



# BEYOND

## COLLECTIVESHIPMENTS

# User Guide



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# About BEYOND CollectiveShipments

## About this Extension

BEYOND CollectiveShipments is an extension for Microsoft Dynamics 365 Business Central.  
It was developed by:

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Beyond CollectiveShipments is an extension of our template-based report designer (Beyond Reports) with live preview and HTML text capabilities that allows you to create and print collective shipments. You can use the created documents to organize your shipments from sales and service, group them and prepare them for your shipping agents.

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

 NOTE

**Dependencies from or to other apps**

Additional, basic applications are required to use BEYOND CollectiveShipments. The following applications are required to use BEYOND CollectiveShipments:

- BEYOND Reports:** A solution with a template-based designer that can be used to create company-specific report templates.

| Version     | Date       | Author        | Comments                            |
|-------------|------------|---------------|-------------------------------------|
| 1.0         | 09.01.2023 | Jannic Weidel | Intial Version of the Documentation |
| File Access |            | public        |                                     |

[Continue with the next chapter](#)

# Setup Beyond CollectiveShipments

This chapter describes how to set up Beyond CollectiveShipments.  
Note that you are assigned the appropriate permission set to set up Beyond CollectiveShipments. For more information on how the permission set is assigned, please refer to the chapter [Assign Permission Set](#).

To set up Beyond CollectiveShipments, proceed as follows:

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

←

✓ Saved

Collective Shipment Setup

General

Show Details By Default

No. Series

Collective Shipment Nos.

- 4. Activate the **Show Details By Default** slider if you want to display additional details such as the type of shipment line, the quantity and the sales price. You can also show or hide this information later using a button.
- 5. Click in the **Collective Shipment Nos.** field and open the drop-down menu.
- 6. Click on **New** in the drop-down menu for the **Collection Shipment Nos.** field to create a new number series.
- 7. Define a number series for collective shipments. For more information on number series, see the chapter [Create Number Series](#).

You have set up Beyond CollectiveShipments.

[Continue with the next chapter](#)

# Setup Collective Shipment Report

This chapter describes how to set up the report for Collective Shipments. As **Beyond CollectiveShipments** is based on **Beyond Reports**, the setup is carried out via the **Beyond Reports Setup** page. Please note that you must have the appropriate permissions to be able to make changes on the **Beyond Reports Setup** page. Further information on the permission sets of **Beyond Reports** can be found in the chapter [Set Up Users](#).

Proceed as follows to import the report for Collective Shipments:

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

←

Beyond Report Setup

✓ Saved

🔖

📄

🔗

🔍 Search

🔍 Analyze

📄 Edit List

✎ Edit

👁 View

🏠 Run Report

📄 Report Placeholders

⋮

🔗

🔍

☰

Report Area ↑

Caption

Copy Report Setup to...

Reports Setup Wizard

Setup Report Selections

More options

Active as Default

|   |                          |   |                            |                                     |
|---|--------------------------|---|----------------------------|-------------------------------------|
| → | <a href="#">Purchase</a> | ⋮ | Purchase - Quote           | <input checked="" type="checkbox"/> |
|   | Purchase                 |   | Purchase - Order           | <input checked="" type="checkbox"/> |
|   | Purchase                 |   | Purchase - Blanket Order   | <input checked="" type="checkbox"/> |
|   | Purchase                 |   | Purchase - Return Order    | <input checked="" type="checkbox"/> |
|   | Purchase                 |   | Purchase - Receipt         | <input checked="" type="checkbox"/> |
|   | Purchase                 |   | Purchase - Invoice         | <input checked="" type="checkbox"/> |
|   | Purchase                 |   | Purchase - Credit Memo     | <input checked="" type="checkbox"/> |
|   | Purchase                 |   | Purchase - Return Shipment | <input checked="" type="checkbox"/> |
|   | Sales                    |   | Sales - Quote              | <input checked="" type="checkbox"/> |
|   | Sales                    |   | Sales - Order              | <input checked="" type="checkbox"/> |
|   | Sales                    |   | Sales - Shipment           | <input checked="" type="checkbox"/> |
|   | Sales                    |   | Sales - Invoice            | <input checked="" type="checkbox"/> |
|   | Sales                    |   | Sales - Credit Memo        | <input checked="" type="checkbox"/> |
|   | Sales                    |   | Sales - Blanket Order      | <input checked="" type="checkbox"/> |
|   | Sales                    |   | Sales - Return Order       | <input checked="" type="checkbox"/> |
|   | Sales                    |   | Sales - Return Receipt     | <input checked="" type="checkbox"/> |
|   | Sales                    |   | Sales - Pro Forma Invoice  | <input checked="" type="checkbox"/> |
|   | Service                  |   | Service - Quote            | <input checked="" type="checkbox"/> |
|   | Service                  |   | Service - Order            | <input checked="" type="checkbox"/> |
|   | Service                  |   | Service - Item Worksheet   | <input checked="" type="checkbox"/> |
|   | Service                  |   | Service - Shipment         | <input checked="" type="checkbox"/> |
|   | Service                  |   | Service - Invoice          | <input checked="" type="checkbox"/> |
|   | Service                  |   | Service - Credit Memo      | <input checked="" type="checkbox"/> |
|   | Service                  |   | Service - Warranty Claim   | <input checked="" type="checkbox"/> |
|   | Reminder                 |   | Issued Reminder            | <input checked="" type="checkbox"/> |
|   | Reminder                 |   | Reminder                   | <input checked="" type="checkbox"/> |
|   | Collective Shipment      |   | Collective Shipment        | <input type="checkbox"/>            |

