



BEYOND

DocumentLineTransfer

User Guide



BEYONDIT GmbH

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

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About BEYOND DocumentLineTransfer

About this Extension

BEYOND DocumentLineTransfer 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

The **Beyond DocumentLineTransfer** application allows you to import or export document lines as CSV or TXT files. This functionality is supported for the following documents:

Purchase	Sales	Service
Purchase Order	Sales Order	Service Item Worksheet

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

The examples described in this documentation represent only a part of the possibilities that the Beyond DocumentLineTransfer 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

Dependencies from or to other apps

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

- [BEYOND License](#): Management of trial and full licenses for apps from BeyondIT.

Version	Date	Author	Comment
1.0	21.08.2024	Jannic Weidel	Initial version of the documentation
Access		public	

[Continue with the next chapter](#)

Setup Beyond DocumentLineTransfer

This chapter describes how to set up **Beyond DocumentLineTransfer**.

Beyond DocumentLineTransfer allows you to both import and export document lines. In addition, there are various import and export formats that you must define in advance.

To set up **Beyond DocumentLineTransfer**, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Document Line Transfers**.
2. The **Document Line Transfers** page is displayed.

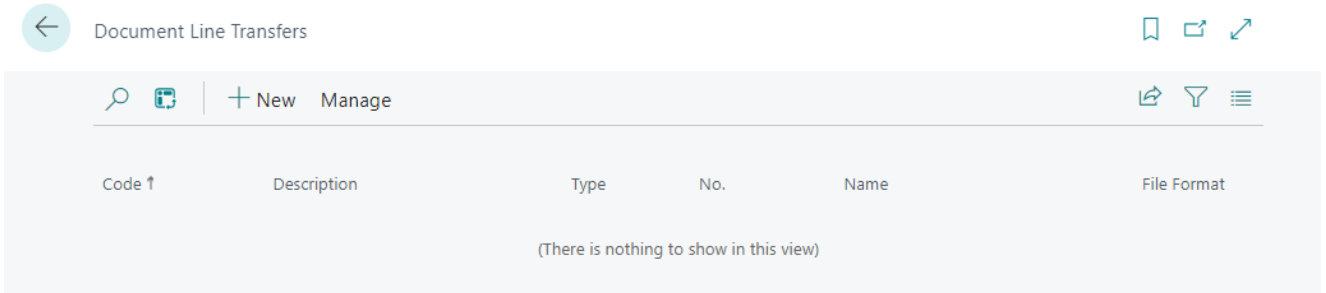


Figure: Document Line Transfers

3. Click on the **New** option in the menu bar to create a new document line transfer order.
4. A new card is displayed.

Column No. ↑	Field No.	Field Caption	Column Name	Validation Sequence No.
→				

Figure: New Document Line Transfer Order

5. Enter a unique code for the document line transfer in the **Code** field.
6. Add a more detailed description for the document line transfer in the **Description** field.
7. In the **Type** field, define the business area for which the import or export of the document lines is to be used.
8. Depending on the setting in the **Type** field, you can use the **No.** field to specify a customer or vendor number for which the document line transfer order created can be used. The name of the customer or vendor is automatically added to the **Name** field after the number has been entered.
9. You can specify the format of the input or output file in the **File Format** field. You can import or export the document lines either as a TXT file or as a CSV file.
10. In the **Field Separator** field, you can define the separator for specifying values. By default, the semicolon is used on a

new document line transfer order card.

11. You can use the **Has Headline** field to specify that the input or output file contains a line for labeling the field values to be imported or exported.
12. Define the file information under the **Columns** tab. Specify how many columns are contained in the file to be exported or imported and which information in the corresponding column is transferred to or from Business Central.

You have created a document line transfer order. This can be used in the corresponding documents for importing or exporting lines.

Example

Below you will find an example of a possible configuration. The order has been configured so that a CSV file is used as the file format. This file is only used for purchasing documents from the vendor **Fabrikam**. The file information is separated by a semicolon and no headline is used in the file. The information **Line No.**, **Item No.**, **Description** and **Quantity** can be imported or exported.

Document Line Transfer

General

Code PURCHASE CSV Name Fabrikam, Inc.

Description Comma separated Import and Exp File Format Text

Type Purchase Field Separator ;

No. 10000 Has Headline

Columns | [New Line](#) | [Delete Line](#)

Column No. ↑	Field No.	Field Caption	Column Name	Validation Sequence No.
1	4	Line No.	Line No.	
2	6	No.	No.	
3	11	Description	Description	
→ 4	15	Quantity	Quantity	

Figure: Configured Document Line Transfer Order

Assign User Permissions

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

Permission Set	Description
BYD DT Reader	This permission set enables the reading of data from the Beyond DocumentLineTransfer extension.
BYD DT User	This permission set enables the use of the Beyond DocumentLineTransfer 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 DT Admin	This permission set gives the assigned user administrative access to the Beyond DocumentLineTransfer extension and the associated setup.

