BEYOND
CARTS

User Guide

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

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Preface

This documentation contains information on how to install and operate **Beyond Carts** 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 Carts**.

Read this documentation in full to set up **Beyond Carts** 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 Carts** and keep the documentation in a place that is accessible to your employees.

<div style="text-align:center">

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</div>

Manufacturer

Beyond Carts is developed by:

BeyondIT GmbH
Schauenburgerstraße 116
24118 Kiel
Germany
info@beyondit.gmbh
+49 431 3630 3700

VISIT APPSOURCE

Version history

Version	Date	Author	Comment
1.0	20.11.2023	Jannic Weidel	Initial Version of the Documentation
1.1	20.05.2025	Jannic Weidel	Added new contents and reworked documentation
1.2	12.06.2025	Jannic Weidel	Added Preface chapter
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 Carts is an extension for Microsoft Dynamics 365 Business Central.

Beyond Carts adds carts to your Business Central.
Users can create a cart within their Microsoft 365 Business Central account. This cart serves as a temporary shopping basket for selected items. The carts are intended for ordering goods, consumables and the like within the company for employees who have access to a BC application at their workplace but cannot or should not initiate external purchase processes. Item stock can be replenished without a specific order. Within the system, users can search for items to add to their cart. Users can search for items to add to their cart. Users have the ability to adjust quantities and remove items from the cart as needed to ensure accurate purchase order planning.

Multiple carts can be managed simultaneously, allowing users to separate items for different users or vendors. Integration with purchase orders: When you're ready, you can seamlessly convert cart contents into purchase orders to replenish item stock. This step ensures that the correct items and quantities are ordered for the warehouse. During the import function, all carts that could be relevant for a purchase order (for stock) are displayed. It is possible to filter by supplier in advance. It is also possible to mark items as "Recurring" so that they are not removed from the cart after an import. These items can be used multiple times in further orders.

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

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

Assign User Permissions

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

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

To assign the permission set for **BEYOND Carts** 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.
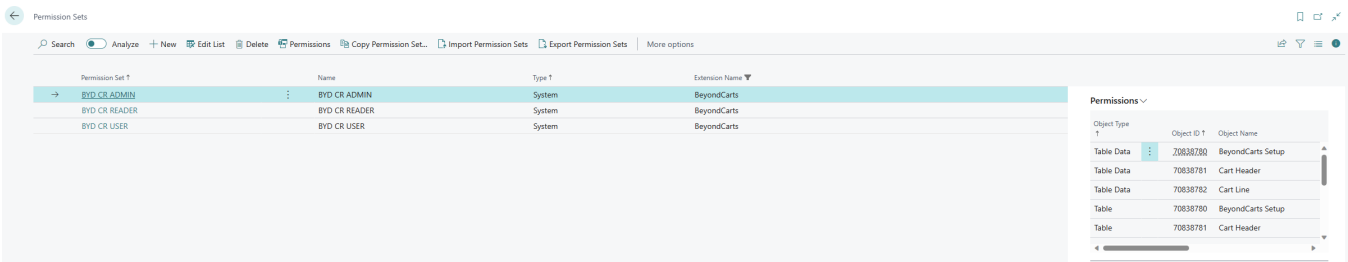
6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondCarts** as filter criteria.
8. The list is filtered to the permission sets of **BeyondCarts**.
9. Select the check box on the right side of the page for the user or users to whom you want to assign the permission set.

You have assigned a permission set for **BEYOND Carts** 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.

Setup Beyond Carts

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

> **ⓘ NOTE**
>
> **Permissions Required**
>
> Setting up **Beyond Carts** requires special permissions. Your user account must be assigned the permission set **BYD CR Admin** or, if applicable, **SUPER** in order to view the setup page for **Beyond Carts** and make changes. For more information about the available permission sets and how to assign them to user accounts, see the section Assign User Permissions.

The setup of **Beyond Carts** is based on your individual requirements and processes. The setup page allows several configurations, the options for which are described below.

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

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

4. Open the dropdown list for the **Default Cart No.** field and click **New**. This cart is always used if no separate cart has been created for a user. We recommend that you do not activate the **Recurring** field for this cart.
5. The **Select - Cart** window is displayed.

Select - Cart ...

