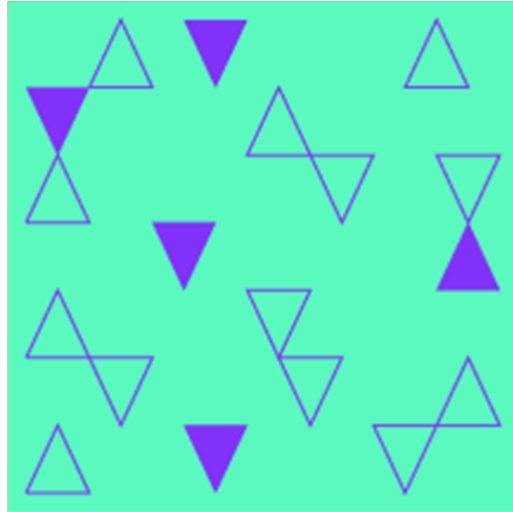
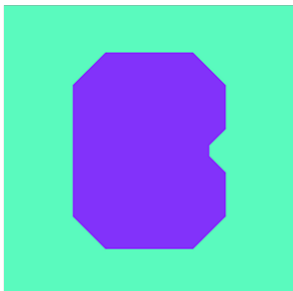




BEYOND

Document Line Transfer



BEYONDIT GmbH

Schauenburgerstr. 116
24118 Kiel
Deutschland

+49 431 3630 3700
info@beyondit.gmbh

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Preface

This documentation contains information on how to install and operate **Beyond Document Line Transfer** 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 Document Line Transfer**.

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

DOWNLOAD
PDF

Manufacturer

Beyond Document Line Transfer is developed by:

BeyondIT GmbH
Schauenburgerstraße 116
24118 Kiel
Germany
info@beyondit.gmbh
[+49 431 3630 3700](tel:+4943136303700)

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 Document Line Transfer is an extension for Microsoft Dynamics 365 Business Central.

The **Beyond Document Line Transfer** 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 Document Line Transfer Documentation](#).

The examples described in this documentation represent only a part of the possibilities that the **Beyond Document Line Transfer** 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 from or to other apps

Additional, basic applications are required to use **Beyond Document Line Transfer**. The following applications are required to use **Beyond Document Line Transfer**:

- [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 Document Line Transfer**.

To view the status of the product license for **Beyond Document Line Transfer**, 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.

Beyond License Management

Tenant ID									
Tenant Domain Name									
Licenses Sync License									
Company Name 1	Application Name	Status	Start Date	Expiry Date	Trial	Licensed Metric	Current Metric		
→	BeyondCalculation	Valid	23.08.2024 08:50	22.09.2030 08:50	☐	1	0		
	BeyondServiceRequisition	Valid	02.04.2024 09:13	02.05.2030 09:13	☐	1	0		
	BeyondPostCalculation	Valid	14.08.2024 00:33	13.09.2030 00:33	☐	1	0		
	BeyondReportPreview	Valid	15.07.2024 21:26	14.08.2030 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		
	BeyondAttributeCore	Valid	14.06.2024 07:51	14.07.2030 07:51	☐	1	0		
	BeyondReports	Valid	05.07.2024 06:39	04.08.2030 06:39	☐	1	0		
	BeyondDocumentLineTransfer	Valid	18.09.2024 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.