- 4. Select one of the report templates already set up.
- 5. Select the option **Copy Report Setup to...** from the menu bar.
- 6. The **Beyond Reports Setup** window is displayed.
- 7. Select the **Collective Shipment** line in the window.

| Report Area ↑                         | Caption                    | Active as Default                   |
|---------------------------------------|----------------------------|-------------------------------------|
| Purchase                              | Purchase - Blanket Order   | <input type="checkbox"/>            |
| Purchase                              | Purchase - Return Order    | <input checked="" type="checkbox"/> |
| Purchase                              | Purchase - Receipt         | <input checked="" type="checkbox"/> |
| Purchase                              | Purchase - Invoice         | <input checked="" type="checkbox"/> |
| Purchase                              | Purchase - Credit Memo     | <input checked="" type="checkbox"/> |
| Purchase                              | Purchase - Return Shipment | <input checked="" type="checkbox"/> |
| Sales                                 | Sales - Quote              | <input checked="" type="checkbox"/> |
| Sales                                 | Sales - Order              | <input checked="" type="checkbox"/> |
| Sales                                 | Sales - Shipment           | <input checked="" type="checkbox"/> |
| Sales                                 | Sales - Invoice            | <input checked="" type="checkbox"/> |
| Sales                                 | Sales - Credit Memo        | <input checked="" type="checkbox"/> |
| Sales                                 | Sales - Blanket Order      | <input checked="" type="checkbox"/> |
| Sales                                 | Sales - Return Order       | <input checked="" type="checkbox"/> |
| Sales                                 | Sales - Return Receipt     | <input checked="" type="checkbox"/> |
| Sales                                 | Sales - Pro Forma Invoice  | <input checked="" type="checkbox"/> |
| Service                               | Service - Quote            | <input checked="" type="checkbox"/> |
| Service                               | Service - Order            | <input checked="" type="checkbox"/> |
| Service                               | Service - Item Worksheet   | <input checked="" type="checkbox"/> |
| Service                               | Service - Shipment         | <input checked="" type="checkbox"/> |
| Service                               | Service - Invoice          | <input checked="" type="checkbox"/> |
| Service                               | Service - Credit Memo      | <input checked="" type="checkbox"/> |
| Service                               | Service - Warranty Claim   | <input checked="" type="checkbox"/> |
| Reminder                              | Issued Reminder            | <input checked="" type="checkbox"/> |
| Reminder                              | Reminder                   | <input checked="" type="checkbox"/> |
| → <a href="#">Collective Shipment</a> | ⋮ Collective Shipment      | <input type="checkbox"/>            |

OK

Cancel

- To copy the setup (logos and fields to be printed) into the collective shipment report template, click **OK**.
- The setup is adopted from the selected template and the **Active as Default** checkbox is activated. The checkbox indicates that this report setup is actively used as a template for collective shipments.

If you want to make further or individual changes to the report template for collective shipments, you can open the corresponding report template card. To open the report template card for collective shipments, select the **Collective Shipment** line from the list and click **Edit** in the menu bar. Further information on configuring the report template can be found in the **Beyond Reports** documentation under the chapter [Configure Reports](#).

