BEYOND

DocumentLineTransfer

User Guide

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Table of Contents

Preface

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

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

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Manufacturer

Beyond DocumentLineTransfer is developed by:

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VISIT
APPSOURCE

Version history

Version	Date	Author	Comment
1.0	21.08.2024	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:

> **ⓘ 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 DocumentLineTransfer is an extension for Microsoft Dynamics 365 Business Central.

The **Beyond DocumentLineTransfer** application allows you to import or export document lines as CSV or TXT files. This functionality is supported for the following documents:

Purchase	Sales	Service
Purchase Order	Sales Order	Service Item Worksheet

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

The examples described in this documentation represent only a part of the possibilities that the **Beyond DocumentLineTransfer** 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 from or to other apps**
> Additional, basic applications are required to use **Beyond DocumentLineTransfer**. The following applications are required to use **Beyond DocumentLineTransfer**:

- Beyond License: Management of trial and full licenses for apps from BeyondIT.

License Management

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

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

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:

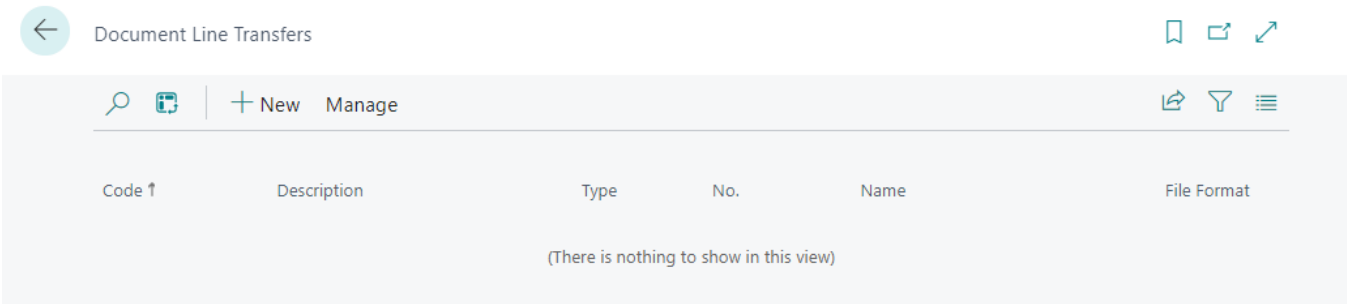| Column	Description
Company Name	This column indicates the name of the company.
Application Name	This column indicates the name of the application. If you use several BeyondIT products, a separate line is displayed for each product in the overview,
Status	This is the status of the product license. Several values are possible: **Valid**: The product license is valid and the application can be used without restrictions. **Expired**: The product license has expired. The application can no longer be used. **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. **Exceeded**: The product license has expired. The application can no longer be used.
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.

Setup Beyond DocumentLineTransfer

This chapter describes how to set up **Beyond DocumentLineTransfer**.
Beyond DocumentLineTransfer allows you to both import and export document lines. In addition, there are various import and export formats that you must define in advance.

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

1. Open the search field (ALT+Q) and search for the page **Document Line Transfers**.
2. The **Document Line Transfers** page is displayed.

3. Click on the **New** option in the menu bar to create a new document line transfer order.
4. A new card is displayed.

5. Enter a unique code for the document line transfer in the **Code** field.
6. Add a more detailed description for the document line transfer in the **Description** field.
7. In the **Type** field, define the business area for which the import or export of the document lines is to be used.
8. Depending on the setting in the **Type** field, you can use the **No.** field to specify a customer or vendor number for which the document line transfer order created can be used. The name of the customer or vendor is automatically added to the **Name** field after the number has been entered.
9. You can specify the format of the input or output file in the **File Format** field. You can import or export the document lines either as a TXT file or as a CSV file.
10. In the **Field Separator** field, you can define the separator for specifying values. By default, the semicolon is used on a new document line transfer order card.
11. You can use the **Has Headline** field to specify that the input or output file contains a line for labeling the field values to be imported or exported.
12. Define the file information under the **Columns** tab. Specify how many columns are contained in the file to be exported or

imported and which information in the corresponding column is transferred to or from Business Central.

You have created a document line transfer order. This can be used in the corresponding documents for importing or exporting lines.

Example

Below you will find an example of a possible configuration. The order has been configured so that a CSV file is used as the file format. This file is only used for purchasing documents from the vendor **Fabrikam**. The file information is separated by a semicolon and no headline is used in the file. The information **Line No.**, **Item No.**, **Description** and **Quantity** can be imported or exported.

Assign User Permissions

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

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

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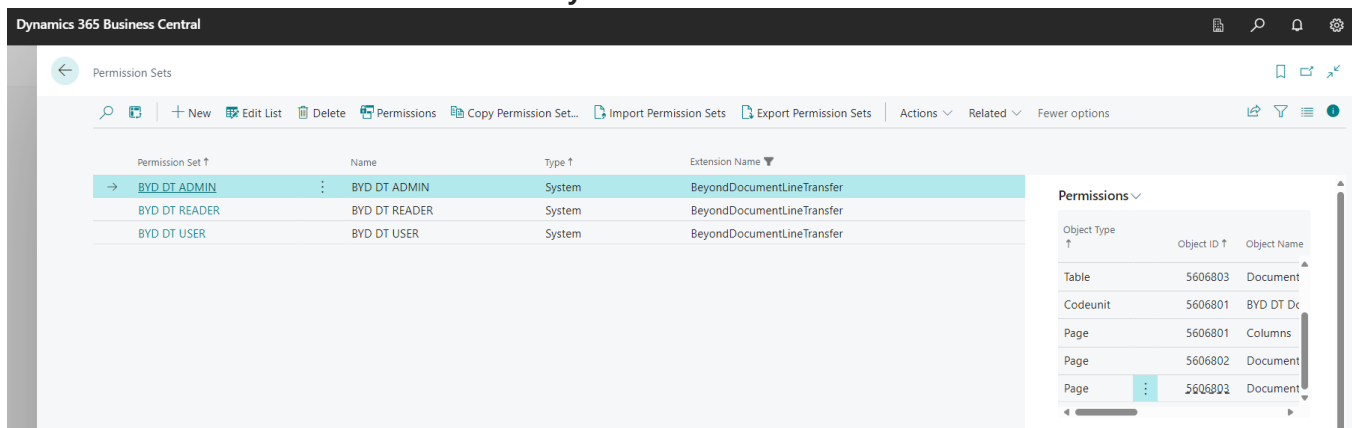
6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondDocumentLineTransfer** as filter criteria.
8. The list is filtered to the permission sets of **BeyondDocumentLineTransfer**.
9. Select the check box on the right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

