



BEYOND CARTS

User Guide



BEYONDIT GmbH

Schauenburgerstr. 116
24118 Kiel
Germany
+ 49 431 3630 3700
hello@beyondit.gmbh

Table of Contents

About BEYOND Carts

Setup

- Assign User Permissions

- Setup Beyond Carts

Features

- Create Cart

- Add Items to Cart

- Create Purchase Order from Carts

About BEYOND Carts

About this Extension

BEYOND Carts is an extension for Microsoft Dynamics 365 Business Central.

It was developed by:

BEYONDIT GmbH

Schauenburgerstraße 116

24118 Kiel

Germany

moin@beyondit.gmbh

+49 431 3630 3700

BEYOND Carts adds carts to your Business Central.

Users can create a cart within their Microsoft 365 Business Central account. This cart serves as a temporary repository for selected items. The carts are intended for ordering goods, consumables and the like within the company for employees who have access to a BC application at their workplace but cannot or should not initiate external purchase processes. Item stock can be replenished without a specific order. Within the system, users can search for items to add to their cart. Users can search for items to add to their cart. Users have the ability to adjust quantities and remove items from the cart as needed to ensure accurate purchase order planning.

Multiple carts can be managed simultaneously, allowing users to separate items for different users or vendors. Integration with purchase orders: When you're ready, you can seamlessly convert cart contents into purchase orders to replenish item stock. This step ensures that the correct items and quantities are ordered for the warehouse. During the import function, all carts that could be relevant for a purchase order (for stock) are displayed. It is possible to filter by supplier in advance. It is also possible to mark items as "Recurring" so that they are not removed from the cart after an import. These items can be used multiple times in further orders.

The latest version of this documentation can be found at the following link: [BEYOND Carts Documentation](#).

NOTE

Dependencies on or to other apps

No dependent applications are required to use BEYOND Carts, i.e. you do not need to install any additional applications.

Version	Date	Author	Comment
1.0	20.11.2023	Jannic Weidel	Initial Version of the Documentation

Access public

[Continue with the next chapter](#)

Assign User Permissions

The following description shows how to assign user permissions for the **BEYOND Carts** extension. The permission sets provided are:

Permission Set	Description
BYD CR Reader	This permission set enables the reading of data from the BeyondCarts extension.
BYD CR User	This permission set enables the use of the BeyondCarts extension at user level. In this permission set, the setup is excluded, i.e. the user has access to the functions, but not to the setup of the app.
BYD CR Admin	This permission set gives the assigned user administrative access to the BeyondCarts extension and the associated setup.

To assign the permission set for **BEYOND Carts** to a user, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Permission Sets** and click on the appropriate search result.
3. The **Permission Sets** page is displayed.
4. Select one of the above permission sets from the list.
5. Click **Related > Permissions > Permission Set by User** in the menu bar.

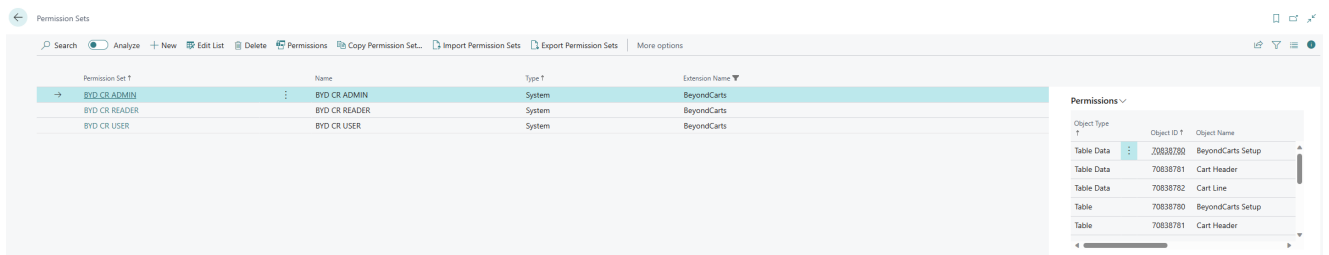


Figure: Permission Sets for BEYOND Carts

6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondCarts** as filter criteria.
8. The list is filtered to the permission sets of **BeyondCarts**.
9. Select the check box on the right side of the page for the user or users to whom you want to assign the permission set.

You have assigned a permission set for **BEYOND Carts** to a user. Note that users with the **SUPER** permission set have all rights, i.e. you do not need to give this user any additional rights.

Setup Beyond Carts

This chapter describes how to set up Beyond Carts.

