BEYOND
TRADEIN

User Guide

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About BEYOND TradeIn

About this Extension

BEYOND TradeIn is an extension for Microsoft Dynamics 365 Business Central.
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BEYOND TradeIn allows you to take items in payment. The trade-in is similar to a sales claim. In the process a sales credit memo is created for the business partner.

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

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

Documentation Information

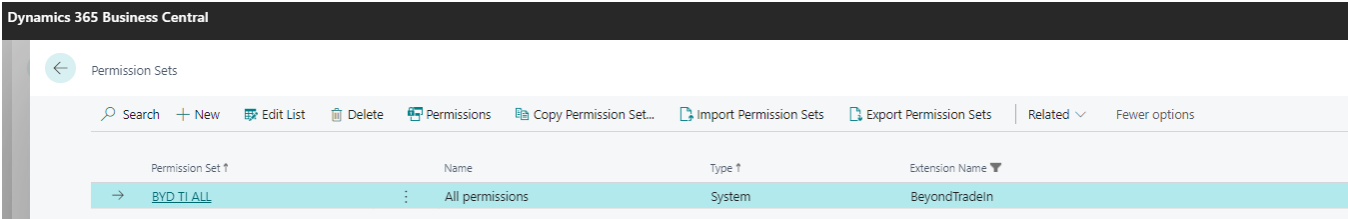| Version	Date	Autor	Comment
1.0	08.05.2023	Jannic Weidel	Initial (English) Version of the documentation
Document Access		public	

Set up User Permissions for Trade-In

Special user authorizations are required to use BEYOND TradeIn. This chapter describes how to assign the authorization to use BEYOND TradeIn to a user.

To assign the user authorization for BEYOND TradeIn 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 corresponding search result.
3. The **Permission Sets** page is displayed.
4. Select the **BYD TI ALL** permission set from the list.
5. Click **Related** > **Permissions** > **Permission Set by User** in the menu bar.

6. The **User Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and use **Permission Set** and the value **BYD TI ALL** as filter criteria.
8. The list is filtered to the permission set **BYD TI ALL**.
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 rights for BEYOND TradeIn to a user. The user can now perform the setup for BEYOND TradeIn. Note that users with the **SUPER** authorization can also perform the setup for BEYOND TradeIn, so it is not necessary to assign the **BYD TI ALL** authorization if the user is already assigned the **SUPER** authorization set.

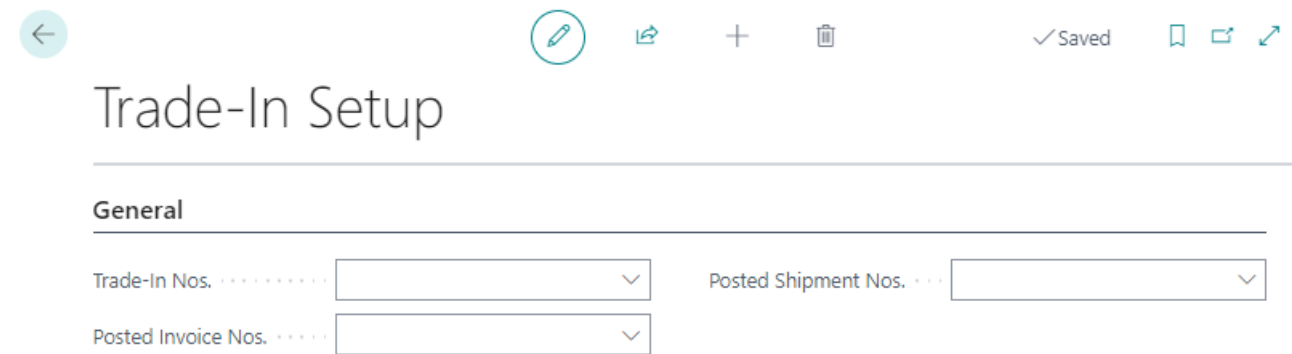Setup BEYOND TradeIn

Set Up BEYOND TradeIn

This chapter describes how to set up number series for use with BEYOND TradeIn. Note that certain user permissions (**SUPER** or **BYD TI ADMIN**) are required to set up BEYOND TradeIn. The contents of this chapter are divided into the following sections:

