BEYOND

Trade In

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Preface

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

Read this documentation in full to set up **Beyond Trade In** 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 Trade In** 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	Autor	Comment
1.0	06.01.2025	Jannic Weidel	Initial version of the documentation
1.1	13.06.2025	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 Trade In is an extension for Microsoft Dynamics 365 Business Central.

Beyond Trade In allows you to take items in payment. The trade-in is similar to a sales claim. In the process a sales credit memo is created for the business partner.

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

NOTE

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

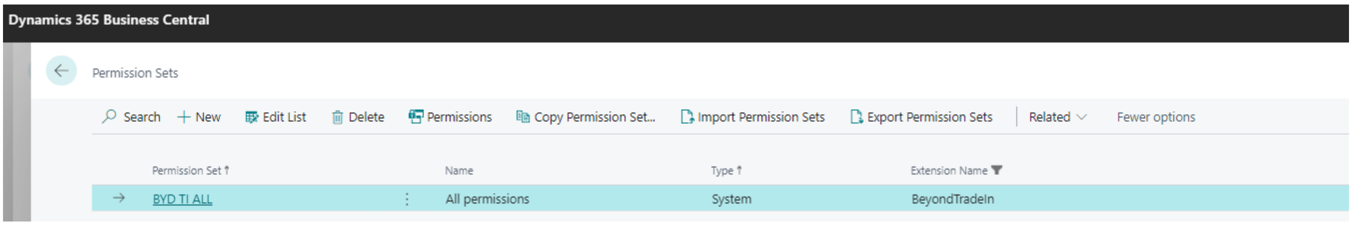
Documentation Information

Version	Date	Autor	Comment
1.0	08.05.2023	Jannic Weidel	Initial (English) Version of the documentation
1.1	13.06.2025	Jannic Weidel	Added Preface Chapter
Document Access		public	

Set up User Permissions for Trade-In

Special user authorizations are required to use Beyond Trade In. This chapter describes how to assign the authorization to use Beyond Trade In to a user.

To assign the user authorization for Beyond Trade In 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 corresponding search result.
3. The **Permission Sets** page is displayed.
4. Select the **BYD TI ALL** permission set from the list.
5. Click **Related** > **Permissions** > **Permission Set by User** in the menu bar.


6. The **User Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and use **Permission Set** and the value **BYD TI ALL** as filter criteria.
8. The list is filtered to the permission set **BYD TI ALL**.
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 rights for Beyond Trade In to a user. The user can now perform the setup for Beyond Trade In. Note that users with the **SUPER** authorization can also perform the setup for Beyond Trade In, so it is not necessary to assign the **BYD TI ALL** authorization if the user is already assigned the **SUPER** authorization set.

Setup Beyond Trade In

Set Up Beyond Trade In

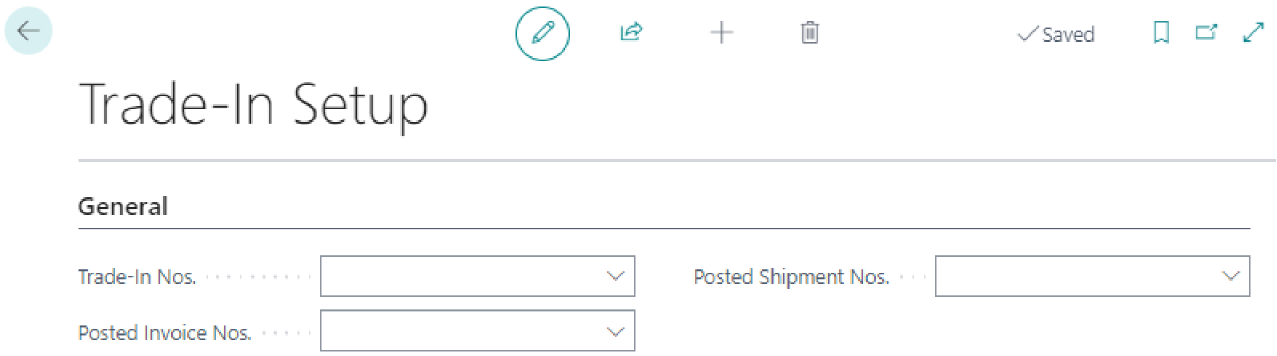
This chapter describes how to set up number series for use with Beyond Trade In. Note that certain user permissions (**SUPER** or **BYD TI ADMIN**) are required to set up Beyond Trade In. The contents of this chapter are divided into the following sections:

