



BEYOND INVENTORYDETAILS

User Guide



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Preface

This documentation contains information on how to install and operate **Beyond InventoryDetails** in your Business Central environment.

This documentation is intended for experienced users of Business Central. Additional knowledge of third-party software products may be required to set up **Beyond InventoryDetails**.

Read this documentation in full to set up **Beyond InventoryDetails** and work with it professionally. Pay particular attention to the tips, information and safety instructions contained in the documentation. Inform your employees about the proper use of **Beyond InventoryDetails** and keep the documentation in a place that is accessible to your employees.

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Manufacturer

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VISIT
APPSOURCE

Version history

| Version | Date | Author | Comment |
|---------|------------|---------------|--|
| 1.0 | 06.04.2023 | Jannic Weidel | Initial version of the documentation |
| 1.1 | 12.05.2023 | Jannic Weidel | Added Chapter for assigning permission sets |
| 1.2 | 22.02.2024 | Jannic Weidel | Added Description for Item Variant Inventory |
| 1.3 | 04.06.2025 | Jannic Weidel | Added Description for Quick Transfer Feature |
| Access | | public | |

General Information

This documentation contains important information that you must observe when following the descriptions. The information is highlighted as notes and arranged according to type and importance. The notes are listed below in ascending order of importance:

TIP

This represents **no risk**. In addition to the classic clicking on options, Business Central also offers the option of using so-called shortcuts. Shortcuts are key combinations with which you can also execute the desired action in the user interface. By using shortcuts, you can work faster and more effectively. Try the key combination and you will be surprised how much faster you can work.

NOTE

This represents **no risk**. This note contains important information on the correct use, configuration or operation of the software. Follow these instructions to avoid inefficiencies and unnecessary support tickets. For example, this note can show you that an option is hidden and tells you how to proceed if you want to show it again.

IMPORTANT

This represents a **low risk**. This notice refers to non-critical issues that may lead to undesired behavior or configuration problems. May affect user experience or functionality if not considered.

CAUTION

This represents a **medium risk**. This notice indicates a potential problem that could affect system stability or data integrity. Failure to comply may result in errors, loss of performance or partial service interruptions. The errors caused by non-compliance only affect the app itself and prevent you from working with data within the app.

WARNING

This represents a **high risk**. This notice indicates an immediate and serious risk to the productive system. Failure to observe this warning may affect the entire system. There is a risk of loss of critical data or total system failure, leading to prolonged downtime. It may not be possible to restore the data and a backup must be imported.

Beyond InventoryDetails is an extension for Microsoft Dynamics 365 Business Central.

The app shows you important information about your inventory (also about several companies in your environment). The solution expands the factbox area on the following pages:

- Item Card
- Item List
- Purchase Order
- Sales Order
- Service Item Worksheet

The factbox area is extended with three areas. The first area is **Item Inventory**. This area contains a table with the fields **Location Code**, **Bin Code**, **Inventory**, **Quantity on Purchase Order**, **Available Inventory** and **Avg. Purchase Costs**. This information gives you a precise overview of items and their stock quantities. The solution also allows you to view data (company name, location code and stock) from other companies in your Business Central environment.

The second section **Item Inventory by Company** shows which company has which quantity of the selected item in its stock (together with the location of the item).

The third section **Item Variant Inventory** shows which item variants of the item are in stock in the storage locations in your company.

The app also allows you to carry out so-called quick stock transfers. Further information on quick transfers can be found in the chapter [Quick Transfer Items](#).

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

NOTE

Dependencies from or to other apps

Additional, basic applications are required to use **Beyond InventoryDetails**. The following applications are required to use **Beyond InventoryDetails** and are automatically installed and licensed:

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

License Management

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

To view the status of the product license for **Beyond InventoryDetails**, 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.