Export Document Line

This chapter describes how to export a document line from Business Central via the **Beyond DocumentLineTransfer** app. Please note that you must configure a document line transfer order before exporting the document line; you can find more information on this in the chapter Setup Beyond DocumentLineTransfer.

To export a document line, proceed as follows:

1. Open the document from which you want to export one or more document lines.
2. Click on the **Document Line Transfer** option in the menu bar and select **Export Document Line Transfer**.

The file is downloaded. The chapter Import Document Line describes how you can import document lines.

Import Document Line

This chapter describes how to import a document line from Business Central via the **Beyond DocumentLineTransfer** app. Please note that you must configure a document line transfer order before exporting the document line; you can find more information on this in the chapter Setup Beyond DocumentLineTransfer.

To import a document line, proceed as follows:

1. Open the document from which you want to import one or more document lines.
2. Click on the **Document Line Transfer** option in the menu bar and select **Import Document Line Transfer**.

3. Specify the file to be imported in the dialog and upload it.

You have added one or more document lines to the document. The Export Document Line chapter describes how you can export document lines.
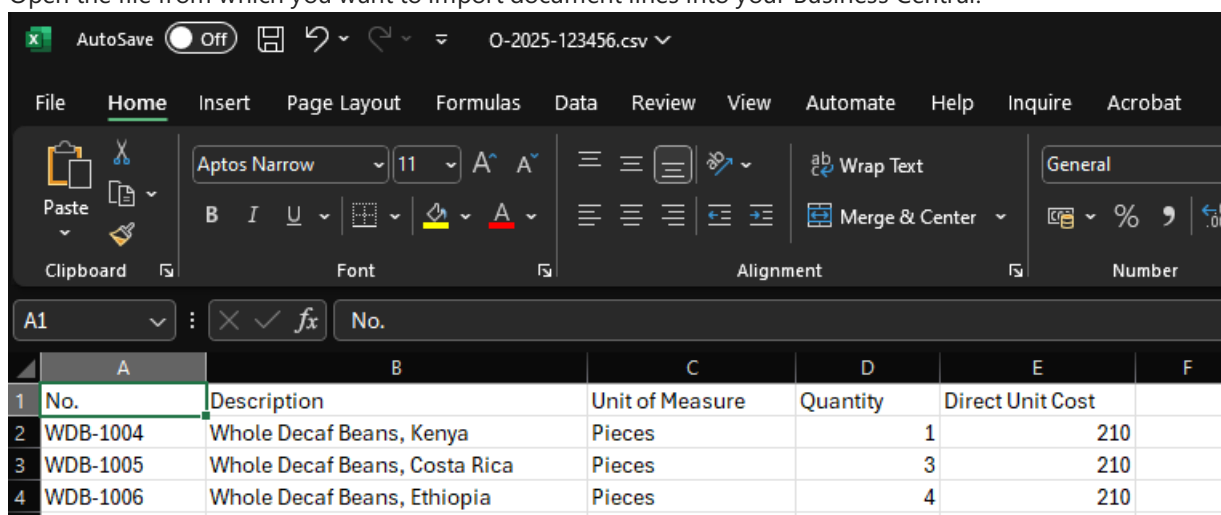
Import File Export From Another System

This chapter describes how to import a file export (of document lines) from another system into your Business Central. Please note that only the following file formats are supported for importing document lines:

- CSV
- TXT

To import document lines from a file in another system into your Business Central, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Document Line Transfers**.
2. The **Document Line Transfers** page is displayed.
3. Click on the **New** option in the menu bar to create a new document line transfer for importing data from a foreign system file.
4. Enter a code for the document line transfer in the **Code** field.
5. Enter a description for the document line transfer in the **Description** field.
6. Under **Type**, select the business area for which you would like to use the document line transfer.
7. Open the file from which you want to import document lines into your Business Central.

8. Under **File Format**, enter the format of the file from which you want to import document lines into your Business Central. In our example here, this is a CSV file.
9. If your import file has a header line, as in our example, activate the **Has Headline** checkbox.
10. In the **Columns** tab, enter the information in the order in which it is contained in the file. In our example, we have the information **No.** as the first column in the CSV file.
11. To include this information in the document line transfer, enter the value **1** in the **Column No.** column on the **Columns** tab. This defines the first column in the document line transfer. To be able to import the item number, you must enter the corresponding value in the **Field No.** column. In our example, this is the value **6** (item number). The information in the **Field Caption** and **Column Name** columns is added automatically.
12. Proceed in the same way with the other information from the file you wish to import.

You have created a document line transfer that you can use to import information into your Business Central. Please note that only the information that you have defined in the document line transfer will be imported.