

# User Guide

## Barcode Scan Lite for

### Microsoft Dynamics 365

### Business Central

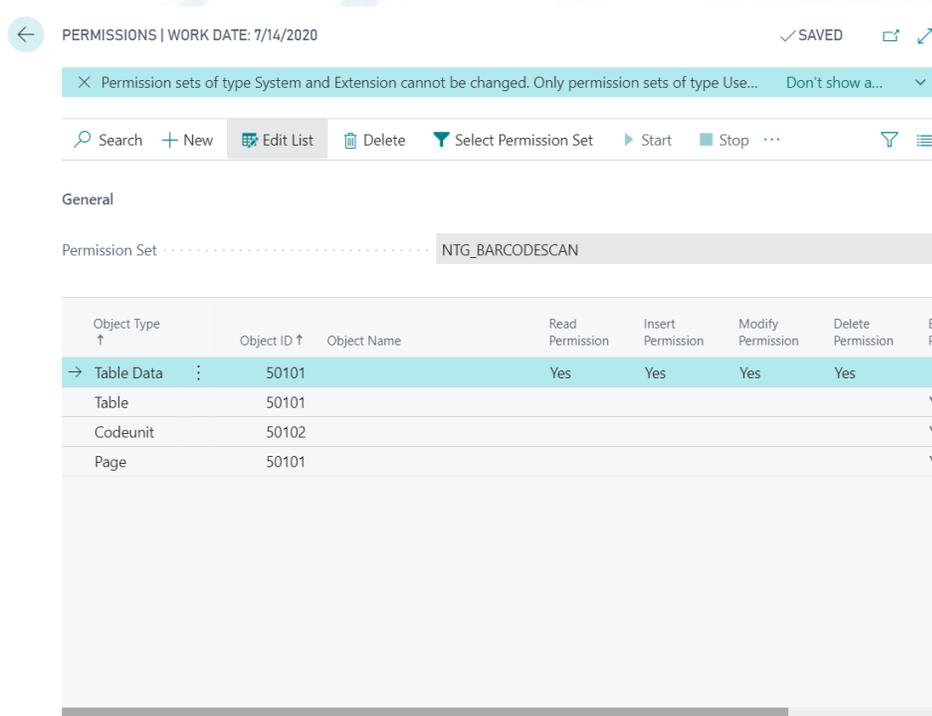
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The following procedure describes how to add items in Sales Order using the corresponding barcodes – by scanning with Barcode scanner, importing file with barcodes or manually typing barcodes.

## 1. New Permission Set – created by import

By installation of application the system will create a new Permission Set - NTG Barcode Scan with following permissions:



The screenshot shows the 'PERMISSIONS' configuration screen for the 'NTG\_BARCODESCAN' permission set. The interface includes a top navigation bar with a back arrow, the title 'PERMISSIONS | WORK DATE: 7/14/2020', and a 'SAVED' status indicator. A warning message states: 'Permission sets of type System and Extension cannot be changed. Only permission sets of type Use...'. Below this is a search bar and a toolbar with buttons for 'New', 'Edit List', 'Delete', 'Select Permission Set', 'Start', and 'Stop'. The 'General' section shows the selected 'Permission Set' as 'NTG\_BARCODESCAN'. A table lists the permissions for various object types:

Object Type	Object ID	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Exo Pe
→ Table Data	50101		Yes	Yes	Yes	Yes	
Table	50101						Ye
Codeunit	50102						Ye
Page	50101						Ye

## 2. User permissions setup

Setup User with following Permission Sets:

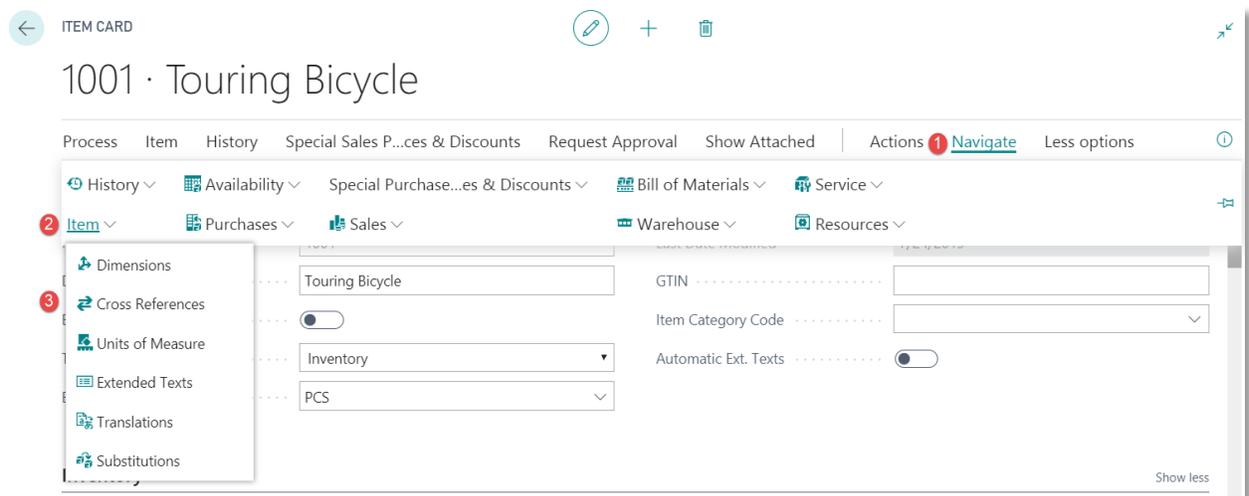
SUCCESS OR NOTHING

- NTG Barcode Scan
- D365 ASSEMBLY, VIEW
- D365 BASIC
- D365 SALES DOC, EDIT
- D365 SALES DOC, POST

### 3. Set up Barcodes

Before using this functionality you should create Barcodes for the items in **Item Cross-Reference Page**.

1. Choose the  icon, enter **Items**, and then choose the related link.
2. Open the card for an item for which you want to create a barcode cross reference
3. From the ribbon choose **Navigate -> Item -> Cross References**



4. In the related page **Item Cross Reference Entries** on a new line fill in the fields as necessary:
  - a. choose **Bar Code Cross-Reference** type
  - b. in **Cross-Reference No** enter the Barcode of the Item
  - c. in **Variant code** fill in the Variant code, if any
  - d. Choose **Unit of measure**

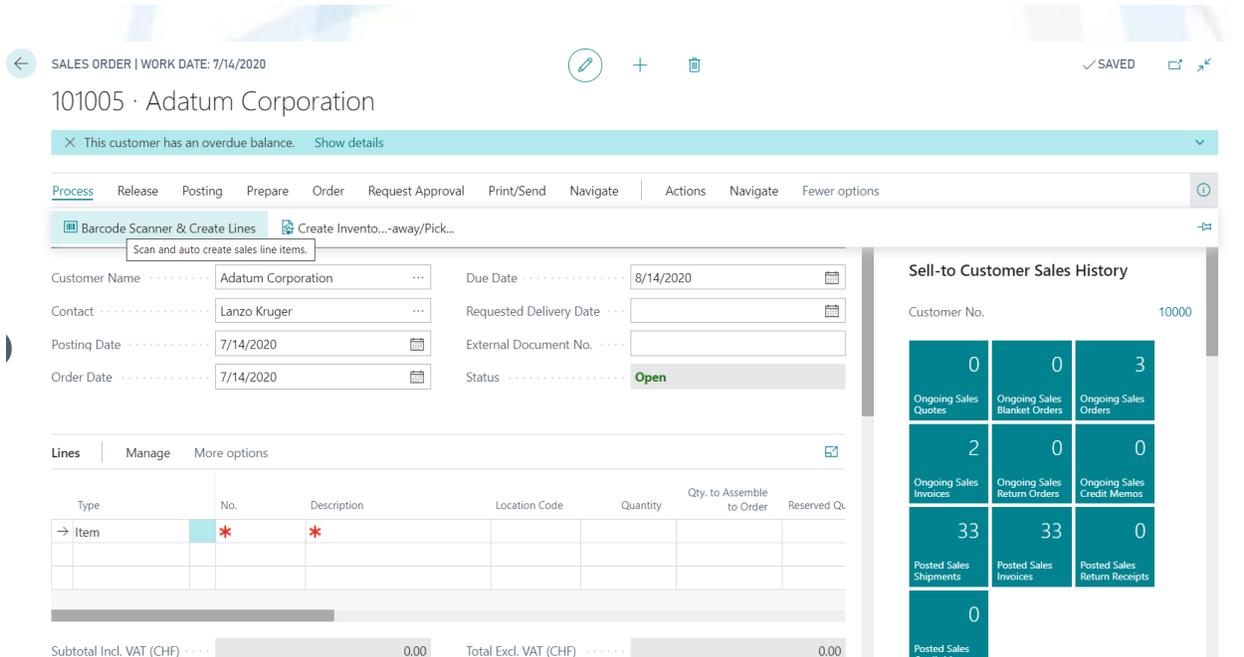
SUCCESS OR NOTHING

- e. **Description** – specifies a description of the item linked to this barcode cross reference that overrides the standard description of the item when entered on a order
- f. **Discontinue Bar code** – this option disallows the related barcode cross reference

## 4. Add Items in Barcode Scan Page

Now you could add items in sales order lines by using the registered barcodes.