General

No. .... [   ]
Description .... [   ]
User Id .... [▾]

Cart Behavior .... [Add Directly   ▾]
Recurring .... (●)

Lines | ⊞ New Line ⊠ Delete Line ⊡ Create Item

Type	Item No.	Description	Vendor No.	Vendor Name	Vendor It
→ Item					

Protocol ›

[OK] [Cancel]

6. Complete the information for the cart and return to the **Beyond Carts Setup** page.
7. If you want to allow multiple carts per user, activate the **Multiple Carts Per User** slider.
8. In the dropdown menu for the **Default Cart Behavior** field, choose between the **Add Directly** or **User Input** options. With the **Add Directly** option, the item lines are added to the cart directly from the document with the corresponding quantity. With the **User Input** option, you are prompted to enter the item quantity when transferring the item lines to the cart.
9. Activate the **Get Carts by Vendor** slider if you want to filter by vendor first when retrieving cart lines. When you create an order and retrieve cart lines, not all cart lines in the system are displayed, but only the cart lines that are stored in the system for the selected vendor.
10. Under the **No. Series** section, you must set up a new number series for the carts in the **Cart Nos.** field.
11. Open the dropdown menu and select the **New** option from the window.
12. Create a new number series and assign it using the field.

You have set up **Beyond Carts**.

For more information on how to use **Beyond Carts**, please refer to the chapter Create Cart.

Create Cart

This chapter describes how to create a cart and add items or other goods to the cart. For more information on how to create an order from one or more carts, please refer to the chapter Create Purchase Documents with Carts.

To create a cart, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Carts** and click on the corresponding search result.
3. The **Carts** page is displayed.
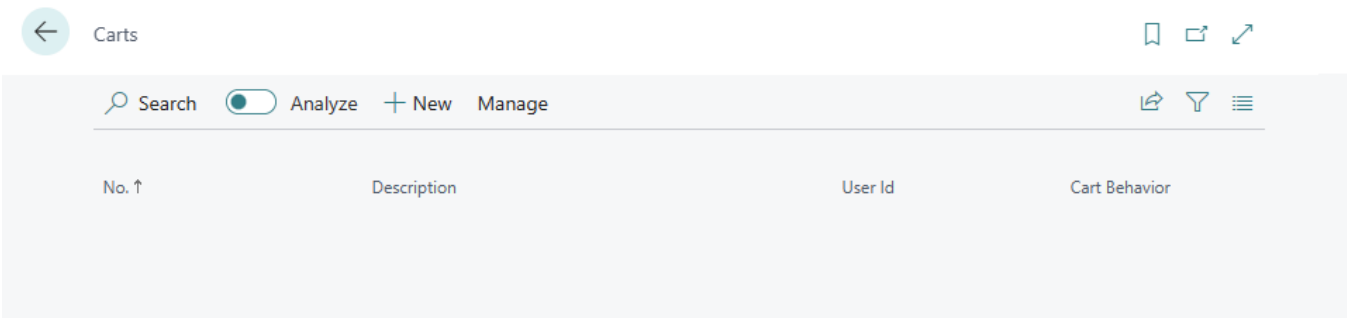
4. To create a new cart, click on the **New** option in the menu bar.
5. A new cart card is displayed.

6. Click in the **Description** field and enter a description for the cart. Please note that the information in the **No.** field is automatically assigned by the system if you have stored the number series for carts on the **BeyondCarts Setup** page. For more information on the setup, please refer to the chapter Setup Beyond Carts.
7. Open the drop-down list for the **User ID** field and select the user to whom this cart should be assigned.
8. Use the value in the **Default Cart Behavior** field to determine how the items are added to the cart. The following values are possible:
    - With the **Add Directly** option, the item lines are added to the cart directly from the document with the corresponding quantity.
    - With the **User Input** option, you will be prompted to enter the item quantity and other information when transferring the item lines to the cart.

9. You can use the **Recurring** slider to define whether the cart is displayed on a recurring basis, i.e. the lines from the cart are not deleted if the lines have been transferred to a purchase order and are displayed again when a new purchase order is triggered. You can also make this setting for individual item lines by activating the **Recurring** checkbox for existing item lines.
10. The item lines contained in the cart are displayed under the **Lines** tab. As the cart has been newly created, no lines are displayed in this area.
11. The **Protocol** tab displays information about the user and the time stamp from which this data record was retrieved for a purchase order.

You have created a cart. In the Add Items To Cart chapter, you will find further information on how to fill the cart with item lines.

Add Items to Cart

This chapter describes how to add an item to a cart.

Add Item from Sales Order

This chapter describes how you can add an item from a sales order to a cart.