- Create a Number Series for Trade-Ins
- Create a Number Series for Posted Shipments
- Create a Number Series for Posted Invoices
- Copy Line Description to G/L Entry

Create a Number Series for Trade-Ins

This section describes how to set up the number series for trade-ins.
To set up the number series, proceed as follows:

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



4. Expand the dropdown menu for the **Trade-In Nos.** field.
5. Click the **Select from full list** option.
6. The window **Select - No. Series** is displayed.

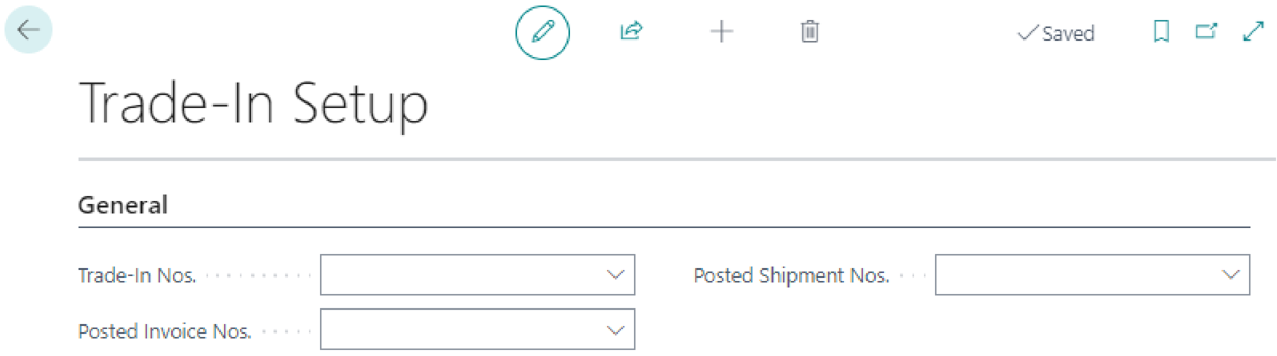
7. To create a new number series, click **New** in the menu bar.
8. A new line is created.
9. Enter a code for the new number series under the **Code** column.
10. Enter a description for the new number series under the **Description** column.
11. Click in the input field under the **Starting No.** column.
12. The **Edit - No. Series Lines** window is displayed.
13. Under the **Starting Date** column, specify a date from which the number series should be used. You can specify the value **t** if the number series is to be used from today.
14. Define the start of the number series under the **Starting No.** column. For more information on number series, see the default help from Microsoft Business Central.
15. Click **Close** to finish setting up the number series lines and return to the **Edit - No. Series Lines** window.
16. Activate the **Default Nos.** checkbox for the created number series.

You have created the number series for trade-ins.

Create a Number Series for Posted Shipments

in diesem Abschnitt wird beschrieben, wie Sie die Nummernserie für gebuchte Lieferungen einrichten.
Um die Nummernserie einzurichten, gehen Sie wie folgt vor:

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



4. Expand the dropdown menu for the **Posted Shipment Nos.** field.
5. Click the **Select from full list** option.
6. The window **Select - No. Series** is displayed.

