



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.

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	

[Continue with the next chapter](#)

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.

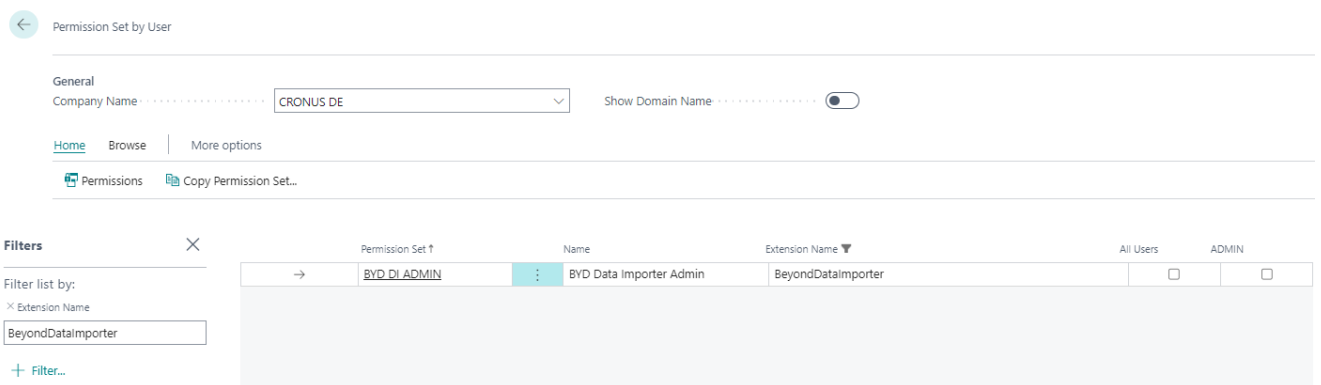


Figure: Permission Sets for BEYOND DataImporter

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.

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.

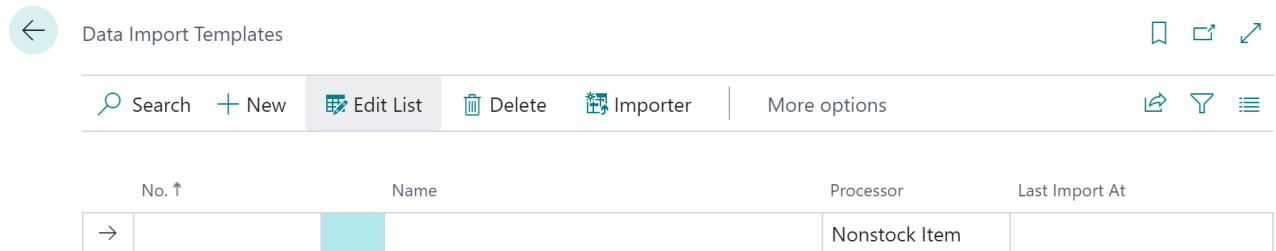


Figure: Data Import Template

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.

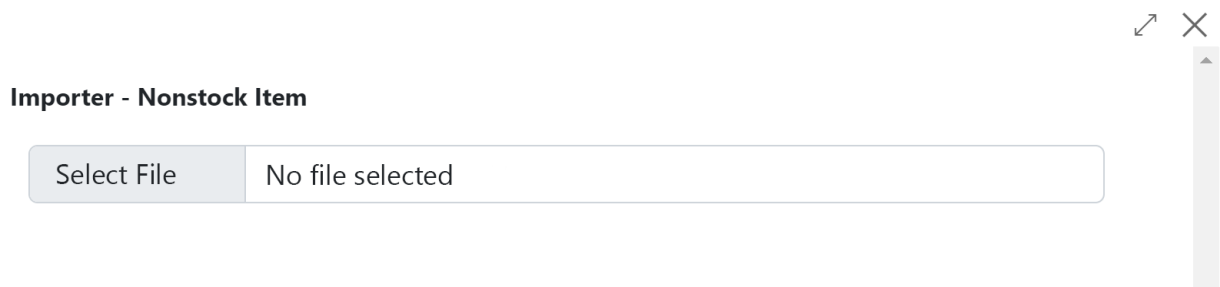


Figure: Upload File

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							
Target	Source	Format	-100	-10	-1	000	1	10	100
Manufacturer Code	<input type="text"/>	BEYONDIT							
Vendor No.	<input type="text"/>								
Vendor Item No.	<input type="text"/>								
Description	<input type="text"/>								
Unit of Measure	<input type="text"/>								
Published Cost	<input type="text"/>								
Negotiated Cost	<input type="text"/>								
Unit Price	<input type="text"/>								
Gross Weight	<input type="text"/>								
Net Weight	<input type="text"/>								
Last Date Modified	<input type="text"/>	TT.mm.jjjj							
Bar Code	<input type="text"/>								
Item Template Code	<input type="text"/>								

Import File

Figure: Import Product Catalog

- 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.
- 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							
Target	Source	Format	-100	-10	-1	000	1	10	100
Manufacturer Code	<input type="text"/>	BEYONDIT							

Figure: Enter Manufacturer Code

- 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.
- 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.
- 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

Target	Source	Format
Manufacturer Code	<input type="text" value="BEYONDIT"/>	BEYONDIT
Vendor No.	<input type="text" value="V-001234656"/>	V-001234656
Vendor Item No.	<input type="text" value="Item"/>	
Description	<input type="text" value="Description"/>	
Unit of Measure	<input type="text" value="Unit of Measure"/>	
Published Cost	<input type="text" value="Catalog Price"/>	
Negotiated Cost	<input type="text" value="Date of Pricing"/>	

Figure: Map Vendor Item No.

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

Importer - Nonstock Item

Select File Save Template

Target	Source	Format		
Manufacturer Code	<input type="text" value="BEYONDIT"/>	BEYONDIT	X	BEYONDIT
Vendor No.	<input type="text" value="V-001234656"/>	V-001234656	X	V-001234656
Vendor Item No.	Item			0000071016
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

Figure: Full Mapping of the Excel Data to Fields in Business Central

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.