- Create a Number Series for Trade-Ins
- Create a Number Series for Posted Shipments
- Create a Number Series for Posted Invoices
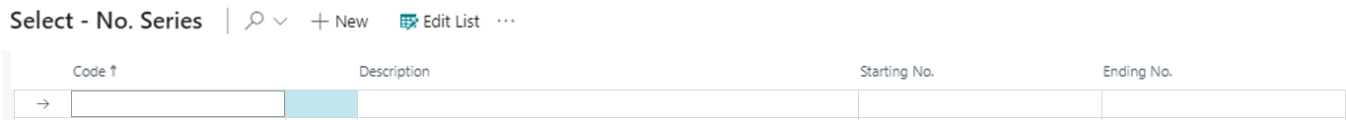- Copy Line Description to G/L Entry

Create a Number Series for Trade-Ins

This section describes how to set up the number series for trade-ins.
To set up the number series, proceed as follows:

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

4. Expand the dropdown menu for the **Trade-In Nos.** field.
5. Click the **Select from full list** option.
6. The window **Select - No. Series** is displayed.

7. To create a new number series, click **New** in the menu bar.
8. A new line is created.
9. Enter a code for the new number series under the **Code** column.
10. Enter a description for the new number series under the **Description** column.
11. Click in the input field under the **Starting No.** column.
12. The **Edit - No. Series Lines** window is displayed.
13. Under the **Starting Date** column, specify a date from which the number series should be used. You can specify the value **t** if the number series is to be used from today.
14. Define the start of the number series under the **Starting No.** column. For more information on number series, see the default help from Microsoft Business Central.
15. Click **Close** to finish setting up the number series lines and return to the **Edit - No. Series Lines** window.
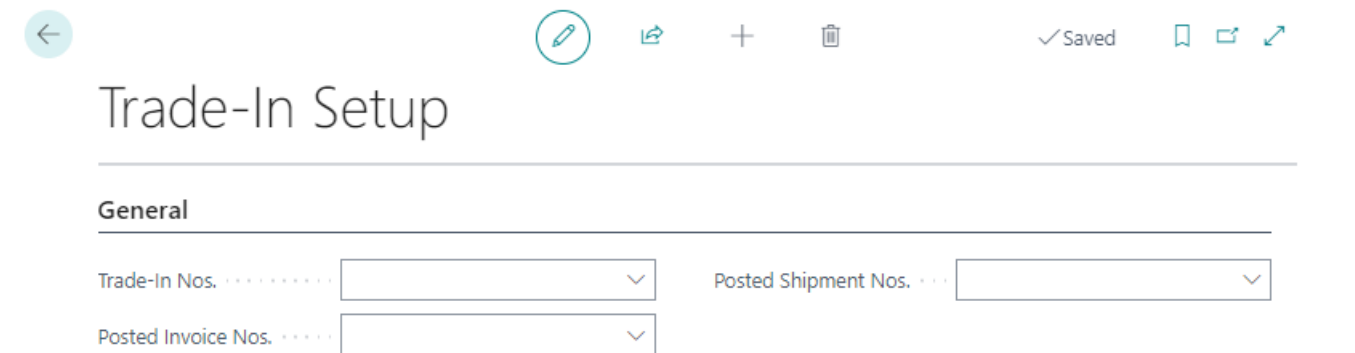16. Activate the **Default Nos.** checkbox for the created number series.

You have created the number series for trade-ins.

Create a Number Series for Posted Shipments

in diesem Abschnitt wird beschrieben, wie Sie die Nummernserie für gebuchte Lieferungen einrichten.

Um die Nummernserie einzurichten, gehen Sie wie folgt vor:

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

4. Expand the dropdown menu for the **Posted Shipment Nos.** field.
5. Click the **Select from full list** option.
6. The window **Select - No. Series** is displayed.

7. To create a new number series, click **New** in the menu bar.
8. A new line is created.
9. Enter a code for the new number series under the **Code** column.
10. Enter a description for the new number series under the **Description** column.
11. Click in the input field under the **Starting No.** column.
12. The **Edit - No. Series Lines** window is displayed.
13. Under the **Starting Date** column, specify a date from which the number series should be used. You can specify the value **t** if the number series is to be used from today.
14. Define the start of the number series under the **Starting No.** column. For more information on number series, see default help from Microsoft Business Central.
15. Click **Close** to finish setting up the number series lines and return to the **Edit - No. Series Lines** window.
16. Activate the **Default Nos.** checkbox for the created number series.

