BEYOND
DATAIMPORTER

User Guide

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About BEYOND DataImporter

About this extension

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

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Beyond DataImporter allows you to import and process large amounts of data.
Load catalogs and price lists of your business partners into your system and import the contained items as non-stock items.
You only need to create an import template once for each file. All settings and assignments to the import template are saved for the next import.
This way, you can update the purchase prices of nonstock items with just a few clicks instead of tediously maintaining them manually.

The latest version of this documentation can be found at the following link: BEYOND DataImporter Documentation.

The examples described in this documentation represent only a part of the possibilities that the BEYOND DataImporter solution offers you. If you have a specific case that you would like to map via the solution, please feel free to contact us.

> ❶ **NOTE**
>
> **No dependencies from or to other apps**
>
> No dependent applications are required to use BEYOND DataImporter, i.e. you do not need to install any additional applications.

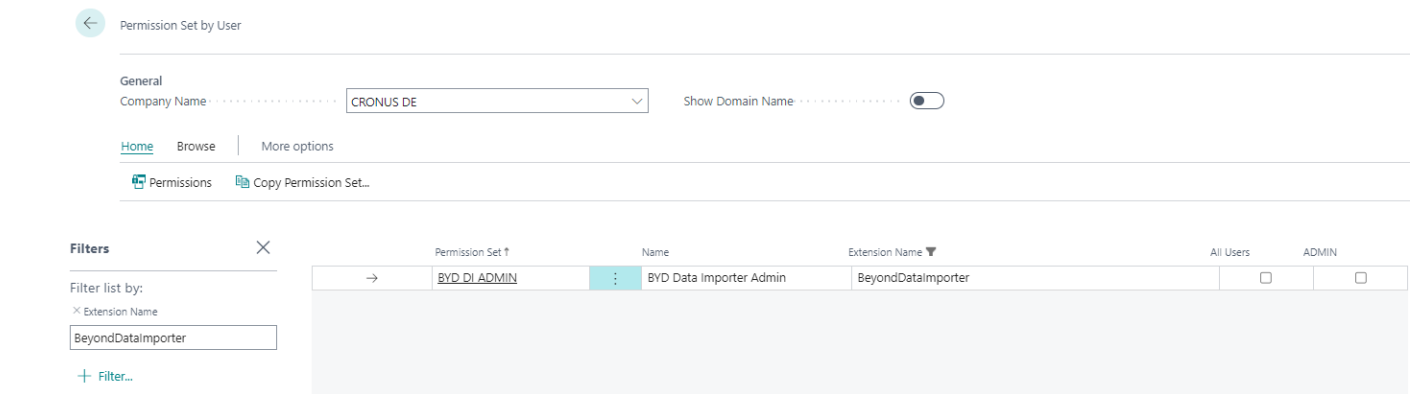| Version	Date	Author	Comment
1.0	16.01.2023	Jannic Weidel	Initial version of the documentation
1.1	16.05.2023	Jannic Weidel	Added Chapter for assigning permission sets
Access		public	

Assign User Permissions

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

Permission Set	Description
BYD DA ADMIN	This permission set enables the use of the **BeyondDataImporter** extension.

To assign the permission set for **BEYOND DataImporter** 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 **BeyondDataImporter** as filter criteria.
8. The list is filtered to the permission sets of **BeyondDataImporter**.
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 DataImporter** 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.

License Management

This chapter describes how you can view the license management of **Beyond DataImporter**.

To view the status of the product license for **Beyond DataImporter**, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Beyond License Management**.
2. The **Beyond License Management** page is displayed.

