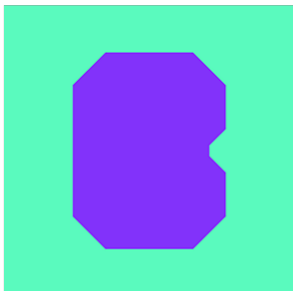




BEYOND

Data Importer



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Preface

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

Read this documentation in full to set up **Beyond Data Importer** 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 Data Importer** 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	16.01.2023	Jannic Weidel	Initial version of the documentation
1.1	16.05.2023	Jannic Weidel	Added Chapter for assigning permission sets
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 Data Importer is an extension for Microsoft Dynamics 365 Business Central.

Beyond Data Importer allows you to import and process large amounts of data.

Load catalogs and price lists of your business partners into your system and import the contained items as non-stock items.

You only need to create an import template once for each file. All settings and assignments to the import template are saved for the next import.

This way, you can update the purchase prices of nonstock items with just a few clicks instead of tediously maintaining them manually.

The latest version of this documentation can be found at the following link: [Beyond Data Importer Documentation](#).

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

NOTE

Dependencies on or to other apps

Additional, basic applications are required to use **Beyond Data Importer**. The following applications are required to use **Beyond Data Importer**:

- [Beyond License](#): Management of trial and full licenses for apps of BeyondIT.

License Management

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

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

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Beyond License Management

Tenant ID

Tenant Domain Name

Licenses

⌕ Sync License

Company Name T

Application Name

Status

Start Date

Expiry Date

Trial

Licensed Metric

Current Metric

→

⌵

Valid

23.08.2024 08:50

22.09.2030 08:50

☐

1

0

BeyondServiceRequestion

Valid

02.04.2024 09:13

02.05.2030 09:13

☐

1

0

BeyondCalculation

Valid

14.06.2024 00:33

13.06.2030 00:33

☐

1

0

BeyondReportReview

Valid

15.07.2024 21:26

14.06.2030 21:26

☐

1

0

BeyondService

Valid

30.01.2024 07:41

28.02.2030 07:41

☐

7

0

BeyondCues

Valid

29.11.2023 19:15

28.02.2030 07:41

☐

7

0

BeyondInventoryDetails

Valid

29.01.2024 23:28

28.02.2030 07:41

☐

7

0

BeyondDataImporter

Valid

17.06.2024 22:55

17.07.2030 22:55

☐

1

0

BeyondCloudConnector

Valid

04.07.2024 06:42

03.08.2030 06:42

☐

1

0

BeyondAttributionCore

Valid

14.06.2024 07:51

14.07.2030 07:51

☐

1

0

BeyondReports

Valid

05.07.2024 06:39

04.06.2030 06:39

☐

1

0

BeyondDocumentLineTransfer

Valid

19.06.2024 20:40

31.12.2099 00:00

☐

4

0

- 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.

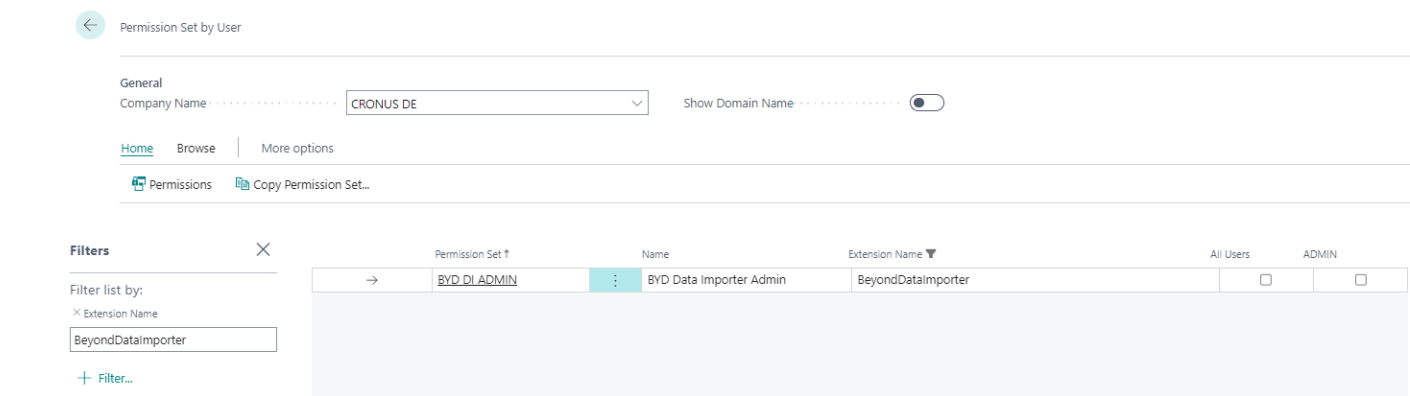
Assign User Permissions

The following description shows how to assign user permissions for the **Beyond Data Importer** extension. The permission sets provided are:

Permission Set	Description
BYD DA ADMIN	This permission set enables the use of the BeyondDataImporter extension.