Beyond License Management

Tenant ID

Tenant Domain Name

Licenses

Sync License

| Company Name T | Application Name | Status | Start Date | Expiry Date | Trial | Licensed Metric | Current Metric |
|----------------|----------------------------|--------|------------------|------------------|--------------------------|-----------------|----------------|
| → | BeyondCalculation | Valid | 23.08.2024 08:50 | 22.09.2030 08:50 | <input type="checkbox"/> | 1 | 0 |
| | BeyondServiceRequestion | Valid | 02.04.2024 09:13 | 02.05.2030 09:13 | <input type="checkbox"/> | 1 | 0 |
| | BeyondPostCalculation | Valid | 14.06.2024 09:33 | 13.06.2030 09:33 | <input type="checkbox"/> | 1 | 0 |
| | BeyondReportReview | Valid | 15.07.2024 21:26 | 14.06.2030 21:26 | <input type="checkbox"/> | 1 | 0 |
| | BeyondService | Valid | 30.01.2024 07:41 | 28.02.2030 07:41 | <input type="checkbox"/> | 7 | 0 |
| | BeyondCues | Valid | 29.11.2023 19:15 | 28.02.2030 07:41 | <input type="checkbox"/> | 7 | 0 |
| | BeyondInventoryDetails | Valid | 29.01.2024 23:28 | 28.02.2030 07:41 | <input type="checkbox"/> | 7 | 0 |
| | BeyondDataImporter | Valid | 17.06.2024 22:55 | 17.07.2030 22:55 | <input type="checkbox"/> | 1 | 0 |
| | BeyondCloudConnector | Valid | 04.07.2024 06:42 | 03.08.2030 06:42 | <input type="checkbox"/> | 1 | 0 |
| | BeyondAttributionCore | Valid | 14.06.2024 07:51 | 14.07.2030 07:51 | <input type="checkbox"/> | 1 | 0 |
| | BeyondReports | Valid | 05.07.2024 06:39 | 04.06.2030 06:39 | <input type="checkbox"/> | 1 | 0 |
| | BeyondDocumentLineTransfer | Valid | 19.06.2024 20:40 | 31.12.2099 00:00 | <input type="checkbox"/> | 4 | 0 |

- 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 | <p>This is the status of the product license. Several values are possible:</p> <p>Valid: The product license is valid and the application can be used without restrictions.</p> <p>Expired: The product license has expired. The application can no longer be used.</p> <p>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.</p> <p>Exceeded: The product license has expired. The application can no longer be used.</p> |
| 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. |

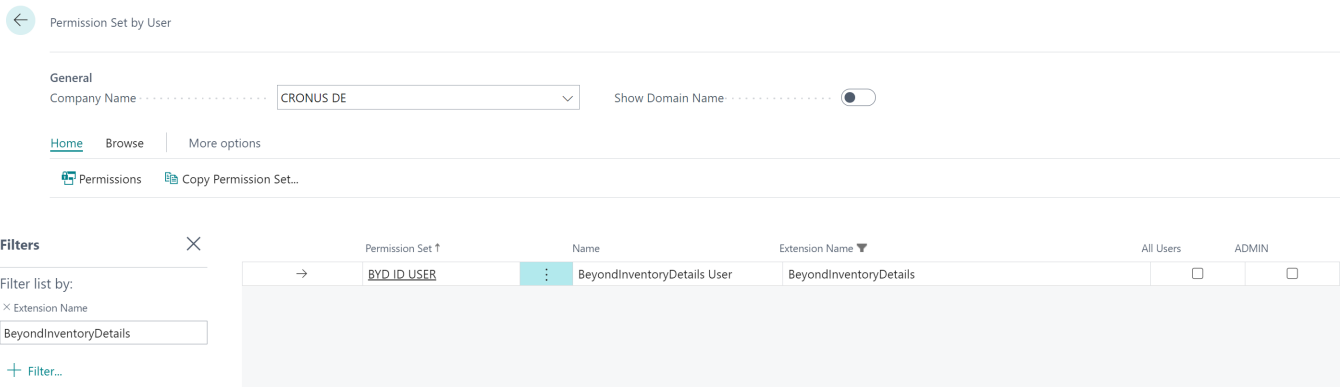
Assign User Permissions

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

| Permission Set | Description |
|----------------|---|
| BYD ID USER | This permission set enables the use of the BeyondInventoryDetails extension. |

