



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.

It was developed by:

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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](#).

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	

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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.

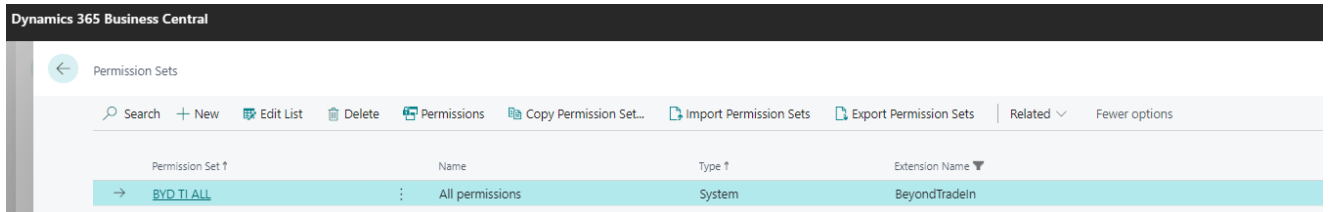


Figure: Permission Set for BEYOND TradeIn

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:

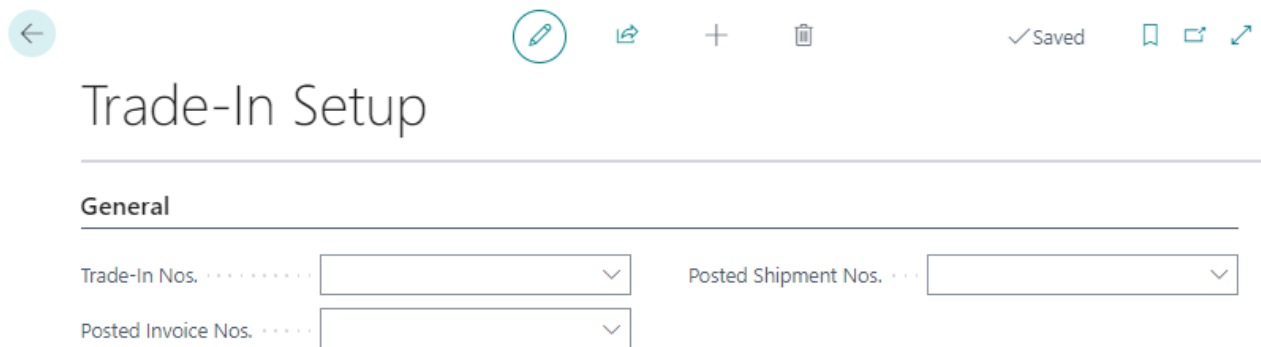
- [Create a Number Series for Trade-Ins](#)
- [Create a Number Series for Posted Shipments](#)
- [Create a Number Series for Posted Invoices](#)
- [Copy Line Description to G/L Entry](#)

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.



The screenshot shows the 'Trade-In Setup' page. At the top, there is a navigation bar with a back arrow, a pencil icon, a plus sign, a trash icon, and a 'Saved' status. Below the navigation bar is the title 'Trade-In Setup'. Underneath the title is a 'General' section with three dropdown menus: 'Trade-In Nos.', 'Posted Invoice Nos.', and 'Posted Shipment Nos.'.

Figure: Trade-In Setup

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.



The screenshot shows the 'Select - No. Series' window. The title bar contains 'Select - No. Series', a search icon, a '+ New' button, and an 'Edit List' button. Below the title bar is a table with columns: 'Code', 'Description', 'Starting No.', and 'Ending No.'.

Figure: Create Number Series

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 [Create number series](#).
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.

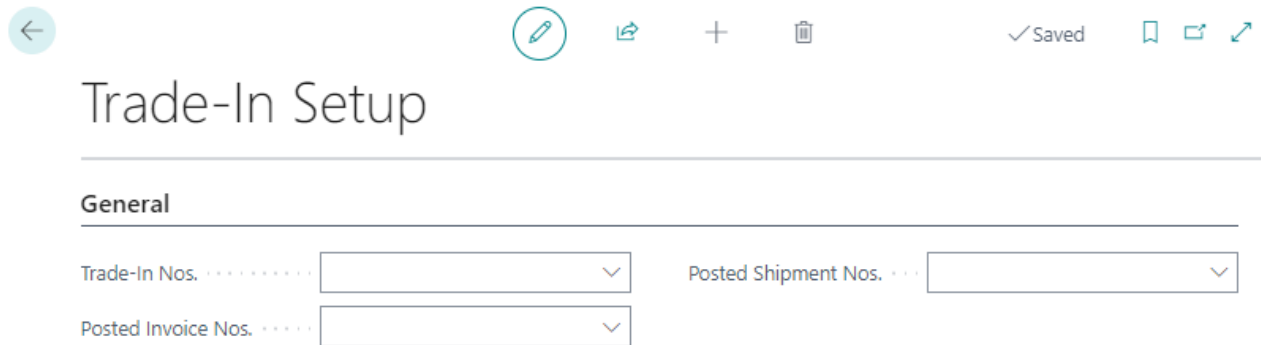


Figure: Setup Trade-In

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.