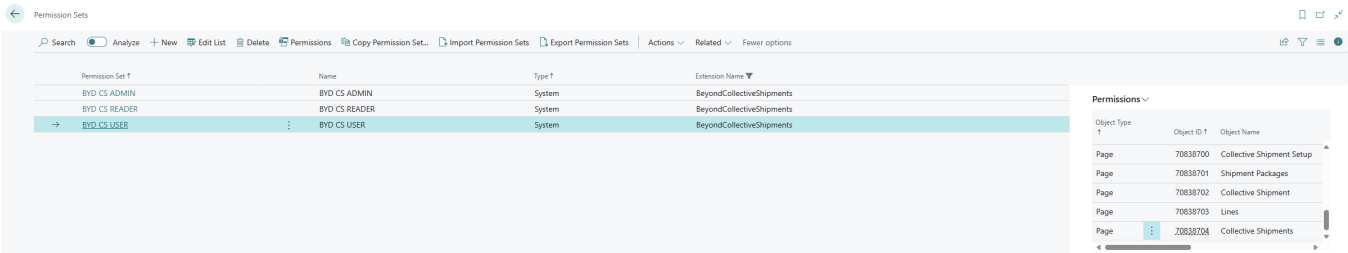
# Assign Permission Set

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

| Permission Set | Description   |
|----------------|---|
| BYD CS Reader  | This permission set enables the reading of data from the extension <b>BeyondCollectiveShipments</b> .   |
| BYD CS User    | This permission set enables the use of the <b>BeyondCollectiveShipments</b> 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 CS Admin   | This permission set gives the assigned user administrative access to the <b>BeyondCollectiveShipments</b> extension and the associated setup.   |

To assign the permission set for **BEYOND CollectiveShipments** 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.



6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondCollectiveShipments** as filter criteria.
8. The list is filtered to the permission sets of **BeyondCollectiveShipments**.
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 CollectiveShipments** 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.

# Create Shipping Agent

This section describes how to create a Shipping Agent that you can use for **Beyond CollectiveShipments**.  
To create a shipping agent, proceed as follows:

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

← Shipping Agents ✓ Saved □ ↻ ↺

Search Analyze + New Edit List Delete Shipping Agent More options

| Code T    | Name                                   | Address | Post Code | City | Country/Region Code | Contact | Phone No. | Email | Package Tracking URL                        | Shopify Tracking Company |
|-----------|--|---------|-----------|------|---------------------|---------|-----------|-------|---|--------------------------|
| → DHL     | DHL Systems, Inc.                      |         |           |      |                     |         |           |       | www.dhl.com/en/express/tracking.html?A...   |                          |
| EIGEN-LOG | Eigene Logistik                        |         |           |      |                     |         |           |       |   |                          |
| FEDEX     | Federal Express Corporation            |         |           |      |                     |         |           |       | www.fedex.com/apps/fedestrack/?action=L...  |                          |
| UPS       | United Parcel Service of America, Inc. |         |           |      |                     |         |           |       | wwwapps.ups.com/tracking/tracking.cgi?tr... |                          |

- 4. To create a new shipping agent, click on **New** in the menu bar.
- 5. Enter a code for the shipping agent in the new line under the **Code** column.
- 6. Enter the name of the shipping agent under the **Name** column.
- 7. Enter the address of the deliverer under the **Address** column.
- 8. Enter the zip code of the deliverer under the **Post Code** column.
- 9. Under the **City** column, enter the shipping agent's city.
- 10. Under the **Country/Region Code** column, enter the country or region of the shipping agent.
- 11. Under the **Contact** column, enter the name of the contact person at the shipping company.
- 12. Enter the telephone number for the shipping agent under the **Phone no.** column.
- 13. Enter the deliverer's email address in the **Email** column.
- 14. Enter the URL for package tracking under the **Package Tracking URL** column. To allow users to track specific parcels, add %1 to the URL. When users track a package, %1 is replaced by the tracking number.
- 15. Under the **Shopify Tracking Company** column, enter the company in Shopify where you can track your items. For more information about Shopify, see [Get Started with the Shopify Connector](#).

You have created a shipping agent.