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

Show Item Variant Inventory

This chapter describes how to show the **Item Variant Inventory** area in the factbox area of **Beyond InventoryDetails**. This area can only be displayed on the following pages and cards:

- Item Card
- Item List
- Item Variants
- Purchase Order
- Requisition Worksheets
- Sales Order
- Service Item Worksheet (Worksheet)

To display the **Item Variant Inventory** area in the factbox area, you must personalize the corresponding page as follows:

1. Navigate to one of the above-mentioned pages or cards and click on the gear icon in the top right-hand corner of the screen.
2. Select the **Personalize** option from the dropdown menu.

The screenshot shows the Dynamics 365 Business Central interface. The main table displays 'Item Variant Inventory' with columns for No., Description, Type, Inventory, Subst... Exist, Assem... BOM, Production BOM No., Routing No., Base Unit of Measure, Cost is Adj., Unit Cost, Unit Price, and Vendor No. The table lists various items like 'ATHENS Schubladenelement', 'LONDON Schreibtischstuhl, blau', etc. On the right, a dropdown menu is open, showing options: Personalize, Design, My Settings, Company information, Assisted setup, and Advanced settings. The 'Personalize' option is selected, and a sub-menu is visible with 'Item Inventory' highlighted.

3. The display is updated and shows the **Item Variant Inventory** area in the factbox area with a hatch.
4. Move the mouse pointer to the created area **Item Variant Inventory**.

The screenshot shows the Dynamics 365 Business Central interface. The main table displays 'Item Variant Inventory' with columns for No., Description, Type, Inventory, Subst... Exist, Assem... BOM, Production BOM No., Routing No., Base Unit of Measure, Cost is Adj., Unit Cost, Unit Price, and Vendor No. The table lists various items like 'ATHENS Schubladenelement', 'LONDON Schreibtischstuhl, blau', etc. On the right, a dropdown menu is open, showing options: Personalize, Design, My Settings, Company information, Assisted setup, and Advanced settings. The 'Personalize' option is selected, and a sub-menu is visible with 'Item Inventory' highlighted. A red flag is visible in the factbox area, indicating that the area is currently hidden.

5. Left-click on the red flag in the hatching area and select the **Show** option from the menu.
6. The hatching of the area is hidden and indicates that this area has been shown on the page or card.
7. Click on the **Done** option at the top of the screen to complete the personalization of the page. The personalization you

have made only applies to your user and the corresponding page, i.e. you must personalize each card or page in this way if you want the **Item Variant Inventory** area to be displayed there.

[Next Chapter](#)

Quick Transfer Items

This chapter describes how you can quickly transfer an item. The function supports you if you want to consolidate item stocks in a warehouse or, for example, transfer items to a storage bin for service employees so that these items are available immediately at the start of the service order.

You can use quick transfer for the following tasks:

- Transferring items within a storage location from storage bin to another storage bin
- Transferring items between two storage locations from storage bin to storage bin
- Transferring items between two storage locations from a storage bin to a location without storage bins

TIP

Show or hide fact box

If the factbox area is not displayed, you can show it on the available cards and lists using the key combination **ALT+F2**. Press the key combination again to hide the factbox area again. For more information on which pages, cards and lists the factbox area has been extended by **Beyond InventoryDetails**, please refer to the chapter [About this app](#).

[!INFO]

User permissions required

Appropriate user permissions are required to use Beyond **InventoryDetails**. Further information on user permissions can be found in the chapter [Assign User Permissions](#).

[!INFO]

Factbox areas are not displayed

It is also possible that the areas of **Beyond InventoryDetails** are hidden via personalization. For more information on the personalization function of pages, see the standard documentation of Business Central under [Personalize your workspace](#).

