



BEYOND

ADDITIONAL INFORMATION

User Guide



BEYONDIT GmbH

Schauenburgerstr. 116
24118 Kiel
Germany
+ 49 431 3630 3700
hello@beyondit.gmbh

Table of Contents

About BEYOND AdditionalInformation

Setup

- Assign User Permissions

Features

- Add Additional Information to Item

- Add Additional Information to Service Item

- Mark Additional Information as Completed

About BEYOND AdditionalInformation

About this extension

BEYOND Additional Information is an extension for Microsoft Dynamics 365 Business Central.

It is developed by:

BEYONDIT GmbH

Schauenburgerstraße 116

24118 Kiel

Germany

hello@beyondit.gmbh

+49 431 3630 3700

With BEYOND AdditionalInformation you can store information texts for items and service items.

A separate column in purchase and sales documents shows whether information texts for the item or service item are available in the document line. The additional information can be retrieved by clicking in the column. If required, you can hide the information via a check box (mark as read).

The examples described in this documentation represent only a part of the possibilities offered by the BEYOND AdditionalInformation solution. If you have a specific case that you would like to map via the solution, please feel free to contact us.

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

NOTE

No dependencies on or to other apps

No dependent applications are required to use BEYOND AdditionalInformation, i.e. you do not need to install any additional applications.

Documentation Information

Version	Date	Author	Comment
1.0	20.03.2023	Jannic Weidel	Initial Version of the Documentation
1.1	10.05.2023	Jannic Weidel	Added Chapter for assigning permission sets
Access		public	

[Continue with the next chapter](#)

Assign User Permissions

The following description shows how to assign user permissions for the **BEYOND AdditionalInformation** extension. The permission sets provided are:

User Permission	Description
BYD AI USER	<ul style="list-style-type: none">• Create and edit texts• Show texts on cards and pages• Mark texts as completed
BYD AI READER	<ul style="list-style-type: none">• Show texts on cards and pages

To assign the user permission for BEYOND AdditionalInformation 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.

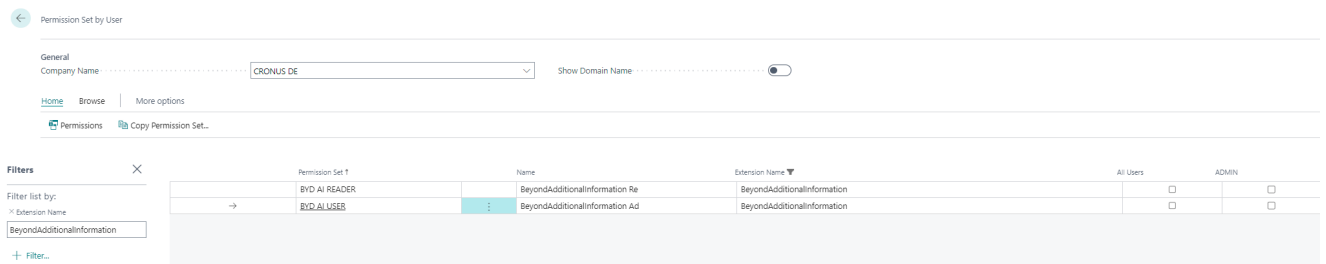


Figure: Permission Sets for BEYOND AdditionalInformation

6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondAdditionalInformation** as filter criteria.
8. The list is filtered to the permission sets of **BeyondAdditionalInformation**.
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 AdditionalInformation** 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.

[Add Additional Information to Items](#)

Add Additional Information to Items

This chapter describes how to add additional information to an item.

If there are additional information for an item and the item is used in a sales or purchase document, an icon is displayed in the document lines under the **Additional Information** column to indicate that there are information for the item.

To add information to an item, proceed as follows:

1. Open the search from the role center (**ALT+Q**).
2. Search for **Items** and click on the corresponding search result.
3. The **Items** list is displayed.
4. Open the item card for the item for which you want to store additional information.
5. In the menu bar, click **Related > Item > Additional Information**.