Please note that you are assigned the appropriate permission set for setting up Beyond Carts. For more information on how to assign the permission set, please refer to the chapter [Assign User Permissions](#).

To set up Beyond Carts, proceed as follows:

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

← (back) ✎ (edit) ↗ (share) + (add) 🗑️ (delete) ✓ Saved 📌 (bookmark) 📄 (print) ↗ (refresh)

BeyondCarts Setup

General

Default Cart No. [dropdown] Default Cart Behavior ... [Add Directly] [dropdown]

Multiple Carts Per User ... Get Carts by Vendor ...

No. Series

Cart Nos. [dropdown]

Figure: Beyond Carts Setup

4. Open the dropdown list for the **Default Cart No.** field and click **New**. This cart is always used if no separate cart has been created for a user. We recommend that you do not activate the **Recurring** field for this cart.
5. The **Select - Cart** window is displayed.

General

No. Cart Behavior ▾

Description Recurring

User Id

Lines | New Line Delete Line Create Item

Type	Item No.	Description	Vendor No.	Vendor Name	Vendor It
→ Item					

Protocol >

Figure: Select – Cart

6. Complete the information for the cart and return to the **Beyond Carts Setup** page.
7. If you want to allow multiple carts per user, activate the **Multiple Carts Per User** slider.
8. In the dropdown menu for the **Default Cart Behavior** field, choose between the **Add Directly** or **User Input** options. With the **Add Directly** option, the item lines are added to the cart directly from the document with the corresponding quantity. With the **User Input** option, you are prompted to enter the item quantity when transferring the item lines to the cart.
9. Activate the **Get Carts by Vendor** slider if you want to filter by vendor first when retrieving cart lines. When you create an order and retrieve cart lines, not all cart lines in the system are displayed, but only the cart lines that are stored in the system for the selected vendor.
10. Under the **No. Series** section, you must set up a new number series for the carts in the **Cart Nos.** field.
11. Open the dropdown menu and select the **New** option from the window.
12. Create a new number series and assign it using the field.

You have set up BEYOND Carts.

For more information on how to use BEYOND Carts, please refer to the chapter [Create Cart](#).

Create Cart

This chapter describes how to create a cart and add items or other goods to the cart. For more information on how to create an order from one or more carts, please refer to the chapter [Create Order From Carts](#).

To create a cart, proceed as follows:

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

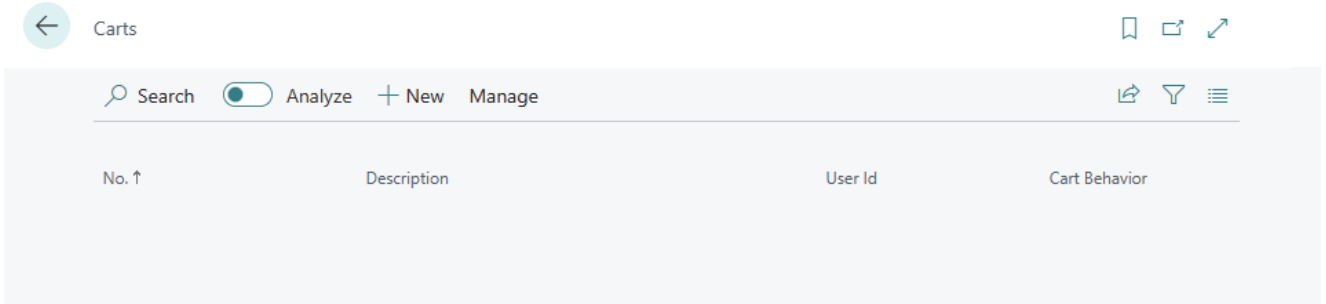


Figure: Create Cart

4. To create a new cart, click on the **New** option in the menu bar.
5. A new cart card is displayed.

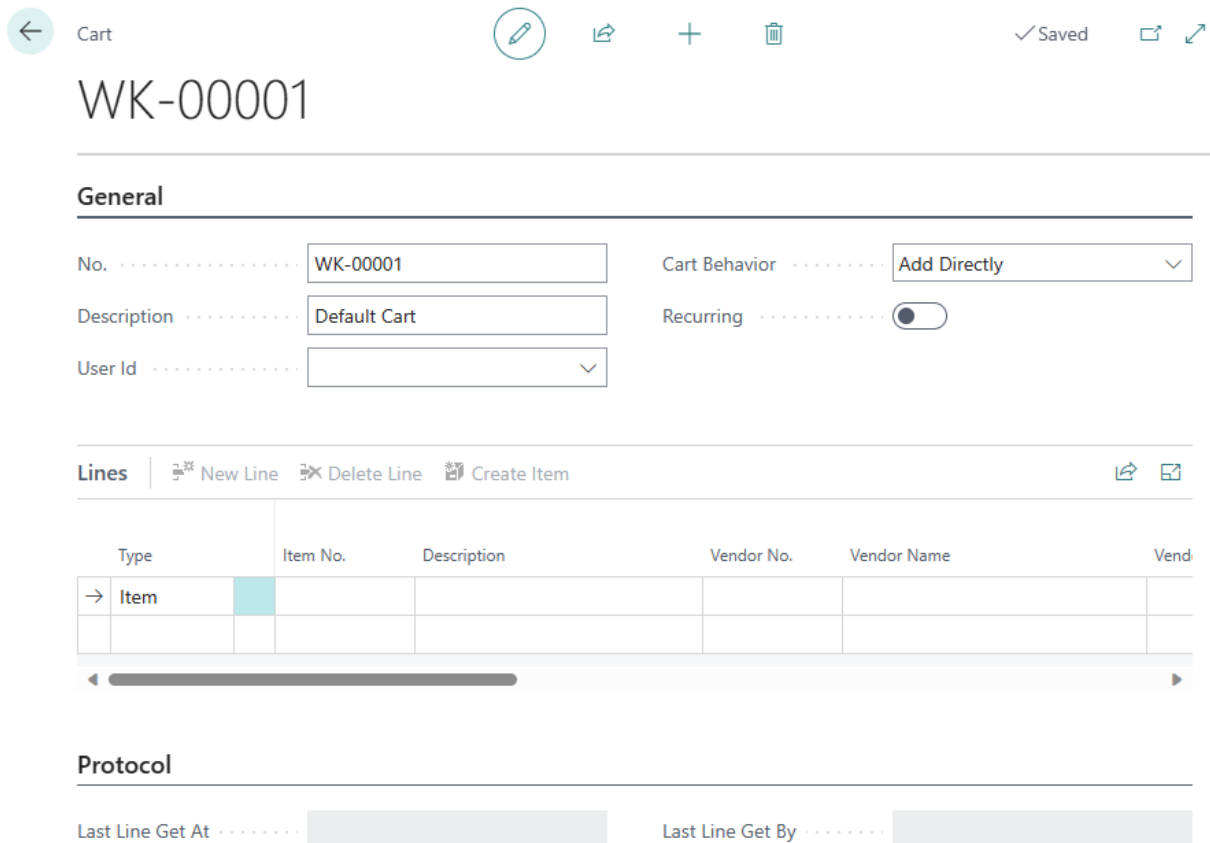


Figure: New Cart Card

6. Click in the **Description** field and enter a description for the cart. Please note that the information in the **No.** field is automatically assigned by the system if you have stored the number series for carts on the **BeyondCarts Setup** page. For more information on the setup, please refer to the chapter [Setup Beyond Carts](#).
7. Open the drop-down list for the **User ID** field and select the user to whom this cart should be assigned.
8. Use the value in the **Default Cart Behavior** field to determine how the items are added to the cart. The following values

are possible:

- With the **Add Directly** option, the item lines are added to the cart directly from the document with the corresponding quantity.
 - With the **User Input** option, you will be prompted to enter the item quantity and other information when transferring the item lines to the cart.
9. You can use the **Recurring** slider to define whether the cart is displayed on a recurring basis, i.e. the lines from the cart are not deleted if the lines have been transferred to a purchase order and are displayed again when a new purchase order is triggered. You can also make this setting for individual item lines by activating the **Recurring** checkbox for existing item lines.
 10. The item lines contained in the cart are displayed under the **Lines** tab. As the cart has been newly created, no lines are displayed in this area.
 11. The **Protocol** tab displays information about the user and the time stamp from which this data record was retrieved for a purchase order.

You have created a cart. In the [Add Items To Cart](#) chapter, you will find further information on how to fill the cart with item lines.

Add Items to Cart

This chapter describes how to add one or more items to the default cart or your personal cart. If you do not have a personal cart, the item lines you have selected will be transferred to the default cart.

You can use this function in service and sales documents. You can also add items to your cart via the item card. The following description uses a sales order to illustrate how it works.

To add an item to the shopping cart, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Sales Orders** and click on the corresponding search result.
3. The **Sales Orders** page is displayed.
4. Open the card of an existing sales order or create a new sales order.
5. To add an item to the cart, click on the corresponding item line in the **Lines** tab and select the **Add to Cart** option from the menu.