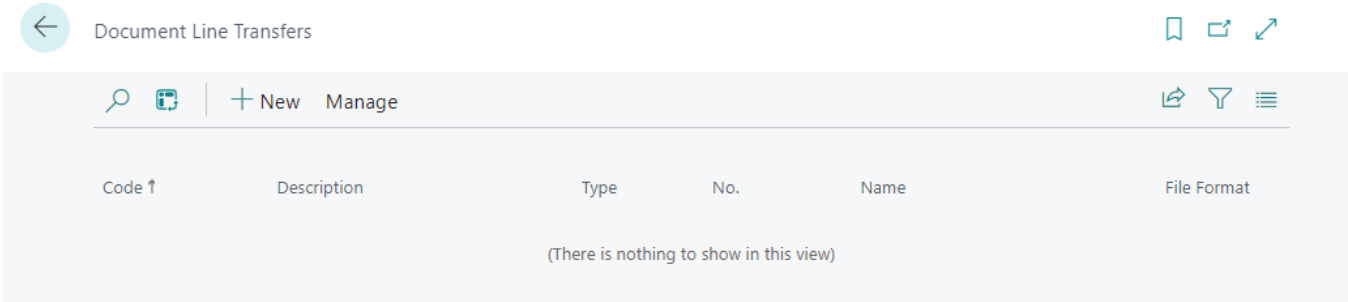
Setup Beyond Document Line Transfer

This chapter describes how to set up **Beyond Document Line Transfer**.

Beyond Document Line Transfer 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 Document Line Transfer**, 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.

Document Line Transfer

General

Code

*

Description

Type

Purchase

No.

Name

File Format

Text

Field Separator

;

Has Headline

Columns

New Line

Delete Line

Column No. ↑	Field No.	Field Caption	Column Name	Validation Sequence No.
→				

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.

✓ Saved

Document Line Transfer

General

Code

PURCHASE CSV

Name

Fabrikam, Inc.

Description

Comma separated Import and Exp

File Format

Text

Type

Purchase

Field Separator

;

No.

10000

Has Headline

Columns

New Line

Delete Line

	Column No. ↑		Field No.	Field Caption	Column Name	Validation Sequence No.
	1		4	Line No.	Line No.	
	2		6	No.	No.	
	3		11	Description	Description	
→	4	:	15	Quantity	Quantity	

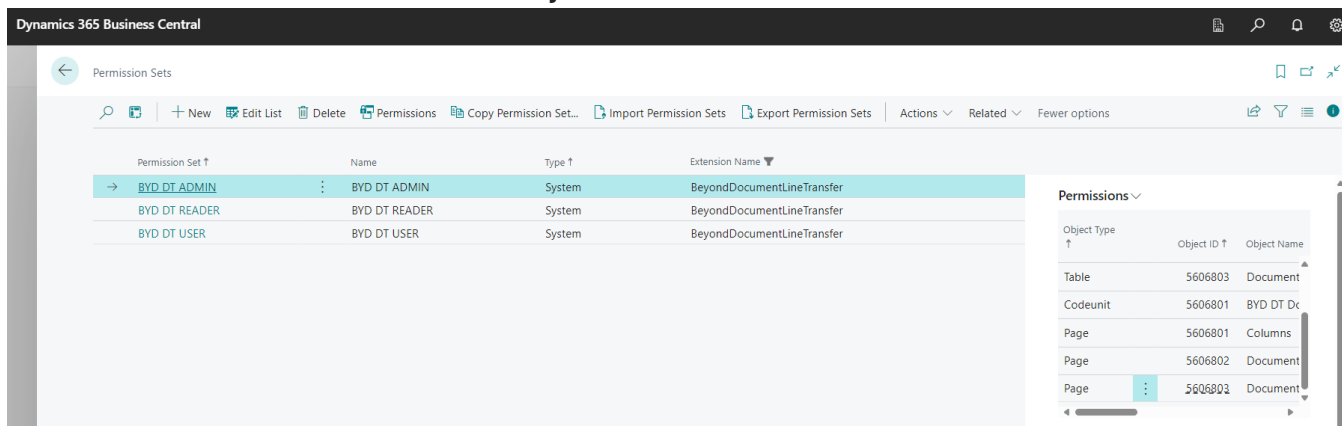
Assign User Permissions

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

Permission Set	Description
BYD DT Reader	This permission set enables the reading of data from the Beyond Document Line Transfer extension.
BYD DT User	This permission set enables the use of the Beyond Document Line Transfer 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 Document Line Transfer extension and the associated setup.

To assign the permission set for **Beyond Document Line Transfer** 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 **BeyondDocument Line Transfer** as filter criteria.
8. The list is filtered to the permission sets of **BeyondDocument Line Transfer**.
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 Document Line Transfer** 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 Document Line Transfer** 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 Document Line Transfer](#).

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**.