3. Under the **Licenses** section, you will find all product licenses for BeyondIT applications that have been installed for this company. You can read all the necessary information from the values in the columns:
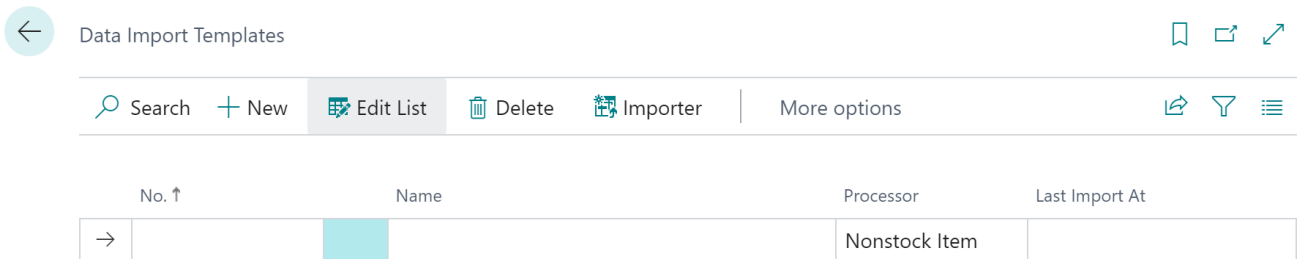
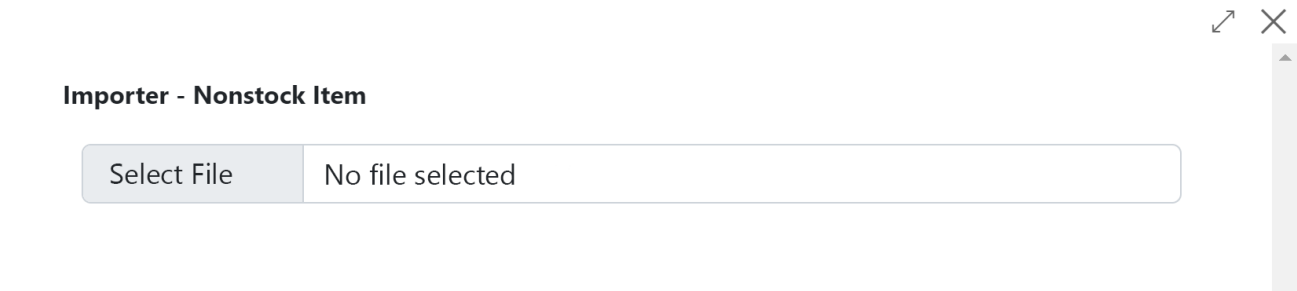| Column	Description
Company Name	This column indicates the name of the company.
Application Name	This column indicates the name of the application. If you use several BeyondIT products, a separate line is displayed for each product in the overview,
Status	This is the status of the product license. Several values are possible: **Valid**: The product license is valid and the application can be used without restrictions. **Expired**: The product license has expired. The application can no longer be used. **Trial**: The product license is valid and the functionalities of the application can be used for a short period of time (note the value in the **expiry date** column) with restrictions or without restrictions. **Exceeded**: The product license has expired. The application can no longer be used.
Start Date	This is the date on which the product license was registered.
Expiry Date	This is the date on which the product license becomes or became invalid. The application can no longer be used.
Trial	This checkbox indicates whether the product license is a trial license. Trial licenses are very limited licenses. You can purchase a full product license after the trial license expires (note the value in the **Expiry date** column).
Licensed Metric	This column shows how the application was licensed. For example, this can be a tenant license, a license per company or a license per user.
Current Metric	This column shows how many licenses are used in the environment. The difference between the values in the **Licensed metric** and **Current metric** columns indicates whether you need to purchase an additional license.

Import Non-Stock Items

This chapter describes how to import non-stock items from a file (for example, a price list). Note that this data must be available as an Excel file. Each row in the Excel table should be assigned to an item, while the properties to be imported and deposited as columns.

To import non-stock items, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Data Import Templates** and click on the corresponding search result.
3. The **Data Import Templates** list is displayed. On this page you can find all configured data import templates.
4. To create a new data import template, click **New** in the menu bar.

5. Enter a number for the data import template under the **No.** column.
6. Enter a name for the data import template under the **Name** column.
7. Specify a processor under the **Processor** column. A so-called processor processes the uploaded file (this is done later in this description) and imports the data into your Business Central. In this description we have used the **Nonstock Item** processor because we want to perform an import for nonstock items. If you need a processor that is not included in the scope of the application by default, we can create it for you individually. To do so, contact us at moin@beyondit.gmbh. If you use BEYOND Catalog in addition to BEYOND DataImporter, a bridge application (**Beyond DataImporterCatalogBridge**) ensures that you can import items as cross-client BEYOND Catalog Items (Nonstock Items). For more information on importing Beyond Catalog Items, see Import BEYOND Catalog Items.
8. Click **Importer** in the menu bar. A new window is displayed.

