BEYOND

BRIDGE APP

DATAIMPORTERCATALOG

User Guide

BEYONDIT GmbH

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Preface

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

Read this documentation in full to set up **Beyond DataImporterCatalogBridge** 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 DataImporterCatalogBridge** 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	03.04.2023	Jannic Weidel	Initial version of the documentation
1.1	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:

> **❶ 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.

> **❶ 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 DataImporterCatalogBridge is an extension for Microsoft Dynamics 365 Business Central.

The **Beyond DataImporterCatalogBridge** application builds a bridge between **Beyond DataImporter** and **Beyond Catalog**. This bridge application allows you to import items from an Excel file and creates so-called Beyond Catalog Items for the imported lines. The Beyond Catalog Items allow you to use a cross-client nonstock item master in your environment. Updates to the catalog item master such as price reductions, price increases or additional product ranges are made for all clients in the environment.

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

The examples described in this documentation represent only a part of the possibilities that the **Beyond DataImporterCatalogBridge** solution offers you. If you have a specific case that you would like to map via the solution, please feel free to contact us.

> **ℹ NOTE**
>
> **Dependencies on or to other apps**
>
> Additional, basic applications are required to use **Beyond DataImporterCatalogBridge**. The following applications are required to use **Beyond DataImporterCatalogBridge**:
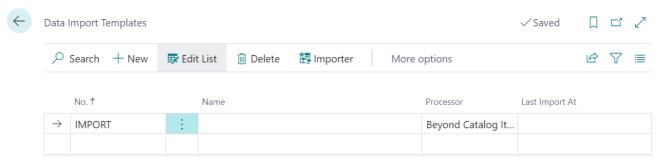
- Beyond Catalog: Enables the use of cross-client nonstock items.
- Beyond DataImporter: Enables the import of large amounts of data via a processor.

Import Beyond Catalog Items

This chapter describes how to import an item master as Beyond Catalog Items from a file (for example, a price list). Note that this data must be available as an Excel file. Each row in the Excel table must represent a single item, while the properties to be imported and stored as columns.
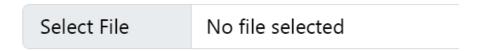
To import items from this list as cross-client Beyond Catalog Items, follow these steps:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Data Import Templates** and click on the corresponding search result.
3. The **Data Import Templates** list is displayed. On this page you can find all configured data import templates.
4. To create a new data import template, click **New** in the menu bar.

5. Enter a number for the data import template under the **No.** column.
6. Enter a name for the data import template under the **Name** column.
7. Specify a processor under the **Processor** column. A so-called processor processes the uploaded file (this is done later in this description) and imports the data into your Business Central. In this description we have used the **Beyond Catalog Item** processor because we want to perform an import for Beyond Catalog Items (cross-client nonstock items). If you need a processor that is not included in the scope of the application by default, we can create it for you individually. To do so, contact us at info@beyondit.gmbh.
8. Click **Importer** in the menu bar. A new window will open.

9. Click **Select File** and select the file in which the data you want to upload is stored.

Importer - Catalog Import Buffer

Select File		Save Template

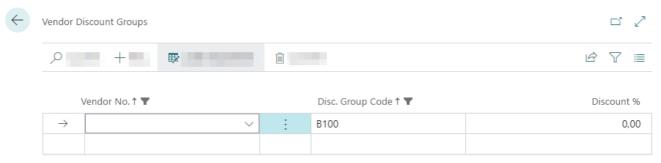| Target	Source	Format	-100	-10	-1	**000**	1	10	100
Description	▼								
Description 2	▼								
Manufacturer Code	▼								
Manufacturer Item No.	▼								
Group Code	▼								
Bar Code	▼								
Valid From	▼	TT.mm.jjjj 📅							
Vendor Code	▼								
Vendor Item No.	▼								
Unit of Measure Code	▼								
Quantity per Unit of Measure	▼								
Unit Cost	▼								
Unit Price	▼								
Without Surcharge	▼	☐							
Vendor Discount Group Code	▼								
Customer Price Group Code	▼								
Gross Weight	▼								
Net Weight	▼								
Packaging Unit	▼								
Catalog Item Template Code	▼								
Item Discount Group Code	▼								

25927 | 1598 ms

Import Data

10. The display of the window is updated after the file is uploaded. Subsequently, you need to map the data from the uploaded file to the fields in Business Central so that the data can be imported. In the following example, we explain how to do this.

11. The fields highlighted in color are mandatory fields, i.e. you must specify a value for these lines.

12. You can check the assignments via the data set preview. The read out data is displayed in the third column (right column). Using the number bar above this column, you can jump between the rows in the uploaded file and compare the data.

13. To save your settings and the mappings, click **Save Template**.

14. To start the import, click **Import data**.
    If values from the records to be imported are not already stored in the system (for example, a vendor discount group), you must create a relation. The following window will be displayed:

Table Caption	Field Caption	Field Value ↑	Relation Table Caption	Relation Field Caption	Relation is Valid
Beyond Catalog Item	Manufacturer Code	BEYONDIT	Manufacturer	Code	☑
Beyond Catalog Item	Vendor No.	10000	Vendor	No.	☑
Beyond Catalog Item	Unit of Measure	PIECE	Unit of Measure	Code	☑
Beyond Catalog Item	Item Template Code	ITEM	Item Template	Code	☐
→ Beyond Catalog Item	Discount Group Code	Y100	Vendor Discount Group	Vendor No.	☐

OK   Cancel

15. Click on the row where the check box under the **Relation is valid** column is not selected.

16. Click on the ellipse of the line and select **Create Related Value** from the context menu.

17. Create the relation for the record. In our example, the **Vendor Discount Groups** window is displayed.

Vendor No. ↑ ▼			Disc. Group Code ↑ ▼	Discount %
→		⌄	⋮	B100	0,00

18. In the **Vendor No.** column, specify the vendor for which you want to store the vendor discount group.
19. In the **Discount %** column, enter the percentage discount for the items subject to this discount group.
20. After specifying the percentage discount, you will be asked if you want to update the related records. Click **Yes**.
21. Close the window. You will be returned to the **Field Values** page.
22. Click **OK** to start the import.

ⓘ Import Completed!

Catalog Items created: 25927
Updated Catalog Items: 0

OK

Your settings and assignments are saved in the file import template. The number of rows (records) to be imported is displayed at the bottom left (in our example it is 25927 records). A process bar shows you the progress. All items imported in this way are created as Beyond catalog items and can be viewed via the page of the same name.