment Value**, and a value to round the Adjustment Value to, in the **Round To** field. You can also filter on the selected Price Group Worksheet Lines.

- **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.

9 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 9-1*). 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 Description -

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 9-1

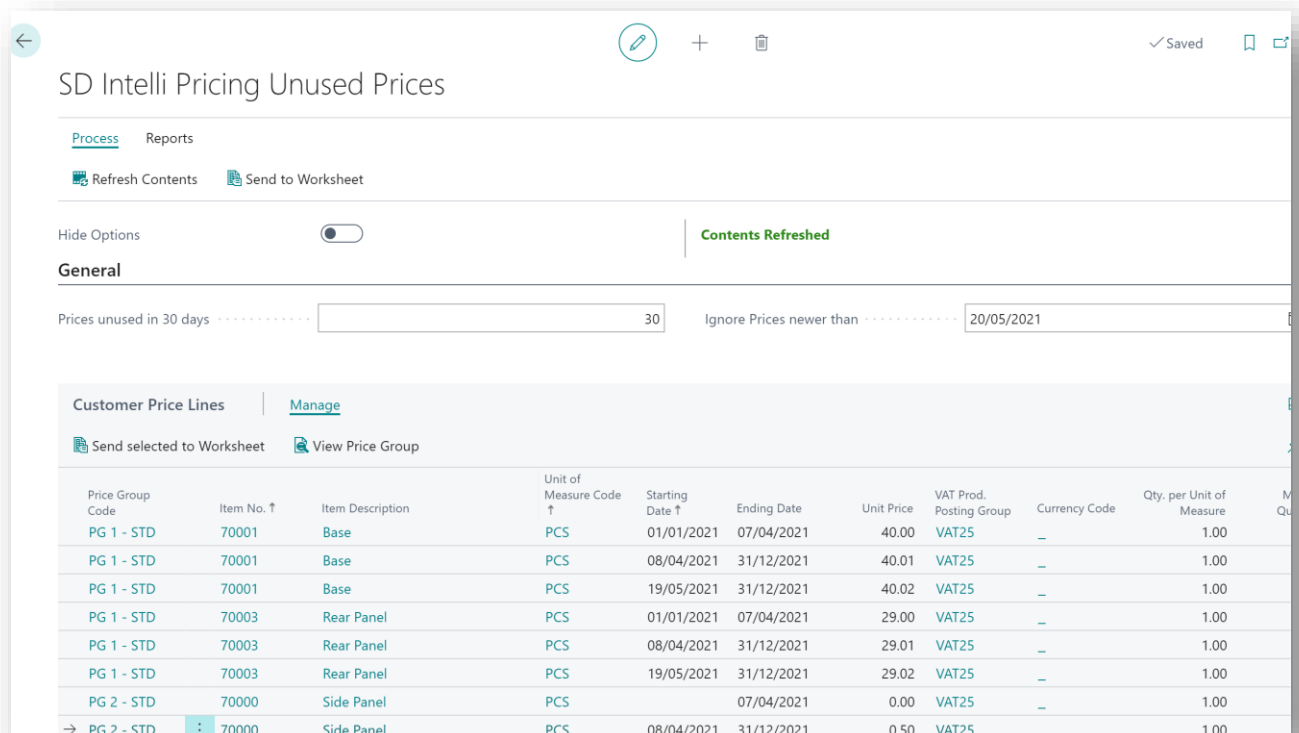
The Price Checker allows you to display prices that have a start date before/including the date entered in Date and an end date after/including the date entered in Date. You can print the results as a report, send to excel or email to a Customer.

10 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 (*Figure 10-1*).

In this card 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.