Purchase Order

106001 · Fabrikam, Inc.

Home

Prepare

Print/Send

Request Approval

Order

Document Line Transfer

Actions

Related

Automate

Fewer options

Import Document Line Transfer

Export Document Line Transfer

General

Show more

Vendor Name

Fabrikam, Inc.

...

Vendor Invoice No.

5755

Contact

Krystal York

...

Vendor Shipment No.

Document Date

08.04.2024

Status

Open

Lines

Manage

Line

Functions

Order

New Line

Delete Line

HTML Editor

Select items...

HTML Text exists

Page Break

Type

No.

Variant Code

Item Reference No.

Description

Location Code

Bin Code

Q

→

—

:

Item

1896-S

ATHENS Desk

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 Document Line Transfer** 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 Document Line Transfer](#).

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**.

Purchase Order

106001 · Fabrikam, Inc.

Home Prepare Print/Send Request Approval Order Document Line Transfer Actions ▾ Related ▾ Automate ▾ Fewer options

Import Document Line Transfer Export Document Line Transfer

General

Show more

Vendor Name	Fabrikam, Inc. ...	Vendor Invoice No.	5755
Contact	Krystal York ...	Vendor Shipment No.	
Document Date	08.04.2024 📅	Status	Open

Lines

Manage Line Functions Order

New Line Delete Line HTML Editor Select items...

HTML Text exists	Page Break	Type	No.	Variant Code	Item Reference No.	Description	Location Code	Bin Code	Q
→ -	⋮ □	Item	1896-S			ATHENS Desk			

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.

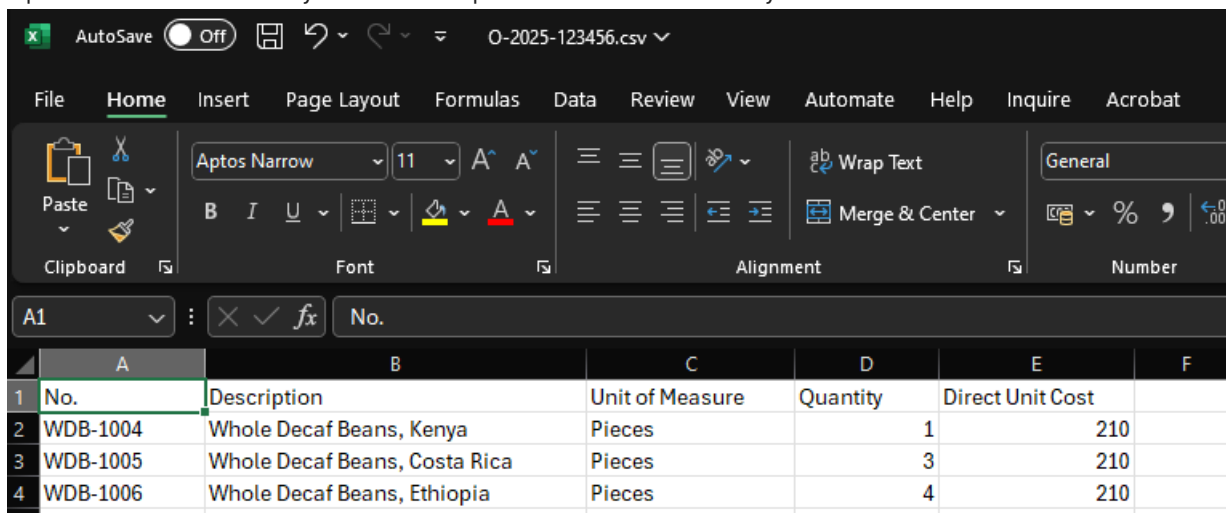
Import File Export From Another System

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.



	A	B	C	D	E	F
1	No.	Description	Unit of Measure	Quantity	Direct Unit Cost	
2	WDB-1004	Whole Decaf Beans, Kenya	Pieces	1	210	
3	WDB-1005	Whole Decaf Beans, Costa Rica	Pieces	3	210	
4	WDB-1006	Whole Decaf Beans, Ethiopia	Pieces	4	210	

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.