You have created the number series for posted Shipment Nos.

Create a Number Series for Posted Invoices

This section describes how to set up the number series for posted invoices.
To set up the number series, proceed as follows:

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

Trade-In Setup

General

Trade-In Nos. · · · · · · · · [⌄]   Posted Shipment Nos. · · · [⌄]

Posted Invoice Nos. · · · · · [⌄]

4. Expand the dropdown menu for the **Posted Invoice Nos.** field.
5. Click the **Select from full list** option.
6. The window **Select - No. Series** is displayed.

Code ↑	Description	Starting No.	Ending No.
→			

7. To create a new number series, click **New** in the menu bar.
8. A new line is created.
9. Enter a code for the new number series under the **Code** column.
10. Enter a description for the new number series under the **Description** column.
11. Click in the input field under the **Starting No.** column.
12. The **Edit - No. Series Lines** window is displayed.
13. Under the **Starting Date** column, specify a date from which the number series should be used. You can specify the value **t** if the number series is to be used from today.
14. Define the start of the number series under the **Starting No.** column. For more information on number series, see default help from Microsoft Business Central.
15. Click **Close** to finish setting up the number series lines and return to the **Edit - No. Series Lines** window.
16. Activate the **Default Nos.** checkbox for the created number series.

You have created the number series for Posted Invoice Nos.

Copy Line Description to G/L Entry

This section describes how to set the line description to be copied to G/L Entry. This setting is required so that you can create trade-ins.

To set line descriptions to be copied to G/L entries, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Sales & Receivables Setup** and click on the corresponding search result.
3. The **Sales & Receivables Setup** page is displayed.
4. Under the **General** tab, enable the slider for **Copy Line Description to G/L Item**. If the slider is not displayed, click the **Show more** option under the tab.

Sales & Receivables Setup

Customer Groups   Payments | More options

General   Show less

Copy Line Descr. to G/L Entry ········ 〔ON〕

You have set to copy line descriptions to G/L entry. You have completed the setup of BEYOND TradeIn and can create trade-ins.
For more information, see the chapter Create Trade-In.

Create Trade-In

This chapter describes how to create a trade-in.

To create a trade-in, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for [Trade-Ins](#) and click on the appropriate search result.
3. The **Trade-Ins** page is displayed.
4. To create a new trade-in, click **New** in the menu bar.
5. Under the **General** tab, specify a customer for the trade-in. The customer in this case is the business partner returning the items.
6. Click **Prepare** > **Get Posted Document Lines to Reverse…** in the menu bar.
7. The **Posted Sales Document Lines** window is displayed.

8. In the **Options** tab you can select the following options:
   - **Show Reversible Lines Only**: Specifies if only lines with quantities that are available to be reversed are shown. For example, on a posted sales invoice with an original quantity of 20, and 15 of the items have already been returned, the quantity that is available to be reversed on the posted sales invoice is 5.
   - **Show Reversible Lines Only**: Specifies whether to use the original quantity to receive quantities associated with specific shipments. For example, on a posted sales invoice with an original quantity of 20, you can match the 20

items with a specific shipment.

9. In the dropdown menu for the **Document Type Filter** field, you can select the type of document for which you want to display the lines in the **Lines** tab. The number of documents is displayed below that dropdown menu.
10. To transfer a document line from the **Lines** tab to the trade-in, click on the digit under the **Document No.** column.
11. The document line will be transferred to the trade-in. In addition to this, lines of the type **Comment** are generated, which contain important information about the invoice number as well as delivery number.

← Trade-In

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Home   Prepare   Print/Send   Request Approval   Return Order | More options

General >

Lines | Manage   Functions   Line   Fewer options

	Type		No.	VAT Prod. Posting Group	Description
→	Item	⋮	1006	*MWST.19*	Farming Machine
	Comment				Invoice No. 103001:
	Comment				Ref.-No. 103001 - Shipment No. 102001

You have created a trade-in.

To book the trade-in, click **Home** > **Post** in the menu bar as usual.