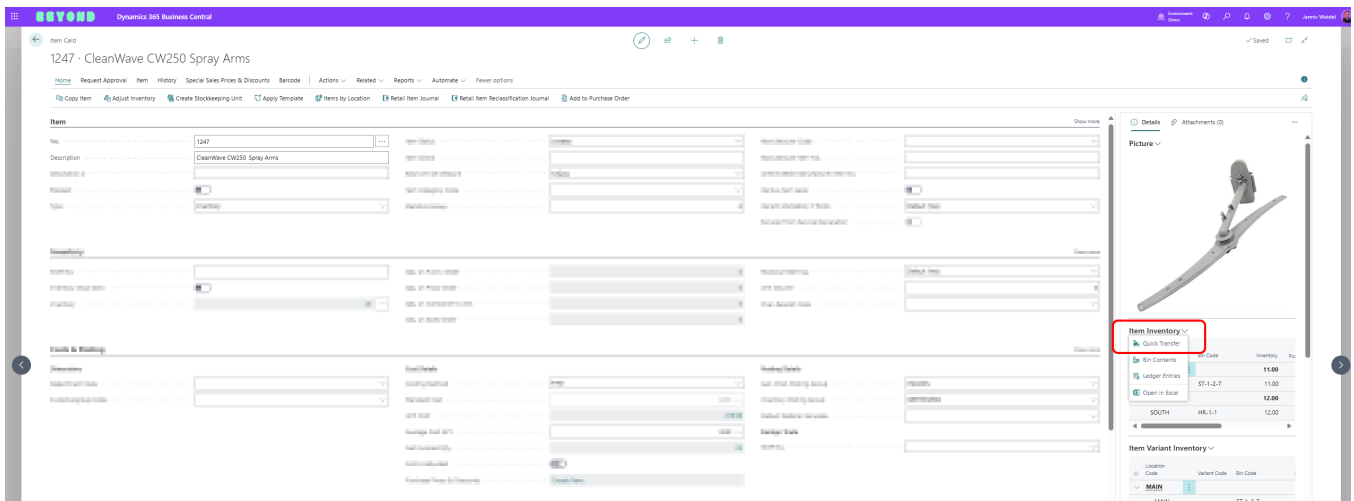
CAUTION

Display of item stocks

Beyond InventoryDetails can only display item quantities that are available in storage locations with storage bins. If you use the **Quick Transfer** function and transfer an item quantity to a storage location that is managed without storage bins, this item quantity is not displayed in the **Beyond InventoryDetails** factbox area.

The **Item Inventory** area is displayed in the factbox area. This area contains information on the selected item (location, inventory, bin, etc.). The function on the item card is described below. To transfer an item quickly, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Items** and click on the corresponding search result.
3. The **Items** list is displayed.
4. Open the card for the item you want to transfer.
5. To quickly transfer an item, click on the dropdown menu in the **Item Inventory** area of the factbox.
6. Click on the **Quick Transfer** option in the context menu.



7. The **Quick Transfer** window is displayed:

Quick Transfer - JANNIC.WEIDEL

| | |
|-----------------------------|---------------|
| User Id | JANNIC.WEIDEL |
| Item No. | 1247 |
| Transfer-from Location Code | MAIN |
| Transfer-from Bin Code | ST-1-2-7 |
| Transfer-to Location Code | MAIN |
| Transfer-to Bin Code | |
| Quantity | 11.00 |

OK Cancel

User id: This field shows the user account with which you are currently logged into the environment.

Item No.: This field shows the number of the item for which you want to carry out a quick transfer. By default, this field is already pre-assigned with the number of the item for which you have called up this function.

Transfer-from Location Code: This field shows the storage location that serves as the starting point for the quick transfer of the item.

Transfer-from Bin Code: This field shows the storage bin in the corresponding storage location that serves as the starting point for the quick transfer of the item.

Transfer-to Location Code: This field shows the storage location to which the item is transferred via the function.

Transfer-to Bin Code: This field shows the storage bin in the corresponding storage location to which the item is transferred using the function.

Quantity: This field shows the quantity of the item that you want to move via the quick transfer. By default, the total item quantity in the corresponding storage bin is pre-assigned by the system.