To assign the permission set for **Beyond Data Importer** 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 **BeyondDataImporter** as filter criteria.
8. The list is filtered to the permission sets of **BeyondDataImporter**.
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 Data Importer** 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.

Import Non-Stock Items

This chapter describes how to import non-stock 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 should be assigned to an item, while the properties to be imported and deposited as columns.

To import non-stock items, proceed as follows:

- 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.

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Data Import Templates

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🔍 Search

➕ New

📋 Edit List

🗑 Delete

📂 Importer

More options

🔗

🔍

☰

No. ↑	Name	Processor	Last Import At
→		Nonstock Item	

- 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 **Nonstock Item** processor because we want to perform an import for 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. If you use Beyond Catalog in addition to Beyond DataImporter, a bridge application (**Beyond Data Importer x Catalog**) ensures that you can import items as cross-client Beyond Catalog Items (Nonstock Items). For more information on importing Beyond Catalog Items, see [Import Beyond Catalog Items](#).
- 8. Click **Importer** in the menu bar. A new window is displayed.

↗

✕

Importer - Nonstock Item

Select File

No file selected

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

Importer - Nonstock Item

Select File

Catalog-Sample-Import-01-01-2020.xlsx

Save Template

Target	Source	Format	-100	-10	-1	000	1	10	100
Manufacturer Code		BEYONDIT							
Vendor No.									
Vendor Item No.									
Description									
Unit of Measure									
Published Cost									
Negotiated Cost									
Unit Price									
Gross Weight									
Net Weight									
Last Date Modified		TT.mm.jjjj							
Bar Code									
Item Template Code									

Import File

- 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.
- The fields highlighted in color are mandatory fields, i.e. you must specify a value for these lines. Since in our example we are importing a product catalog from a single manufacturer, we can fix the value for the **Manufacturer Code** line under the **Format** column.

Importer - Nonstock Item

Select File

Catalog-Sample-Import-01-01-2020.xlsx

Save Template

Target	Source	Format	-100	-10	-1	000	1	10	100
Manufacturer Code		BEYONDIT							

- In the right column you will see a record from the uploaded file. In our example, the manufacturer code **BeyondIT** is imported for all data records.
- Under the **Format** column for the **Vendor No.** line, enter the number of the vendor in your system. Please note that this number must already be stored in the system, otherwise no records can be imported.
- For the **Vendor Item No.** row, click in the **Source** column. Assign the correct column from the selection list (the available selection options correspond to the columns in the uploaded Excel file).

Importer - Nonstock Item

Select File

Catalog-Sample-Import-01-01-2020.xlsx

Target	Source	Format
Manufacturer Code		BEYONDIT
Vendor No.		V-001234656
Vendor Item No.		
Description		
Unit of Measure		
Published Cost		
Negotiated Cost		

Item
Description
Unit of Measure
Catalog Price
Date of Pricing
Discount Group
Discount Percentage

15. Map the remaining fields as well (if possible).

Importer - Nonstock Item

Select File

Catalog-Sample-Import-01-01-2020.xlsx

Save Template

Target	Source	Format		
Manufacturer Code		BEYONDIT	X	BEYONDIT
Vendor No.		V-001234656	X	V-001234656
Vendor Item No.	Item			00000071016
Description	Description			BEYOND Sample Item
Unit of Measure	Unit of Measure			PIECE
Published Cost				
Negotiated Cost	Catalog Price			14,00
Unit Price	Recommended Sales Price			21,78
Gross Weight				
Net Weight	Weight			500
Last Date Modified	Date of Pricing	TT.mm.jjjj		01.01.2020
Bar Code	EAN/UPC			886661266555
Item Template Code		ITEM	X	ITEM

16 | 39 ms

Import File

- You can check the mappings via the data set preview. The read out data is displayed in the third column (right column). Via the number bar above this column you can jump between the rows in the uploaded file and compare the data.
- To import the data from the uploaded file, click **Import File**.
- To save your settings and the mapping, click **Save Template**.

Your settings and mappings 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 16 records). A process bar shows you the progress.