

System Solutions LLC Pricing Tools for D365 Business Central User Guide

Extension

- Extension Version Number: 2.2.0.0
- Extension Version Date: 01/05/2026
- Published by: [System Solutions LLC](#)
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System Requirements

- Microsoft Dynamics 365 Business Central Essential or Premium Version 25.0 or newer

Description

- The Pricing Tools app adds multiple pricing features for items and price lists in Business Central. New fields can be found on the Item Card and Sales Price List pages, and a new page, Item Pricing and Profit Worksheet, can be used to maintain prices easier and faster.
 - Note: Price Lists must be Status = Active in order for Pricing Tools to be able to "see" the Price List to manipulate it.

Item price calculation by Unit Cost, Last Direct Cost or Vendor Cost

- Natively in Business Central the Price=Cost + Profit option in the Price/Profit Calculation field of the item card calculates price from Unit Cost.
- This app adds a new field called Price Calculation Cost Source to the Item Card, which allows you to calculate the price from Last Direct Cost or Vendor Cost instead.
 - **Unit Cost** is the default option that uses the regular calculation based on the item's Unit Cost.
 - **Last Direct Cost** comes from the last received purchase order Direct Unit Cost for the Item.
 - **Vendor Item Cost** uses the cost from the Price List cost of the item's primary vendor selected in Item Card > Replenishment > Vendor No. (there must be a Price List that includes this Vendor's Cost)

Price/Profit Calculation Price=Cost+Profit

Price Calculation Cost Source Unit Cost

Profit % 5

Unit Cost
Last Direct Cost
Vendor Cost

- Note: For Vendor Cost, if more than one applicable Purchase Price List line exists for an Item, the one with the lowest cost will be used. If starting or ending dates are used, they will be compared to the current Work Date to determine if the line is applicable. In Business Central a Price List with <blank> Start Date and End Date is valid forever.

Rounding calculated price to 09

- With the Round Calculated Price to 09 field enabled, the price will be rounded to the nearest 0.09 after it's calculated based on profit. For example, a calculated price of 4.81 will result in a price of 4.89 instead.

Unit Price 4.89

Unit Price Excl. Tax 4.89

Price/Profit Calculation Price=Cost+Profit

Price Calculation Cost Source ... Unit Cost

Round Price From Profit to 09 ...

Profit % 40.00

Location-based sales price list lines

- A Location Code column is added to the price list lines, which allows you to set prices for a specific location. Sales lines will use prices with either a matching location code or any with a blank location code.

Price List Code ↑	Price List Description	Status	Assign-to Type	Assign-to	Location Code	Variant C
S00001	Default price list.	Active	All Custom...		EAST	
S00001	Default price list.	Active	All Custom...		MAIN	
→ S00001	⋮ Default price list.	Active	All Custom...		WEST	

Automatic price calculation with sales price list lines

- Lines on the sales price list can be configured to automatically calculate a value based on other fields. The following added columns deal with automatically calculating price on the Sales Price List page: Automatic Price Calculation, Price Calculation Cost Source, Profit/Markup %, Multiplier, Round Calculated Price to 09.
- Automatic Price Calculation can be set to the following options:
 - **Fixed:** The default option that means the price is not automatically calculated, but simply inputted into the Price field as usual.
 - **Profit Margin:** The price should be automatically calculated based on the specified profit in the Profit/Markup % field. Specifying an alternate unit of measure on the line will also affect the calculation.
 - **Markup:** The price should be automatically calculated based on the specified markup in the Profit/Markup % field. Specifying an alternate unit of measure on the line will also affect the calculation.
 - **Price Multiplier:** The price should be automatically calculated based on the item's Unit Price field, multiplied by the Multiplier field. Specifying an alternate unit of measure on the line will also affect the calculation.
- When the calculation is set to Profit Margin or Markup, the cost used by the calculation is determined by the Price Calculation Cost Source field, which allows you to select Unit Cost, Last Direct Cost, Vendor Cost Margin, or Last Location Purchase Cost. Vendor cost comes from the purchase price of the item's primary vendor selected on the item card (on the price list). See the section below for Last Location Purchase Cost.

- Profit/Markup % is the profit used to calculate the price of the price list line if Profit Margin or Markup is selected in the Automatic Price Calculation field. When the cost is changed, the price on the price list line will automatically recalculate.
- Multiplier is the number multiplied with the item's unit price if Price Multiplier is selected in the Automatic Price Calculation field. When the item's unit price is changed, the price on the price list line will automatically recalculate.
- Round Calculated Price to 09 will round the price after calculating it. For example, 5.84 will become 5.89.

Price list line price calculation by Last Location Purchase Cost

- The price list lines have a fourth cost calculation source that is not available directly on the item card: Last Location Purchase Cost. This combines two features from the app: price list location and cost source. It's similar to the Last Direct Cost option but will only consider purchases made to the selected location.