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT
→ Item	S-100		S-100 Semi-Automatic	HAUPT	1		-	STÜCK	2.400,00

Figure: Add item line to cart

6. If you have set the value **Add Directly** in the **Default Cart Behavior** field when setting up the cart, you will receive a message that the item has been added to a cart. If you have set the value **User input** in the **Default Cart Behavior** field when setting up the cart, you must now define the quantity of the item as well as other information.

Add to Cart ↗ ✕

Item No.	<input type="text" value="S-100"/>	Quantity	<input type="text" value="1,00"/>
Description	<input type="text" value="S-100 Semi-Automatic"/>	Location Code	<input style="border-bottom: 1px solid #ccc;" type="text" value="HAUPT"/>
Vendor No.	<input style="border-bottom: 1px solid #ccc;" type="text"/>	Bin Code	<input style="border-bottom: 1px solid #ccc;" type="text"/>
Vendor Item No.	<input style="background-color: #f0f0f0; border-bottom: 1px solid #ccc;" type="text"/>	Recurring	<input checked="" type="checkbox"/>

Figure: Enter item quantity and other information

7. Under the **Vendor No.** field, enter the vendor via which this item can be obtained.
8. Enter the required item quantity to be purchased in the **Quantity** field.
9. Activate the **Recurring** slider if the item line should not be deleted from the cart when the item line is transferred to a purchase order. With this setting, you define that the item line you have defined is displayed with every new purchase order.
10. Click **OK** to add the item line to a cart.

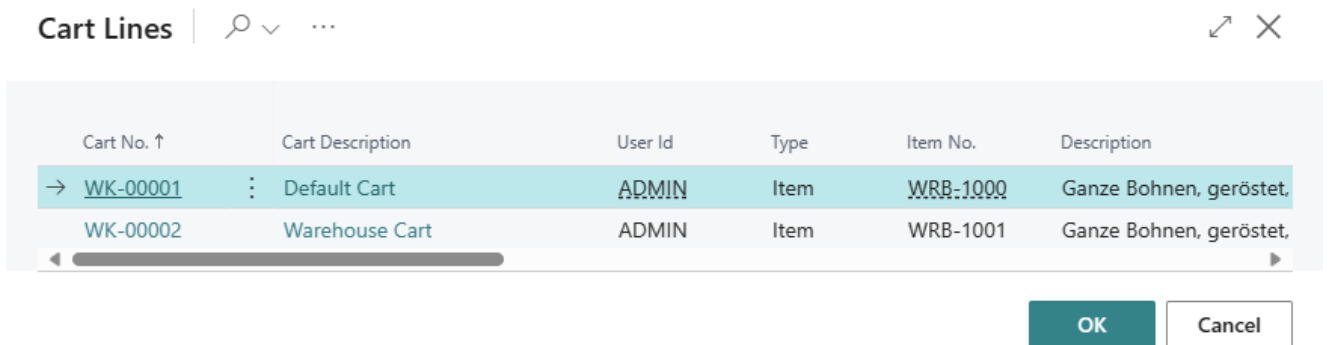
You have added an item to a cart. For more information on how to create an order from one or more carts, please refer to the chapter [Create Purchase Order From Carts](#).

Create Purchase Order From Carts

This chapter describes how to create a purchase order consisting of one or more carts with the corresponding item lines.

To create a purchase order based on one or more carts, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Purchase Order** and click on the corresponding search result.
3. The **Purchase Order** page is displayed.
4. Click on the **New** option in the menu to create a new purchase order.
5. A new Purchase Order card is displayed.
6. Enter the name of the vendor for whom you want to create a purchase order in the **Vendor Name** field.
7. Click on the option **Get Cart Lines** in the menu bar.
8. The **Cart Lines** window is displayed.



Cart No. ↑	Cart Description	User Id	Type	Item No.	Description
→ WK-00001	Default Cart	ADMIN	Item	WRB-1000	Ganze Bohnen, geröstet,
WK-00002	Warehouse Cart	ADMIN	Item	WRB-1001	Ganze Bohnen, geröstet,

Figure: Cart Lines

9. Select the item line and click **OK** to transfer the cart line to the purchase order.
10. An item line is created in the purchase order. At the same time, the corresponding item line is deleted from the cart. If the item line is still displayed in the cart, it is a “recurring” item line, i.e. this item is ordered repeatedly.
11. Repeat the process until all cart lines for the selected vendor have been transferred to the purchase order and then complete the purchase order.

You have created a purchase order based on one or more carts.