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

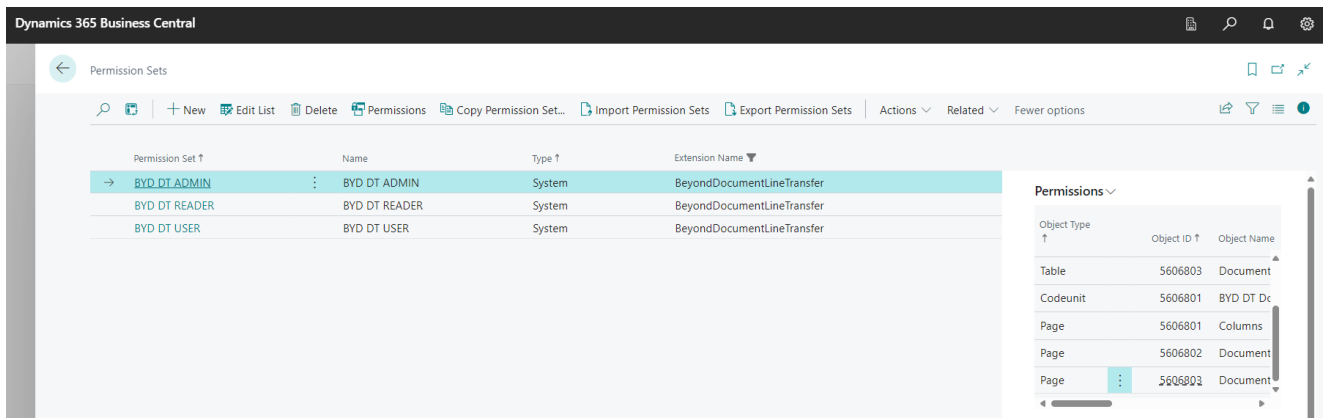


Figure: Permission Sets for BEYOND DocumentLineTransfer

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

Export Document Line

This chapter describes how to export a document line from Business Central via the **Beyond DocumentLineTransfer** app. Please note that you must configure a document line transfer order before exporting the document line; you can find more information on this in the chapter [Setup Beyond DocumentLineTransfer](#).

To export a document line, proceed as follows:

1. Open the document from which you want to export one or more document lines.
2. Click on the **Document Line Transfer** option in the menu bar and select **Export Document Line Transfer**.

The screenshot shows the 'Purchase Order' page for '106001 · Fabrikam, Inc.'. The 'Document Line Transfer' menu is open, with 'Export Document Line Transfer' selected. The 'General' section displays the following details:

Vendor Name	Fabrikam, Inc.	Vendor Invoice No.	5755
Contact	Krystal York	Vendor Shipment No.	
Document Date	08.04.2024	Status	Open

The 'Lines' section shows a table with one line item:

HTML Text exists	Page Break	Type	No.	Variant Code	Item Reference No.	Description	Location Code	Bin Code	Q
-	:	<input type="checkbox"/>	Item	1896-S		ATHENS Desk			

Figure: Export Document Line

The file is downloaded. The chapter [Import Document Line](#) describes how you can import document lines.

Import Document Line

This chapter describes how to import a document line from Business Central via the **Beyond DocumentLineTransfer** app. Please note that you must configure a document line transfer order before exporting the document line; you can find more information on this in the chapter [Setup Beyond DocumentLineTransfer](#).

To import a document line, proceed as follows:

1. Open the document from which you want to import one or more document lines.
2. Click on the **Document Line Transfer** option in the menu bar and select **Import Document Line Transfer**.

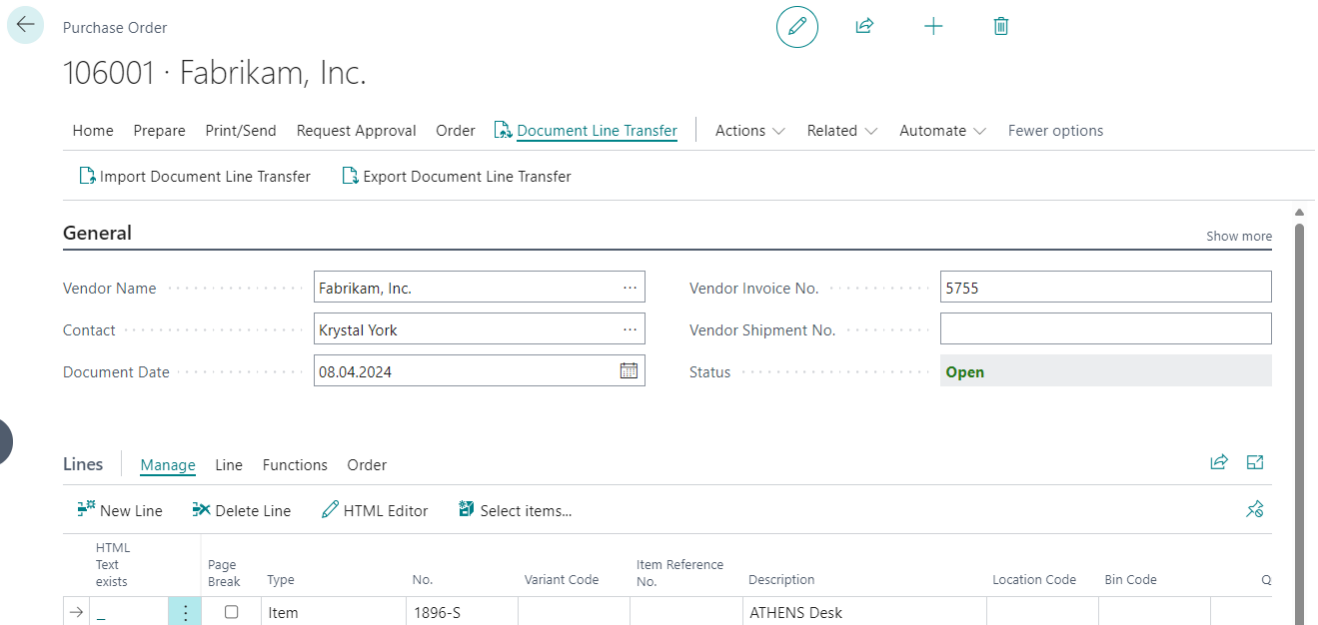


Figure: Import Document Line

3. Specify the file to be imported in the dialog and upload it.

You have added one or more document lines to the document. The [Export Document Line](#) chapter describes how you can export document lines.