> **ⓘ NOTE**
>
> **Permission Set required**
>
> To be able to carry out the following procedure, your user account must be assigned at least the **BYD CR User** (or **BYD CR Admin**) premission set. If none of these permission sets have been assigned to your user account, you will not be able to carry out the following procedure in your system. Please contact your system administrator or, if necessary, your Business Central consultant at your partner. For more information on the premission sets and how to assign the premission sets to user accounts, see Assign User Permissions.

To add an item from a sales order to a cart, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Sales Orders** and click on the corresponding search result.
3. The **Sales Orders** list is displayed.
4. Open the card of an existing sales order.
5. To add an item to the cart, click on the corresponding item line in the **Lines** area and select **Manage** > **Add to Cart** from the menu.

6. If you have set the value **Add Directly** in the **Default Cart Behavior** field when setting up the cart, you will receive a message that the item has been added to a cart. If you have set the value **User Input** in the **Default Cart Behavior** field when setting up the cart, you must define the cart, the quantity of the item and other information.

Add to Cart

Item No.	1006	Quantity	5,00
Description	Bosal Exhaust System	Location Code	WEST
Vendor No.	10000	Bin Code	
Vendor Item No.	123456	Recurring	

OK   Cancel

7. Under the **Vendor no.** field, enter the vendor via which this item can be obtained.
8. Enter the required quantity to be purchased in the **Quantity** field.
9. Activate the **Recurring** slider if the item line should not be deleted from the cart when the item is purchased. With this setting, you define that the item line you have defined is displayed with every new purchase document.
10. Click **OK** to add the item line to a cart.

You have added an item to a cart. For more information on how to create a purchase order from one or more carts, please refer to the chapter Create Purchase Documents with Carts.

Add Item from Sales Quote

This chapter describes how you can add an item from a sales quote to a cart.

> **ⓘ NOTE**
>
> **Permission Set required**
>
> To be able to carry out the following procedure, your user account must be assigned at least the **BYD CR User** (or **BYD CR Admin**) premission set. If none of these permission sets have been assigned to your user account, you will not be able to carry out the following procedure in your system. Please contact your system administrator or, if necessary, your Business Central consultant at your partner. For more information on the premission sets and how to assign the premission sets to user accounts, see Assign User Permissions.

To add an item from a sales quote to a cart, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Sales Quotes** and click on the corresponding search result.
3. The **Sales Quotes** list is displayed.
4. Open the card of an existing sales quote.
5. To add an item to the cart, click on the corresponding item line in the **Lines** area and select **Manage** > **Add to Cart** from the menu.

6. If you have set the value **Add Directly** in the **Default Cart Behavior** field when setting up the cart, you will receive a message that the item has been added to a cart. If you have set the value **User Input** in the **Default Cart Behavior** field when setting up the cart, you must define the cart, the quantity of the item and other information.

7. Under the **Vendor No.** field, enter the vendor via which this item can be obtained.
8. Enter the required quantity to be purchased in the **Quantity** field.
9. Activate the **Recurring** slider if the item line should not be deleted from the cart when the item is purchased. With this setting, you define that the item line you have defined is displayed with every new purchase document.
10. Click **OK** to add the item line to a cart.

You have added an item to a cart. For more information on how to create an order from one or more carts, please refer to the chapter Create Purchase Documents with Carts.

Add Item from Item Card

This chapter describes how you can add an item from the item card to a cart.

To add an item from the item card to a cart, 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 of an item.
5. To add an item to the cart, click on **Actions** > **Add to Cart** in the menu bar.

6. If you have set the value **Add Directly** in the **Default Cart Behavior** field when setting up the cart, you will receive a message that the item has been added to a cart. If you have set the value **User Input** in the **Default Cart Behavior** field when setting up the cart, you must define the cart, the quantity of the item and other information.

7. Under the **Vendor No.** field, enter the vendor via which this item can be obtained.
8. Enter the required quantity to be purchased in the **Quantity** field.
9. Activate the **Recurring** slider if the item line should not be deleted from the cart when the item is purchased. With this setting, you define that the item line you have defined is displayed with every new purchase document.
10. Click **OK** to add the item line to a cart.

You have added an item to a cart. For more information on how to create an order from one or more carts, please refer to the chapter Create Purchase Documents with Carts.

Create Purchase Documents with Carts

This chapter describes how you can create purchase documents with the carts in your company.

The contents of this chapter are divided into the following sections:

Transfer Item Lines from Carts for a specific Vendor
Create Multiple Purchase Quotes with Carts

Transfer Item Lines from Carts for a specific Vendor

This chapter describes how to transfer item lines from carts to a purchase document for a specific vendor.