SD Intelli Pricing Unused Prices

Process Reports

Refresh Contents Send to Worksheet

Hide Options ☐ Contents Refreshed

General

Prices unused in 30 days 30 Ignore Prices newer than 20/05/2021

Customer Price Lines Manage

Send selected to Worksheet View Price Group

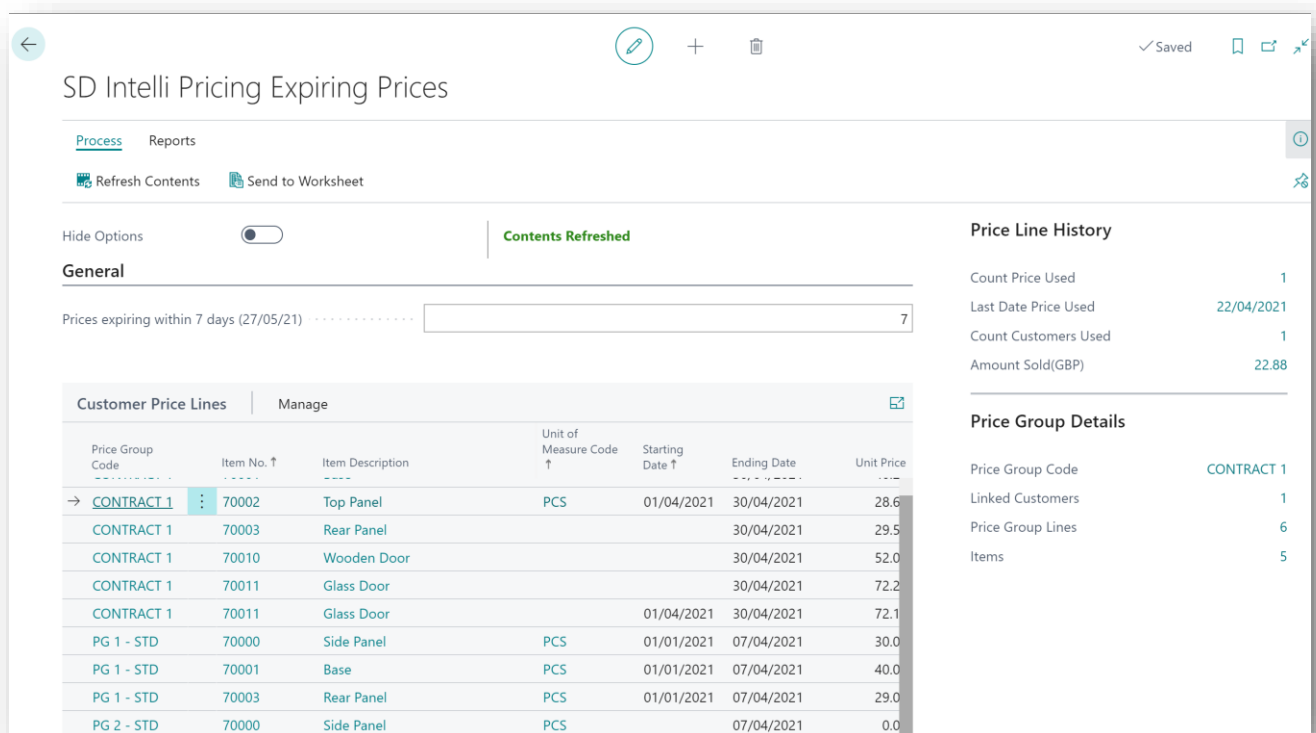
Price Group Code	Item No. ↑	Item Description	Unit of Measure Code ↑	Starting Date ↑	Ending Date	Unit Price	VAT Prod. Posting Group	Currency Code	Qty. per Unit of Measure	M Qu
PG 1 - STD	70001	Base	PCS	01/01/2021	07/04/2021	40.00	VAT25	—	1.00	
PG 1 - STD	70001	Base	PCS	08/04/2021	31/12/2021	40.01	VAT25	—	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 10-1

11 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 11-1*).



SD Intelli Pricing Expiring Prices

Process Reports

Refresh Contents Send to Worksheet

Hide Options ☐ Contents Refreshed

General

Prices expiring within 7 days (27/05/21) 7

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

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 11-1

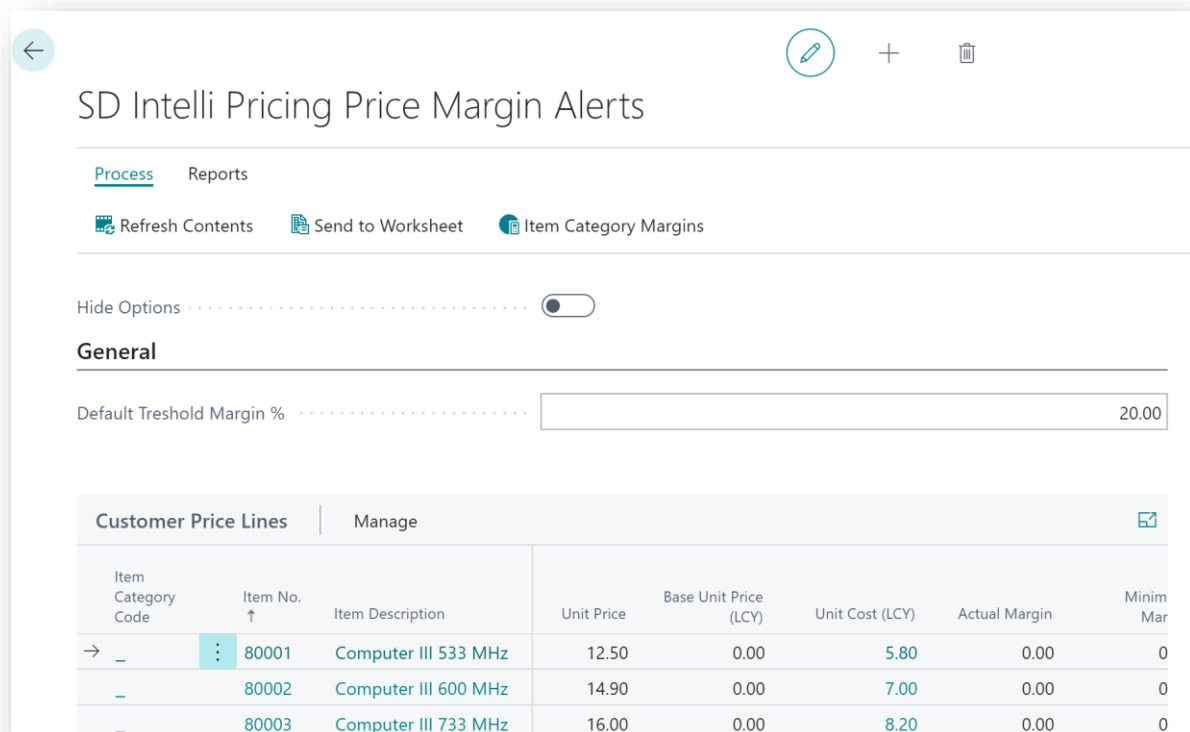
12 Margin Alerts

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 12-1*).



SD Intelli Pricing Price Margin Alerts

Process Reports

Refresh Contents Send to Worksheet Item Category Margins

Hide Options ☒

General

Default Threshold 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 12-1



Dynamics Shop

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+353 1 687 6600

info@simplyd.ie