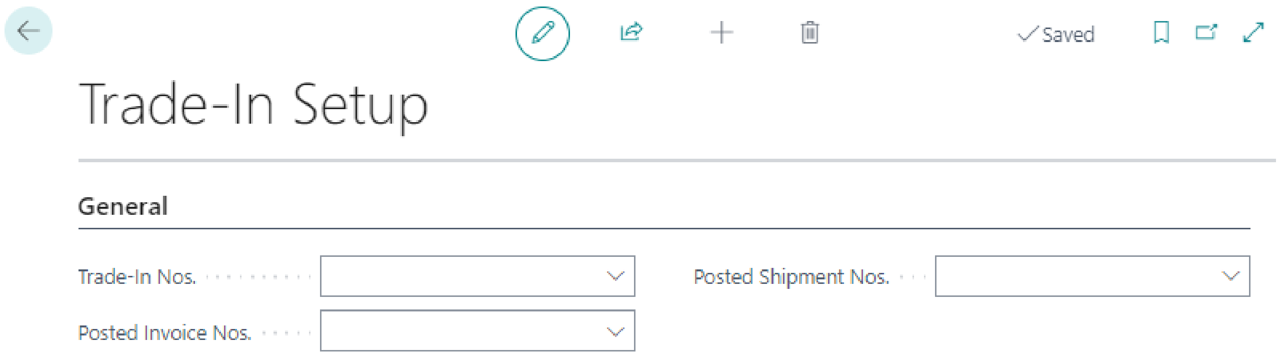
7. To create a new number series, click **New** in the menu bar.
8. A new line is created.
9. Enter a code for the new number series under the **Code** column.
10. Enter a description for the new number series under the **Description** column.
11. Click in the input field under the **Starting No.** column.
12. The **Edit - No. Series Lines** window is displayed.
13. Under the **Starting Date** column, specify a date from which the number series should be used. You can specify the value **t** if the number series is to be used from today.
14. Define the start of the number series under the **Starting No.** column. For more information on number series, see default help from Microsoft Business Central.
15. Click **Close** to finish setting up the number series lines and return to the **Edit - No. Series Lines** window.
16. Activate the **Default Nos.** checkbox for the created number series.

You have created the number series for posted Shipment Nos.

Create a Number Series for Posted Invoices

This section describes how to set up the number series for posted invoices.
To set up the number series, proceed as follows:

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



4. Expand the dropdown menu for the **Posted Invoice Nos.** field.
5. Click the **Select from full list** option.
6. The window **Select - No. Series** is displayed.

7. To create a new number series, click **New** in the menu bar.
8. A new line is created.
9. Enter a code for the new number series under the **Code** column.
10. Enter a description for the new number series under the **Description** column.
11. Click in the input field under the **Starting No.** column.
12. The **Edit - No. Series Lines** window is displayed.
13. Under the **Starting Date** column, specify a date from which the number series should be used. You can specify the value **t** if the number series is to be used from today.
14. Define the start of the number series under the **Starting No.** column. For more information on number series, see [default help from Microsoft Business Central](#).
15. Click **Close** to finish setting up the number series lines and return to the **Edit - No. Series Lines** window.
16. Activate the **Default Nos.** checkbox for the created number series.

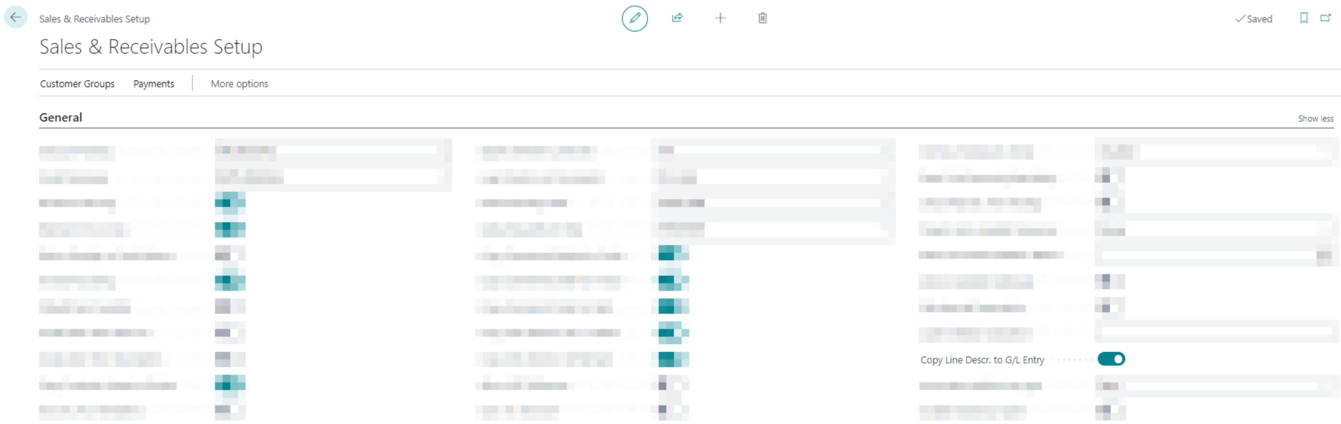
You have created the number series for Posted Invoice Nos.