Figure: Create Number Series

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 [Create number series](#).
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.



✓ Saved



Trade-In Setup

General

Trade-In Nos.

Posted Invoice Nos.

Posted Shipment Nos. ...

Figure: Setup Trade-In

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.

Select - No. Series | 🔍 v + New Edit List ...

Code ↑	Description	Starting No.	Ending No.
→			

Figure: Create Number Series

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 [Create number series](#).
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.

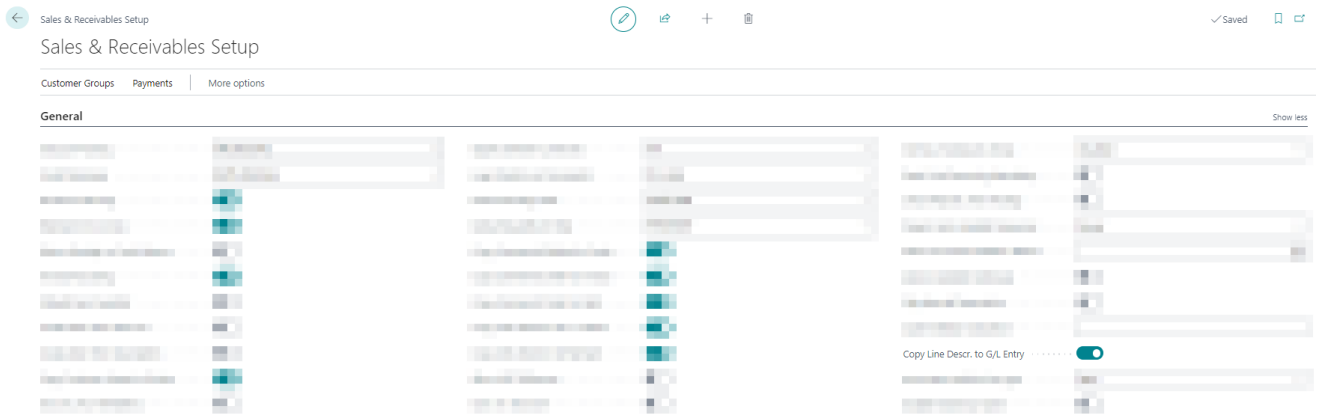


Figure: Copy line description for G/L entry

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.

Posted Sales Document Lines - 20000 · Trey Research

Options

Show Reversible Lines... Return Original Quant...

Document Type Filter: Posted Invoices

Posted Shipments

Posted Invoices

Posted Return Receipts

Posted Cr. Memos

Lines

Document No.	Posting Date	Type	No.	Item Reference No.	Description	Unit of Measure Code
→ 103001	18.01.2022	Item				STÜCK
103006	23.01.2022	Item				STÜCK
-	23.01.2022	Item				STÜCK
-	23.01.2022	Item				STÜCK
103011	28.01.2022	Item				STÜCK
103015	17.02.2022	Item				STÜCK
103019	21.02.2022	Item				STÜCK
-	21.02.2022	Item				STÜCK
-	21.02.2022	Item				STÜCK
103023	25.02.2022	Item				STÜCK

OK Cancel

Figure: Retrieve posted line items to be reversed

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.

The screenshot shows the 'Trade-In' interface for document TI-00000124. The main title is 'TI-00000124 · Trey Research'. Below the title is a navigation bar with options: Home, Prepare, Print/Send, Request Approval, Return Order, and More options. The 'General' section is expanded. The 'Lines' tab is active, showing a table with columns: Type, No., VAT Prod. Posting Group, and Description. The table contains three rows: an 'Item' row with No. 1006 and VAT Prod. Posting Group MWST.19, and two 'Comment' rows. The first comment row contains 'Invoice No. 103001:' and the second comment row contains 'Ref.-No. 103001 - Shipment No. 102001'.

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

Figure: Transferred Lines in the Trade-In

You have created a trade-in.

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