9. Click **Select file** and select the file in which the data you want to upload is stored.

Importer - Nonstock Item

| Select File | Catalog-Sample-Import-01-01-2020.xlsx | Save Template |

| | | | -100 | -10 | -1 | 000 | 1 | 10 | 100 |

Target	Source	Format
Manufacturer Code	⌄	BEYONDIT
Vendor No.	⌄	
Vendor Item No.	⌄	
Description	⌄	
Unit of Measure	⌄	
Published Cost	⌄	
Negotiated Cost	⌄	
Unit Price	⌄	
Gross Weight	⌄	
Net Weight	⌄	
Last Date Modified	⌄	TT.mm.jjjj 🗓
Bar Code	⌄	
Item Template Code	⌄	

Import File

10. The display of the window is updated after the file is uploaded. Subsequently, you need to map the data from the uploaded file to the fields in Business Central so that the data can be imported. In the following example, we explain how to do this.

11. The fields highlighted in color are mandatory fields, i.e. you must specify a value for these lines. Since in our example we are importing a product catalog from a single manufacturer, we can fix the value for the **Manufacturer Code** line under the **Format** column.

Importer - Nonstock Item

| Select File | Catalog-Sample-Import-01-01-2020.xlsx | Save Template |

| | | | -100 | -10 | -1 | 000 | 1 | 10 | 100 |

Target	Source	Format
Manufacturer Code	⌄	BEYONDIT

12. In the right column you will see a record from the uploaded file. In our example, the manufacturer code **BEYONDIT** is imported for all data records.

13. Under the **Format** column for the **Vendor No.** line, enter the number of the vendor in your system. Please note that this number must already be stored in the system, otherwise no records can be imported.

14. For the **Vendor Item No.** row, click in the **Source** column. Assign the correct column from the selection list (the available selection options correspond to the columns in the uploaded Excel file).

Importer - Nonstock Item

Select File	Catalog-Sample-Import-01-01-2020.xlsx

Target	Source	Format
Manufacturer Code	⌄	BEYONDIT
Vendor No.	⌄	V-001234656
Vendor Item No.	⌄	
Description		
Unit of Measure		
Published Cost		
Negotiated Cost		

Dropdown list:
- Item
- Description
- Unit of Measure
- Catalog Price
- Date of Pricing
- Discount Group
- Discount Percentage

15. Map the remaining fields as well (if possible).

Importer - Nonstock Item

Select File	Catalog-Sample-Import-01-01-2020.xlsx		Save Template

				-100	-10	-1	000	1	10	100

Target	Source	Format		
Manufacturer Code	⌄	BEYONDIT	X	BEYONDIT
Vendor No.	⌄	V-001234656	X	V-001234656
Vendor Item No.	Item ⌄			00000071016
Description	Description ⌄			BEYOND Sample Item
Unit of Measure	Unit of Measure ⌄			PIECE
Published Cost	⌄			
Negotiated Cost	Catalog Price ⌄			14,00
Unit Price	Recommended Sales Price ⌄			21,78
Gross Weight	⌄			
Net Weight	Weight ⌄			500
Last Date Modified	Date of Pricing ⌄	TT.mm.jjjj 🗓		01.01.2020
Bar Code	EAN/UPC ⌄			886661266555
Item Template Code	⌄	ITEM	X	ITEM

16 | 39 ms   Import File

16. You can check the mappings via the data set preview. The read out data is displayed in the third column (right column). Via the number bar above this column you can jump between the rows in the uploaded file and compare the data.
17. To import the data from the uploaded file, click **Import File**.
18. To save your settings and the mapping, click **Save Template**.

Your settings and mappings are saved in the file import template. The number of rows (records) to be imported is displayed at the bottom left (in our example it is 16 records). A process bar shows you the progress.