



Pricing Oversight User Manual

Overview

Pricing Oversight is a Business Central add-on developed by binary lab to help organizations protect margins, prevent revenue leakage, and enforce pricing governance across sales documents. The app enables businesses to define pricing policies with clear thresholds for margin, price, and discount, and to automatically validate sales documents against these rules in real time.

Pricing Oversight supports both *warning-only* and *blocking* enforcement models, allowing companies to balance flexibility and control depending on their commercial strategy.

Application Overview

The Pricing Oversight app consists of the following main areas:

- **Pricing Oversight Setup** – Company-wide configuration and enforcement behaviour
- **Pricing Oversight Policies** – Policy headers that define validity, scope, and activation
- **Pricing Oversight Policy Lines** – Detailed pricing rules applied to customers, items, and groups
- **Pricing Verification Processing** – Automated and manual rule validation on sales documents

Pricing Oversight Setup

The **Pricing Oversight Setup** page defines how the app behaves for the company.

Fields and Configuration

Enabled - Indicates whether Pricing Oversight functionality is active for the company. When disabled, no pricing validations will occur.

Enforcement Mode - Determines how violations are handled:

- **Warning** – Users receive warnings when pricing exceeds thresholds but can continue processing.



- **Block** – Sales documents cannot be released or posted if pricing rules are violated.

No. Series - Specifies the number series used to automatically generate unique policy codes. This field is mandatory to ensure unique identification of each policy.

Cost Basis - Defines which cost value is used when calculating margins:

- Unit Cost (default)
- Standard Cost
- Last Direct Cost

Note: The selected cost basis directly impacts margin calculations for Margin rules.

Enabled Documents - Specifies which sales documents Pricing Oversight applies to:

- Sales Quotes
- Sales Orders
- Sales Invoices

Note: Each document type can be enabled or disabled independently based on business requirements.

Pricing Oversight Policy

Pricing Oversight Policies define *when* and *under what conditions* pricing rules apply.

Pricing Oversight Policy Card

Code - A unique identifier for the policy. This can be entered manually or automatically assigned using the configured No. Series.

Description - A free-text description explaining the purpose and intent of the policy.

Start Date - A mandatory date indicating when the policy becomes active. This date may be in the past or future.

End Date - An optional date after which the policy will no longer be active. If left blank, the policy remains active indefinitely. The End Date cannot be earlier than the Start Date.



Enabled - Marks the policy as active. Once enabled:

- The policy becomes effective based on its dates
- The policy cannot be modified

Note: To make changes, the policy must first be disabled, updated, and then enabled again. When enabling a policy, the system validates that all mandatory criteria are met. If validation fails, a list of errors is presented and must be resolved before activation.

Pricing Oversight Policy Lines

Policy Lines define the actual pricing rules enforced by a policy. Each policy can contain multiple lines.

Applies To - Specifies the entity the rule applies to:

- Customer
- Customer Price Group
- Item
- Item Category

Note: Based on the selection, the corresponding **No.** field becomes available for selection.

No.

The specific customer, customer price group, item, or item category the rule applies to. This field is mandatory and validated when the policy is enabled.

Rule Type - Determines which pricing aspect is enforced. Based on the selected rule type, the relevant threshold field becomes available.

Margin - Prevents margin leakage by calculating the margin percentage using the selected Cost Basis and line amount. The rule is exceeded when the margin falls **below** the configured minimum.

Price - Prevents users from setting a unit price **lower** than the configured minimum unit price.

Discount - Prevents users from applying a line discount percentage **higher** than the configured maximum.



Comparison Operator - The comparison operator is automatically set based on the Rule Type:

- For **Maximum Discount %**, the operator is *greater than or equal to*
- For all other rules, the operator is *less than or equal to*

Note: This indicates the direction in which a value is considered to exceed the threshold.

Currency Code - Specifies the currency the rule applies to.

- If populated, the rule only applies when the sales document currency matches.
- If left blank, the rule applies to the company's local currency.

Note: Rules are ignored if the currency does not match the sales document.

Minimum Unit Price - The lowest allowed unit price before the rule is exceeded.

Maximum Discount % - The highest allowed line discount percentage before the rule is exceeded.

Minimum Margin % - The lowest allowed margin percentage before the rule is exceeded.

Note: Only the threshold field relevant to the selected Rule Type is enabled for entry.

Processing of Pricing Rules

Pricing Oversight evaluates policies and lines using a structured and predictable sequence.

Policy Eligibility

A policy is considered for processing when:

- The policy is Enabled
- The Sales Document Date falls between the policy Start Date and End Date

Note: The Sales Document Date is also used by standard Business Central pricing and discount logic.



Policy Processing Order

If multiple valid policies exist, the **oldest policy** (by Code sequence) is processed first.

Line Matching and Priority

For each sales line, Pricing Oversight evaluates policy lines in the following order:

1. Customer
2. Customer Price Group
3. Item
4. Item Category

Once a match is found, no further lines are considered:

- If a Customer line matches, Customer Price Group, Item, and Item Category are ignored
- If a Customer Price Group line matches, Item and Item Category are ignored
- If an Item line matches, Item Category is ignored

This ensures that the most specific rule always takes precedence.

Rules can therefore be layered from general (Item Category) to highly specific (Customer + Item).

Triggering Pricing Verification

Pricing Oversight automatically verifies pricing under the following conditions:

Automatic Triggers

- Changing the **Document Date** re-verifies all sales lines to account for newly effective or expired policies
- Updating **Unit Price**, **Line Discount %**, or **Line Amount** on Item-type sales lines triggers immediate re-validation



Manual Verification

A **Verify Pricing** action is available from the Pricing Oversight FactBox on:

- Sales Quotes
- Sales Orders
- Sales Invoices

Note: This allows users to manually validate all sales lines and obtain the most up-to-date status before releasing or posting a document.

Enforcement Outcome

When pricing exceeds configured thresholds:

- In **Warning** mode, users are informed but can proceed
- In **Block** mode, documents cannot be released or posted until violations are resolved

This ensures consistent pricing governance aligned with company policy.

Summary

Pricing Oversight provides a structured, transparent, and enforceable approach to pricing control in Business Central. By combining flexible policy definitions with real-time validation, businesses can safeguard margins, reduce risk, and maintain pricing discipline across all sales documents.

Version Information

Detail	Information
Add-on Name	Pricing Oversight
Publisher	Binary Lab (Pty) Ltd
Supported Product	Microsoft Dynamics 365 Business Central
Release Date	January 2026