User Guide
Barcode Scan Lite for
Microsoft Dynamics 365
Business Central

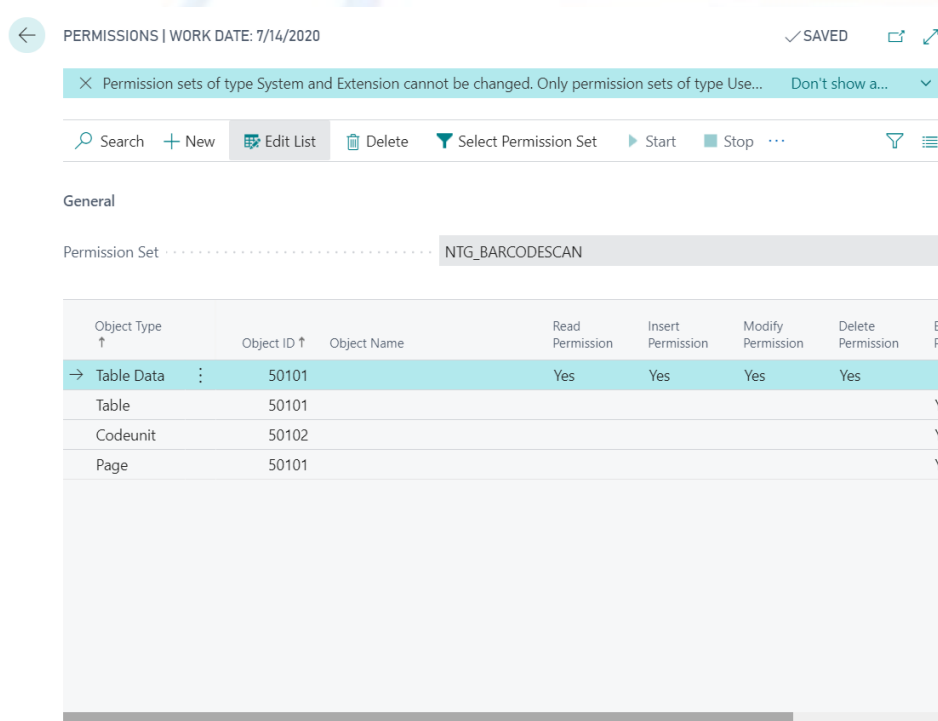# CONTENTS

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:

2. User permissions setup

Setup User with following Permission Sets:
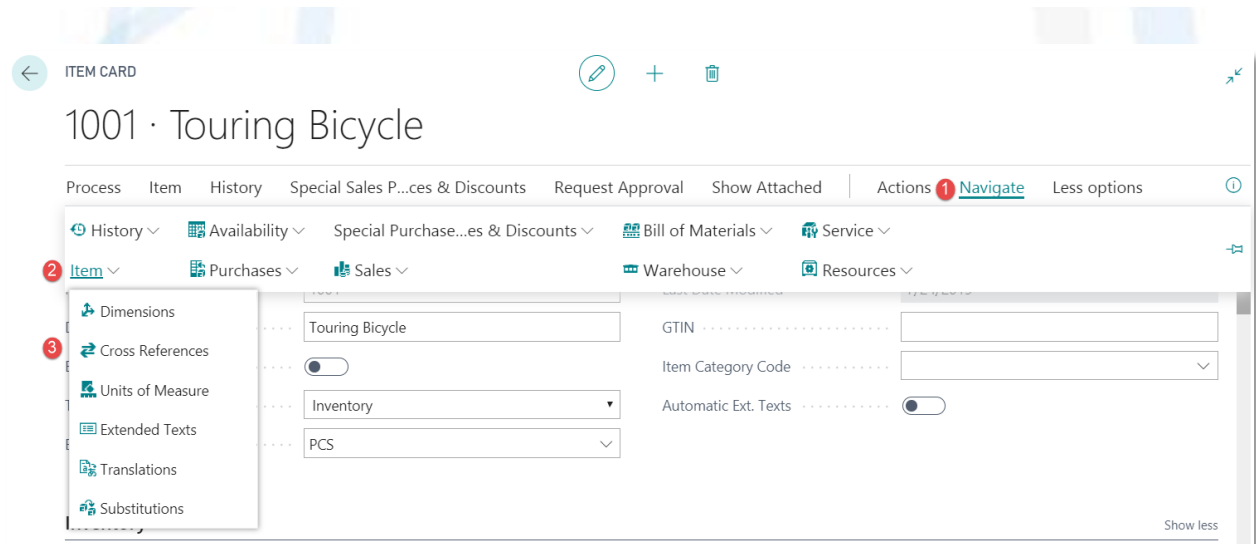
- NTG Barcode Scan
- D365 ASSEMBLY, VIEW
- D365 BASIC
- D365 SALES DOC, EDIT
- D365 SALES DOC, POST