1. Choose the  icon, enter **Sales orders**, and then choose the related link.
2. Create a new sales order with **New action**
3. On **Sales order header** choose Customer
4. Fill in the remaining fields on the **Sales order** page as necessary
5. Choose **Process -> Barcode Scanner & Create lines** action



SALES ORDER | WORK DATE: 7/14/2020

101005 · Adatum Corporation

This customer has an overdue balance. Show details

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navigate Fewer options

Barcode Scanner & Create Lines Create Invento...-away/Pick...  
Scan and auto create sales line items.

Customer Name: Adatum Corporation Due Date: 8/14/2020  
 Contact: Lanzo Kruger Requested Delivery Date:  
 Posting Date: 7/14/2020 External Document No.:  
 Order Date: 7/14/2020 Status: Open

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Ql.
→ Item	*	*				

Subtotal Incl. VAT (CHF) 0.00 Total Excl. VAT (CHF) 0.00

**Sell-to Customer Sales History**

Customer No. 10000

0	0	3
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
2	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
33	33	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

6. The related **Barcode Scan** page opens. There are 4 options for filling in the information (as described below).

The page consists of the following fields:

- a. **Barcode scanner** – choose this field and then scan the barcode or type it manually
- b. **Last Scanned Barcode** – the last scanned barcode is shown here

**SUCCESS OR NOTHING**

- c. **Last Scanned Item** – the last scanned item is shown here
- d. **Last Scanned Variant** – the last scanned variant of the item is shown here (if any)
- e. **Lines with scanned barcodes** – the scanned barcodes are displayed here, sorted descending; there is information about the number of the scanned item, its description, unit price, unit of measure code, quantity, variant code and variant description, vendor item number:

BARCODE SCAN ↶ ✕

Barcode Scanner

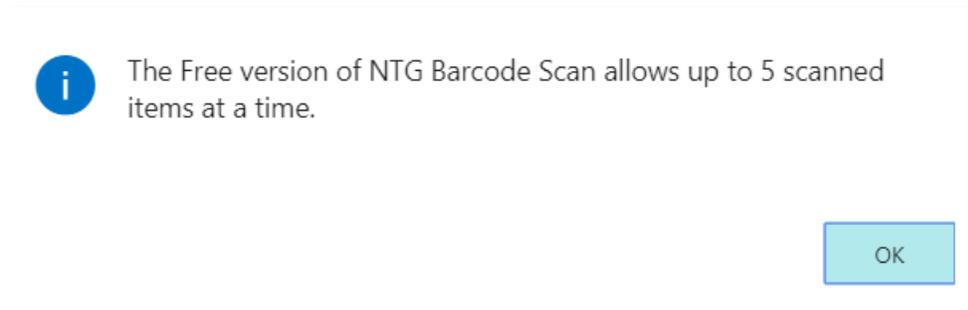
Last Scanned Barcode

Last Scanned Item

Last Scanned Variant

No.†	Scanned Barcode	Item No.	Item Description	Unit Price	Quantity	Unit of Measure Code	Variant Code	Variant Description	Vendor Item No.
→ 0				0.00	0.00				
<input type="text"/>									

**NOTE:** it is not possible to add/scan/import more than 5 lines with barcodes. If you add/scan more than 5 barcodes, a message is displayed:



To delete a line with scanned barcode you could choose **Delete line (1)**.

If you press **X** (2) or **Cancel** (3), **Barcode scan** page will be closed and no information in the page will be saved.

BARCODE SCAN ↗ ✕

Barcode Scanner

Last Scanned Barcode

Last Scanned Item

Last Scanned Variant

No. ↓	Scanned Barcode	Item No.	Item Description	Unit Price	Quantity	Unit of Measure Code	Variant Code	Variant Description	Vendor Item No.
→ 3	569007889156	1906-S	ATHEN Rollwagen	520.00	7.00	STK	BLACK	Black	
New Line	5702230983409	1960-S	ROM Beistellstuhl, grün	230.00	6.00	STK			
Delete Line	4007817504598	1968-S	MEXICO Bürostuhl	230.00	5.00	STK			
Select More									

As described above, there are 4 ways to add items in **Barcode scan** page:

- Scan Item Barcodes
- Import file with Item Barcodes
- Import file with Item Barcodes and Quantities
- Manually enter Barcodes

#### 4.1. Scan Item Barcodes

1. Choose **Barcode Scanner** field
2. Scan item's barcode with the Barcode scanner
3. The scanned barcodes are displayed on the lines

Barcode Scanner .....

Last Scanned Barcode .....

Last Scanned Item .....

Last Scanned Variant .....