8. Edit the information.

9. To perform the quick transfer, click on **OK**.

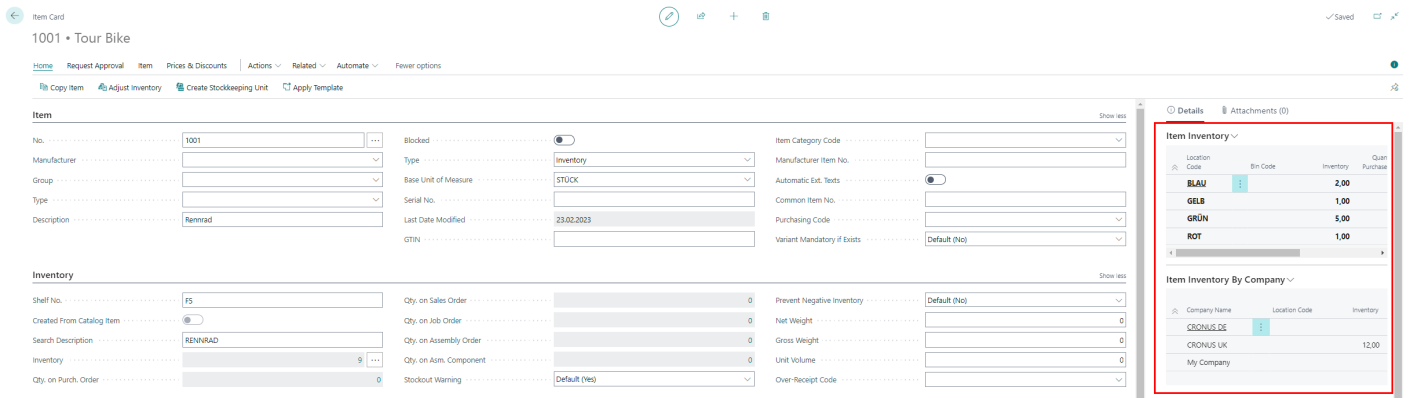
You have quickly transferred an item.

Technical Description

Beyond InventoryDetails extends the following pages:

- Item Card
- Item List
- Item Variant
- Purchase Order
- Requisition Worksheet
- Sales Order
- Service Item Worksheet (Service Worksheet)

On the pages, three new tabs (**Item Inventory**, **Item Inventory by Company** and hidden by default **Item Variant Inventory**) are added in the factbox (**ALT+F2**). The following screenshot shows an example of two of the tabs in the factbox on the item card:



Item Inventory

The **Item Inventory** tab is displayed in the factbox area. The tab displays the inventory-related information for the selected item.

The information includes:

- Location Code
- Bin Code
- Inventory
- Quantity on Purchase Order
- Available Inventory
- Average Purchase Costs

Details Attachments (0)

Item Inventory

| Location Code | Bin Code | Inventory | Quantity Purchase |
|---------------|----------|-----------|-------------------|
| BLAU | : | 2,00 | |
| GELB | | 1,00 | |
| GRÜN | | 5,00 | |
| ROT | | 1,00 | |

In addition to the **Item Inventory** tab, the **Item Inventory by Company** tab is added to the Factbox.

Item Inventory by Company

The **Item Inventory by Company** tab shows you item inventory information for other companies in your environment. You will see the following important information sorted by company:

- Company
- Location Code

Item Inventory By Company ▾

| ⌵ Company Name | Location Code | Inventory |
|------------------|---------------|-----------|
| <u>CRONUS DE</u> | ⋮ | |
| CRONUS UK | | 12,00 |
| My Company | | |
| | | |

- Inventory

Item Variant Inventory

The **Item Variant Inventory** tab shows you information about the inventory of item variants. The following important information is displayed:

- Location Code
- Variant Code
- Bin Code
- Inventory
- Quantity on Purchase Order
- Available Inventory
- Average Purchase Cost

By default, this area is hidden in the factbox area; you must customize and show it via personalization. You can find more information on this in the chapter [Show Item Variant Inventory](#).