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**
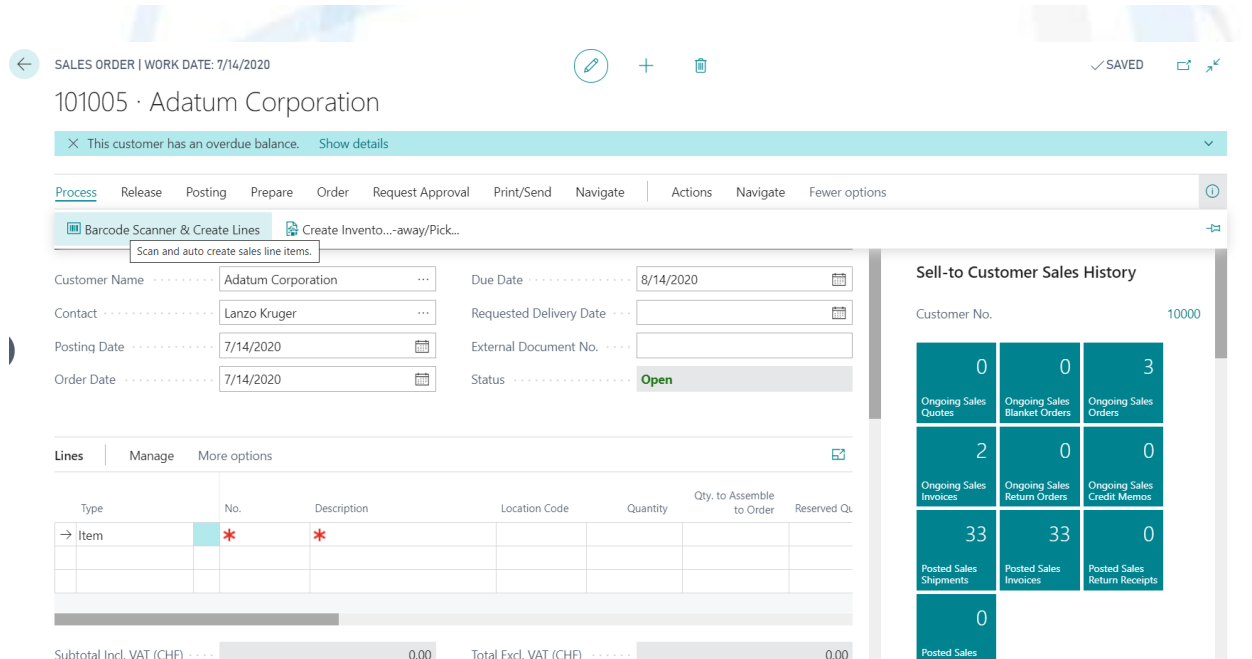
e. **Description –** specifies a description of the item linked to this barcode cross reference that overrides the standard description of the item when entered on a order

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

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

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:

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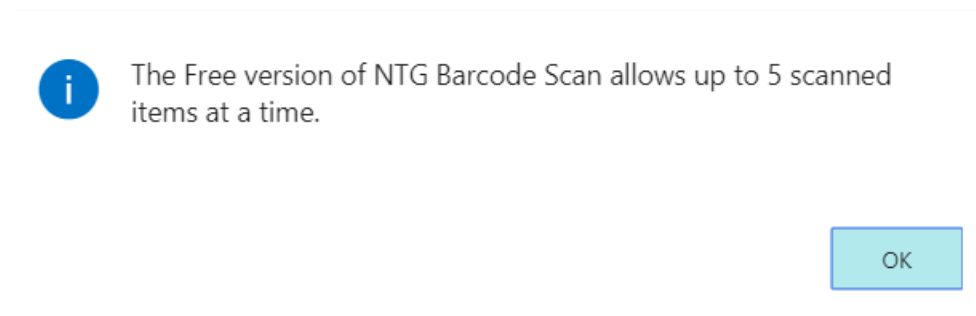
To delete a line with scanned barcode you could choose **Delete line** (1).

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

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

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:

2. Press **Import Barcodes**

SUCCESS OR NOTHING

3. Upload the file

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

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 ";" :

2. Press **Import Barcodes and Quantities**

3. Upload the file

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

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

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.

SUCCESS OR NOTHING