Copy Line Description to G/L Entry

This section describes how to set the line description to be copied to G/L Entry. This setting is required so that you can create trade-ins.

To set line descriptions to be copied to G/L entries, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Sales & Receivables Setup** and click on the corresponding search result.
3. The **Sales & Receivables Setup** page is displayed.
4. Under the **General** tab, enable the slider for **Copy Line Description to G/L Item**. If the slider is not displayed, click the **Show more** option under the tab.

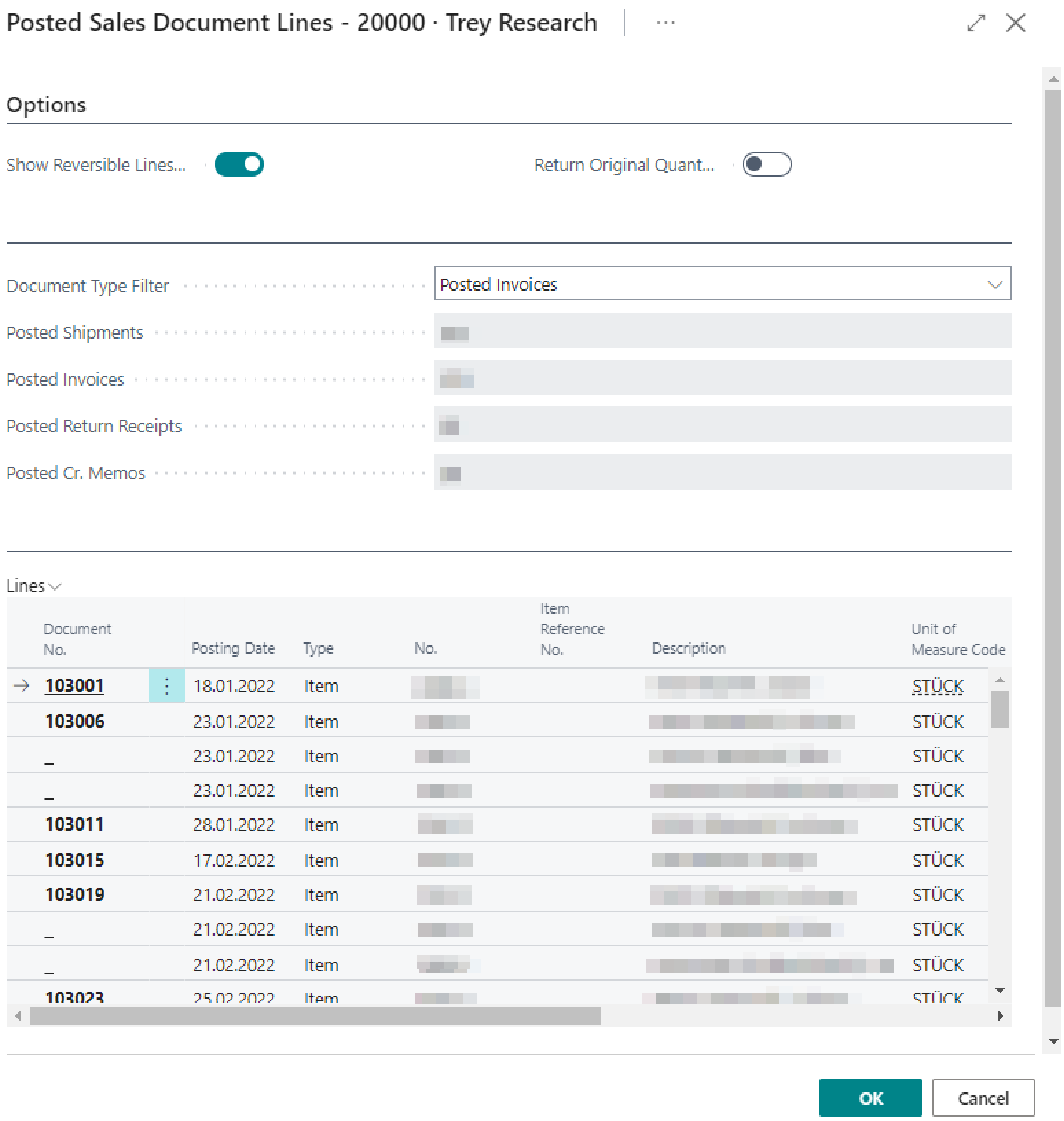


You have set to copy line descriptions to G/L entry. You have completed the setup of Beyond Trade In and can create trade-ins. For more information, see the chapter Create Trade-In.