Sales Prices page item information

- To help see how the price is calculated from profit or markup, the following five fields are added to the top of the Price List Lines page that is accessed through the Sales Price action on the Item Card.
 - Item Unit Cost = Item Card > Costs and Posting > Unit Cost
 - Item Last Direct Cost = Item Card > Costs and Posting > Last Direct Cost
 - Primary Vendor = Item Card > Replenishment > Vendor No.
 - Vendor Item No. = Item Card > Replenishment > Vendor Item No. (add with Personalize)
 - Vendor Item Cost = Purchase Price List > Direct Unit Cost for the Vendor No. that is selected as on Item Card > Replenishment > Vendor No. (the primary Vendor)
 - If Vendor No. is <blank> on the Item Card, Vendor Item Cost = 0.00

Sales Prices and Sales Discounts pages Quick Add action

- When viewing Sales Prices and Sales Discounts directly from the Item Card page without the app installed, only lines that already exist on prices lists can be modified. Pricing Tools adds a "Quick Add" action, which allows you to add item lines to price lists without opening the full Price List page.
 - The Price List Details group contains optional fields that filter the price list you'd like to add the price to. If only one price list exists, it will be automatically added to the Price List Code field.
 - The Price List Line Details group allows you to specify the Price List Code based on the filters from the group above. The Unit of Measure and Automatic Price Calculation fields allow you to specify fields that set up the price to add. The values of the price, profit/markup, or multiplier fields, as well as all other price list fields, can be modified directly on the line once it's added to the list.

Importing price list lines

- A new page is added called Price List Lines Full, which can be used to help import data to the price lists using web services.

Item Pricing and Profit Worksheet

- Item Pricing and Profit Worksheet allows you to easily update prices or discounts of items and their price list lines by putting them together in one worksheet. It also allows you to add lines to the worksheet by using filters such as category, vendor, and location.
 - Select > Generate

Generate Item Pricing and Profit Worksheet ↗ ✕

Use default values from Last used options and filters ▼

Settings

Default Price List TEST1 ▼

Worksheet Amount Type Price & Discount

Include Item Prices

Include Price List Line Prices

Include New Price List Lines Per ...

Filter: Item

× No. 1008|1003 ▼

× Item Category Code ▼

× Vendor No. ▼

- Item Prices = On, the Item(s) Item card prices will be added as lines on the worksheet.
- Include Price List Line Prices = On, the Item(s) price list lines will be added to the worksheet.
- Include New Price List Lines Per Item = On, a blank price list line will be added for every item that doesn't have an existing price list line for the selected filters.
- Below the settings, any filters for items and price list lines can be added.
- The selected default price list will have any new rows added to it. It also determines if the worksheet will be used to update prices or discounts according to its defined amount type: Price, Discount, or both (Price & Discount). For example, if you intend to create 10% line discounts for an entire category, you must select a default price list that has an amount type of either Discount or Price & Discount. The "Price" amount type will hide the line discount field.

Item Pricing and Profit Worksheet

Name: DEFAULT Amount Type: Price & Discount
 Default Price List Code: TEST1

Manage Process Actions Automate Fewer options

Pricing Worksheet Line Type	Item No.	Description	Price	Profit %	Price From Profit	Price Calc. Cost Source	Line Discount %	Item Category Code	Vendor No.	Vendor Item No.	Unit Cost	Unit of Measure C
Item		--	0.00	0.00	<input type="checkbox"/>	Unit Cost	0.00	--	--	--	0.00	
Item	1000	Pick Head 6# Railroad	30.00	26.95	<input type="checkbox"/>	Unit Cost	0.00	TOOLS	40000	--	16.59	PCS
Price List Li...	1000	Pick Head 6# Railroad	0.00	0.00	<input type="checkbox"/>	Unit Cost	14.00	TOOLS	40000	--	16.59	PCS
Price List Li...	1000	Pick Head 6# Railroad	25.71	30.00	<input checked="" type="checkbox"/>	Last Locati...	0.00	TOOLS	40000	--	16.59	PCS
--> Item			0.00	0.00	<input type="checkbox"/>	Unit Cost	0.00				0.00	

- After lines are added, changes can be made to Price, Line Discount %, the profit/markup fields added by the app, and other price list line fields. Use Actions > Edit Selected Lines to modify all selected lines at once. Click Post to apply the changes to the items and price list lines.

Recalculate price from vendor cost with a Job Queue Entry

- If items or sale price list lines are set up to calculate prices from profit or markup using vendor cost, a job queue entry can be set up to recalculate the prices on a regular basis. This is especially useful when adding vendor costs in the Purchase Price List that use starting or ending dates. When using dates, it's suggested to set up the Job Queue Entry to run at least once a day.
- To add, open Job Queue Entries in Business Central. Click New.
 - Object Type to Run: Codeunit.
 - Object ID to Run: 70372253.
 - Recurrence: Can be set for any time or schedule. For example, if you'd like to run it once a day, you can check every day of the week with number of minutes between runs set to 1440 (1 day). If you'd like it to run after business hours, use the starting time field to specify when it can start running.
 - Click the "Run once (foreground)" action if you'd like to test it.
 - Click the "Set Status to Ready" action to start the scheduled job.