No. ↓	Scanned Barcode	Item No.	Item Description	Unit Price	Quantity	Unit of Measure Code	Variant Code	Variant Description	Vendor Item No.
→ 3	569007889156	1906-S	ATHEN Rollwagen	520.00	7.00	STK	BLACK	Black	
2	5702230983409	1960-S	ROM Beistellstuhl, grün	230.00	6.00	STK			
1	4007817504598	1968-S	MEXICO Bürostuhl	230.00	5.00	STK			

4. Choose **OK** to import in sales order lines or **Cancel** to close the page without saving

#### 4.2. Import file with Item Barcodes

1. Prepare "TXT" file containing the barcodes, as displayed below – every barcode is on a new line:

 Scan barcodes.txt - Notepad

File Edit Format View Help

```
4007817504598
5702230983409
569007889156
```

2. Press **Import Barcodes**

BARCODE SCAN



Barcode Scanner .....  
Last Scanned Barcode .....  
Last Scanned Item .....  
Last Scanned Variant .....

No. ↑	Scanned Barcode	Item No.	Item Description	Unit Price	Quantity	Unit of Measure Code	Variant Code	Variant Description	Vendor Item No.
→ 0				0.00	0.00				



3. Upload the file

UPLOAD BARCODES 

4. Lines with scanned barcodes are created in the page, sorted descending:

SUCCESS OR NOTHING

BARCODE SCAN



Barcode Scanner :

Last Scanned Barcode :

Last Scanned Item :

Last Scanned Variant :

No. ↓	Scanned Barcode	Item No.	Item Description	Unit Price	Quantity	Unit of Measure Code	Variant Code	Variant Description	Vendor Item No.
→ 3	569007889156	1906-S	ATHEN Rollwagen	520.00	1.00	STK	BLACK	Black	
2	5702230983409	1960-S	ROM Beistellstuhl, grün	230.00	1.00	STK			
1	4007817504598	1968-S	MEXICO Bürostuhl	230.00	1.00	STK			

5. Choose **OK** to import items in sales order lines or **Cancel** to close the page without saving

#### 4.3. Import file with Item Barcodes and Quantities

1. Prepare "TXT" file containing the barcodes and the quantities, as displayed below – every barcode and quantity are on a new line, the separator is ";" :

 Scan barcodes qty.txt - Notepad

File Edit Format View Help

```
4007817504598;5
5702230983409;6
569007889156;7
```

2. Press **Import Barcodes and Quantities**

Barcode Scanner .....  
 Last Scanned Barcode .....  
 Last Scanned Item .....  
 Last Scanned Variant .....

No. ↓	Scanned Barcode	Item No.	Item Description	Unit Price	Quantity	Unit of Measure Code	Variant Code	Variant Description	Vendor Item No.
→ 0				0.00	0.00				



3. Upload the file

UPLOAD BARCODES WITH QUANTITY ↗

4. Lines with scanned barcodes are created in the page, sorted descending:

BARCODE SCAN



Barcode Scanner .....

Last Scanned Barcode .....

Last Scanned Item .....

Last Scanned Variant .....

No. ↓	Scanned Barcode	Item No.	Item Description	Unit Price	Quantity	Unit of Measure Code	Variant Code	Variant Description	Vendor Item No.
→ 3	569007889156	1906-S	ATHEN Rollwagen	520.00	7.00	STK	BLACK	Black	
2	5702230983409	1960-S	ROM Beistellstuhl, grün	230.00	6.00	STK			
1	4007817504598	1968-S	MEXICO Bürostuhl	230.00	5.00	STK			

5. If you import barcode, which is missing in Item Cross-reference table, the line in Barcode Scanner will be colored in red.

BARCODE SCAN



Barcode Scanner .....

Last Scanned Barcode ..... **99999911111**

Last Scanned Item .....

Last Scanned Variant .....

No. ↓	Scanned Barcode	Item No.	Item Description	Unit Price	Quantity	Unit of Measure Code	Variant Code	Variant Description	Vendor Item No.
→ 4	<b>99999911111</b>			<b>0.00</b>	<b>0.00</b>				
3	569007889156	1906-S	ATHEN Rollwagen	520.00	1.00	STK	BLACK	Black	
2	57022309834...	1960-S	ROM Beistellstuhl, grün	230.00	1.00	STK			
1	40078175045...	1968-S	MEXICO Bürostuhl	230.00	1.00	STK			

6. Choose **OK** to import items on sales order lines or **Cancel** to close the page without saving.

#### 4.4. Manually type Item Barcodes

1. Choose **Barcode Scanner** field
2. Type manually the item barcode in the field
3. The scanned items are displayed below in the lines
4. Choose **OK** to import items in sales order lines or **Cancel** to close the page without saving

### 5. Import Item Barcodes from Barcode Scan Page in Sales Order Lines

After you have scanned, imported or manually typed the barcodes, you could import items in Sales Order Lines.

When you press **OK** button in **Barcode Scan** page, the related items are imported in sales order lines. A new line for every combination of item-variant-unit of measure is created, corresponding to the combinations in Item Cross Reference.

Now you could post your order with **Post** action.