Create Trade-In

This chapter describes how to create a trade-in.
To create a trade-in, proceed as follows:

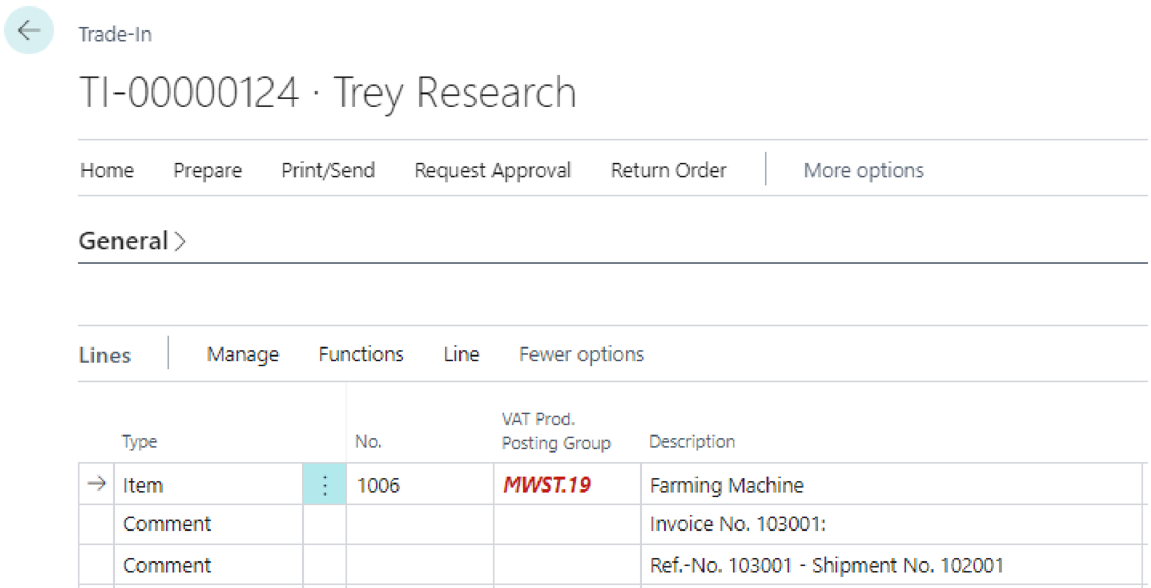
1. Open the search function from the role center (**ALT+Q**).
2. Search for **Trade-Ins** and click on the appropriate search result.
3. The **Trade-Ins** page is displayed.
4. To create a new trade-in, click **New** in the menu bar.
5. Under the **General** tab, specify a customer for the trade-in. The customer in this case is the business partner returning the items.
6. Click **Prepare** > **Get Posted Document Lines to Reverse...** in the menu bar.
7. The **Posted Sales Document Lines** window is displayed.



8. In the **Options** tab you can select the following options:
   - **Show Reversible Lines Only**: Specifies if only lines with quantities that are available to be reversed are shown. For example, on a posted sales invoice with an original quantity of 20, and 15 of the items have already been returned, the quantity that is available to be reversed on the posted sales invoice is 5.
   - **Show Reversible Lines Only**: Specifies whether to use the original quantity to receive quantities associated

with specific shipments. For example, on a posted sales invoice with an original quantity of 20, you can match the 20 items with a specific shipment.

9. In the dropdown menu for the **Document Type Filter** field, you can select the type of document for which you want to display the lines in the **Lines** tab. The number of documents is displayed below that dropdown menu.
10. To transfer a document line from the **Lines** tab to the trade-in, click on the digit under the **Document No.** column.
11. The document line will be transferred to the trade-in. In addition to this, lines of the type **Comment** are generated, which contain important information about the invoice number as well as delivery number.



You have created a trade-in.
To book the trade-in, click **Home** > **Post** in the menu bar as usual.