[Continue with the next chapter](#)



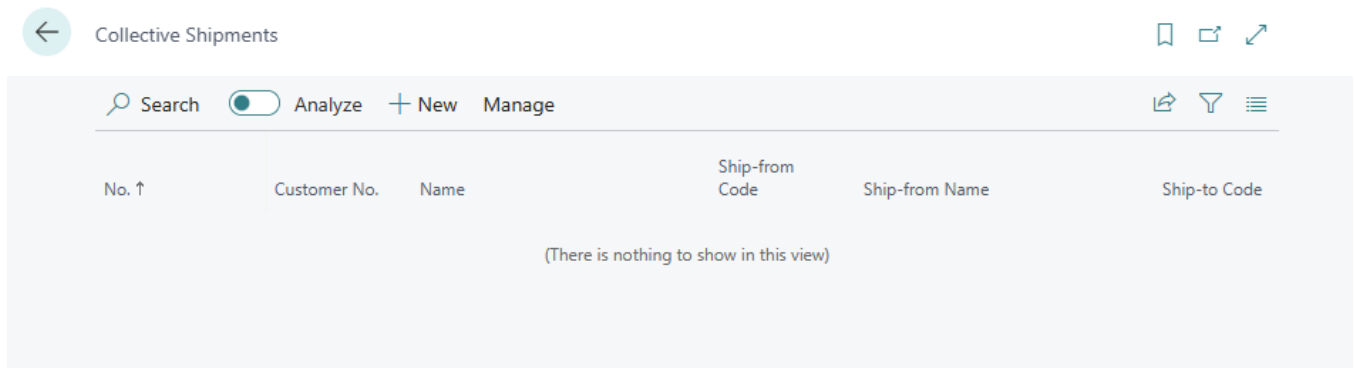
# Create Collective Shipment

This section describes how to create a collective shipment.


To create a collective shipment, sales shipments or service shipments must already be booked in your system.

Proceed as follows to create a collective shipment:

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



4. To create a collective shipment, click on **New** in the menu bar.
5. A new collective shipment card is displayed.
6. Click in the **Customer No.** field and select the customer for whom you want to create a collective shipment from the drop-down list. The **No.** field is automatically assigned by the system based on the number series set up. Further information on setting up **Beyond CollectiveShipments** can be found in the chapter [Setup Beyond CollectiveShipments](#).
7. Under the **Shipping Agent** tab in the **Shipping Agent Code** field, select a shipping agent who will transport the collective shipment to the customer. If the relevant shipping agent is not included in the drop-down list, you must create the carrier. You can find further information on this in the chapter [Create delivery agent](#).
8. Your company data is entered under the **Transport** tab in the **Ship-from** tab. You can adjust or complete these if necessary.
9. Click in the **Ship-To Code** field and select the location of the customer from the dropdown list. Other fields in this area are automatically filled in by the system. If necessary, you can adjust or complete them.
10. Under the **Shipment Details** tab, enter the collection date of the deliveries in the **Collection at Date** field.
11. Enter the earliest possible time for the collection day in the **Collection from Time** field.
12. Enter the last possible time for the collection day in the **Collection to Time** field.
13. Enter the delivery day in the **Delivery at Date** field.
14. Enter the earliest possible time for the delivery day in the **Delivery from Time** field.
15. Enter the last possible time for the delivery day in the **Delivery to Time** field.
16. In the **Goods** area, you can enter a text for the collective shipment in the **Goods Description** field.
17. Activate the **Dangerous Goods** slider if the collective shipment includes dangerous goods.
18. To fill the **Lines** area with shipments, click on the **Get Shipments** option in the menu bar.
19. Select whether you want to include deliveries from sales documents or service documents in the collective shipment.

 Please select the type of shipments to get:

☒ Sales

☐ Service

OK

Cancel

20. Click on **OK** to go to the posted Shipments.

## Posted Sales Shipments



| No.    | Sell-to Customer No. | Sell-to Customer Name | Currency Code | Location Code | No. Printed |
|--------|----------------------|-----------------------|---------------|---------------|-------------|
| 102215 | 10000                | Adatum Corporation    |               |               | 0           |
| 102191 | 10000                | Adatum Corporation    |               |               | 0           |
| 102186 | 10000                | Adatum Corporation    |               |               | 0           |
| 102178 | 10000                | Adatum Corporation    |               |               | 0           |
| 102174 | 10000                | Adatum Corporation    |               |               | 0           |
| 102204 | 10000                | Adatum Corporation    |               |               | 0           |
| 102203 | 10000                | Adatum Corporation    |               |               | 0           |
| 102202 | 10000                | Adatum Corporation    |               |               | 0           |
| 102165 | 10000                | Adatum Corporation    |               |               | 0           |
| 102201 | 10000                | Adatum Corporation    |               |               | 0           |
| 102200 | 10000                | Adatum Corporation    |               |               | 0           |
| 102199 | 10000                | Adatum Corporation    |               |               | 0           |
| 102160 | 10000                | Adatum Corporation    |               |               | 0           |
| 102157 | 10000                | Adatum Corporation    |               |               | 0           |
| 102148 | 10000                | Adatum Corporation    |               |               | 0           |
| 102146 | 10000                | Adatum Corporation    |               |               | 0           |
| 102136 | 10000                | Adatum Corporation    |               |               | 0           |
| 102125 | 10000                | Adatum Corporation    |               |               | 0           |
| 102120 | 10000                | Adatum Corporation    |               |               | 0           |
| 102110 | 10000                | Adatum Corporation    |               |               | 0           |
| 102099 | 10000                | Adatum Corporation    |               |               | 0           |
| 102094 | 10000                | Adatum Corporation    |               |               | 0           |
| 102085 | 10000                | Adatum Corporation    |               |               | 0           |
| 102080 | 10000                | Adatum Corporation    |               |               | 0           |
| 102070 | 10000                | Adatum Corporation    |               |               | 0           |

OK

Cancel

21. Select one or more lines from the posted shipments and click on **OK**.
22. The shipments are transferred to the **Lines** area in the collective shipment card. If you have set up the system so that no details are displayed by default, you can use the **Show Details** option in the menu bar of the **Lines** tab to display additional information on the individual shipments in the lines.

Lines New Line Delete Line HTML Editor Show Details Hide Details

| Shipment Type    | Shipment No. | Type | No.    | Description                 | Description 2 | Quantity | Unit of Measure Code | Unit Price |
|------------------|--------------|------|--------|-----------------------------|---------------|----------|----------------------|------------|
| → Sales Shipment | S-SHPT102094 |      |        | Shipment - S-SHPT102094     |               |          |                      |            |
| Sales Shipment   | S-SHPT102094 | Item | 1960-S | ROME Guest Chair, green     |               | 4,00     | PCS                  | 192,80     |
| Sales Shipment   | S-SHPT102085 |      |        | Shipment - S-SHPT102085     |               |          |                      |            |
| Sales Shipment   | S-SHPT102085 | Item | 1896-S | ATHENS Desk                 |               | 6,00     | PCS                  | 1.000,80   |
| Sales Shipment   | S-SHPT102085 | Item | 1972-S | MUNICH Swivel Chair, yellow |               | 2,00     | PCS                  | 190,10     |
| Sales Shipment   | S-SHPT102085 | Item | 1996-S | ATLANTA Whiteboard, base    |               | 4,00     | PCS                  | 1.397,30   |
| Sales Shipment   | S-SHPT102080 |      |        | Shipment - S-SHPT102080     |               |          |                      |            |
| Sales Shipment   | S-SHPT102080 | Item | 1960-S | ROME Guest Chair, green     |               | 4,00     | PCS                  | 192,80     |
| Sales Shipment   | S-SHPT102070 |      |        | Shipment - S-SHPT102070     |               |          |                      |            |
| Sales Shipment   | S-SHPT102070 | Item | 1896-S | ATHENS Desk                 |               | 8,00     | PCS                  | 1.000,80   |
| Sales Shipment   | S-SHPT102070 | Item | 1960-S | ROME Guest Chair, green     |               | 4,00     | PCS                  | 192,80     |
| Sales Shipment   | S-SHPT102070 | Item | 1972-S | MUNICH Swivel Chair, yellow |               | 3,00     | PCS                  | 190,10     |
| Sales Shipment   | S-SHPT102070 | Item | 1996-S | ATLANTA Whiteboard, base    |               | 5,00     | PCS                  | 1.397,30   |

23. If you want to add a text to the collective shipment, click on the **HTML Editor** option in the menu bar. You can enter the text in the window that appears. For more information on where the text is displayed and what options you have for formatting and designing the text, please refer to the sections [Create Document Pre-Text](#) and [Create Document Post-Text](#).

24. After entering the text, you can print the collective shipment using the **Print** button.

Please note that **Beyond CollectiveShipments** is based on **Beyond Reports**, i.e. the corresponding design of the area (i.e. the collective shipment) must be set up in **Beyond Reports**.