> ⚠ **WARNING**
>
> **Delete item lines from the document**
>
> Please note that when deleting one or more item lines in the document, the item lines are **NOT** written back to the cart. The link to the document in the item lines of the cart remains.

> ℹ **NOTE**
>
> **Item lines in the cart**
>
> After the item lines have been transferred to a purchase document, they are highlighted in color. The color highlighting remains until the items have been booked via a purchase order. After posting, the item lines are deleted from the cart.

> ℹ **NOTE**
>
> **User permissions required**
>
> To be able to carry out the following steps, your user account must be assigned at least the **BYD CR User** (or **BYD CR Admin**) permission set. If none of these permission sets have been assigned to your user account, you will not be able to carry out the following procedure in your system. Please contact your system administrator or, if necessary, your Business Central consultant at your partner. For more information on the permission sets and how to assign the permission sets to user accounts, see Assign User Permissions.

> ℹ **NOTE**
>
> **Procedure for purchase quotes and purchase orders**
>
> The procedure described here can also be used in the same way for purchase orders.

> ℹ **TIP**
>
> **Less Documents**
>
> The procedure in this section allows you to transfer item quantities from different carts to a single document. With the collected item quantities, you put your company in a better negotiating position with your vendor and may be able to negotiate better conditions (such as lower purchase prices). In addition, you ensure fewer documents in goods receipt and optimize logistics through larger item deliveries.

> ℹ **TIP**
>
> **Multiple selection possible**
>
> You can select several item lines in one step. To do this, hold down the SHIFT key to select a range of item lines. Hold down the CTRL key to select the item lines individually. Click again to deselect the item lines.

To transfer item lines from carts to a purchase document for a specific vendor, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Purchase Quotes** and click on the corresponding search result.
3. The **Purchase Quotes** list is displayed.
4. To create a new purchase quote, click on the **New** option in the **Purchase Quotes** list in the menu bar.
5. A new card is displayed for a **Purchase Quotes**.
6. Complete the information in the document header.
7. To transfer item lines from all carts for the vendor, click on the **Get Cart Lines** option in the menu bar.
8. The **Cart Lines** window is displayed.

9. The items in the lines originate from the carts in your system. All items in these lines are sourced from the vendor specified in the purchase document.
10. Select the item line(s) that you want to transfer to the purchase document.
11. To transfer the selected item lines to the purchase document, click on **OK** in the **Cart Lines** window.

12. The screenshot above shows how this function transfers the item lines from two carts to a purchase quote. After the transfer to a purchase document, the transferred lines in the carts are highlighted in color.

You have transferred one or more item lines to a purchase document.

Create Multiple Purchase Quotes with Carts

This chapter describes how you can create several purchase quotes at the same time by transferring item lines from carts.

⚠ **WARNING**

Delete item lines from the document

Please note that when deleting one or more item lines in the document, the item lines are **NOT** written back to the cart. The link to the document in the item lines of the cart remains.

ℹ **NOTE**

Item lines in the cart

After the item lines have been transferred to a purchase document, they are highlighted in color. The color highlighting remains until the items have been posted via a purchase order. After posting, the item lines are deleted from the cart.

ℹ **NOTE**

User permissions required

To be able to carry out the following procedure, your user account must be assigned at least the **BYD CR User** (or **BYD CR Admin**) permission set. If none of these permission sets have been assigned to your user account, you will not be able to carry out the following procedure in your system. Please contact your system administrator or, if necessary, your Business Central consultant at your partner. For more information on the permission sets and how to assign the permission sets to user accounts, see Assign User Permissions.

ℹ **TIP**

Less Documents

The procedure in this section allows you to transfer item quantities from different carts to a single document. With the collected item quantities, you put your company in a better negotiating position with your vendor and may be able to negotiate better conditions (such as lower purchase prices). In addition, you ensure fewer documents in goods receipt and optimize logistics through larger item deliveries.

To transfer item lines from carts and create several purchase quotes at the same time, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Purchase Quotes** and click on the corresponding search result.
3. The **Purchase Quotes** list is displayed.
4. In the menu bar of the **Purchase Quotes** list, click on the **Create from Cart** option.
5. The **Cart Lines** window is displayed.

6. The items in the lines originate from the carts in your system. All item lines that are contained in carts are displayed.
7. Select the item line(s) that you want to transfer to purchase documents.
8. Confirm the selection with **OK**.
9. A dialog box is displayed.

10. To create multiple quotes, confirm the dialog box with **Yes**.
11. After the transfer to the purchase quotes, the transferred lines are highlighted in color in the carts.

You have transferred one or more item line(s) to purchase quotes.