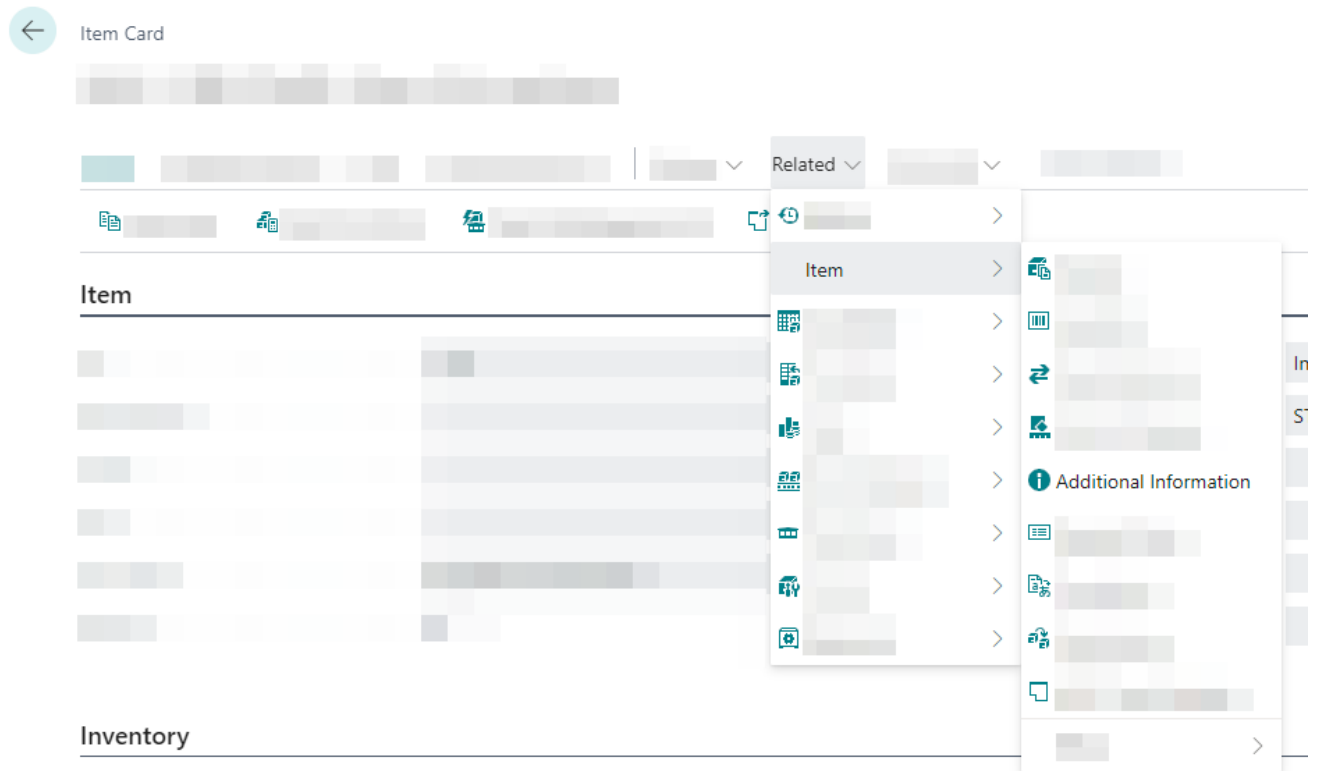


Figure: Additional Information option on Item Card

6. The **Additional Information** window is displayed.
7. In the menu bar, click **New**. Alternatively, you can press the **ALT+N** key combination to create a new line.
8. Under the **Information** column, enter the text.

You added additional information to the item.

If the item is used in a document, an exclamation mark is displayed in the **Additional Information** column indicating that additional information is related to this item.

[Blurred header area]

General >

Lines | Manage | Line | Order | Fewer options

Type	No.	Additional Information		
→ Item	1001	!		

Figure: Additional Information in a Sales Order

[Blurred header area]

General >

Place of Action >

Lines | Manage | [Blurred icons]

Type	No.	Additional Information	Description
→ Item	1001	!	[Blurred description]

Figure: Additional Information for an item in a Service Item Worksheet

Continue with the chapter [Mark Additional Information as completed](#)

Add Additional Information to Service Items

This chapter describes how to add additional information for a service item.

If additional information are stored for a service item and this service item is used in a purchase or sales document, an icon is displayed in the document lines under the **Additional Information** column to indicate that additional information are stored.

To add additional information for a service item, proceed as follows:

1. Open the search from the role center (**ALT+Q**).
2. Search for **Service Items** and click on the corresponding search result.
3. The **Service Items** list is displayed.
4. Open the service item card for the service item for which you want to store additional information.
5. In the menu bar, click **Related > Service Item > Additional Information**.

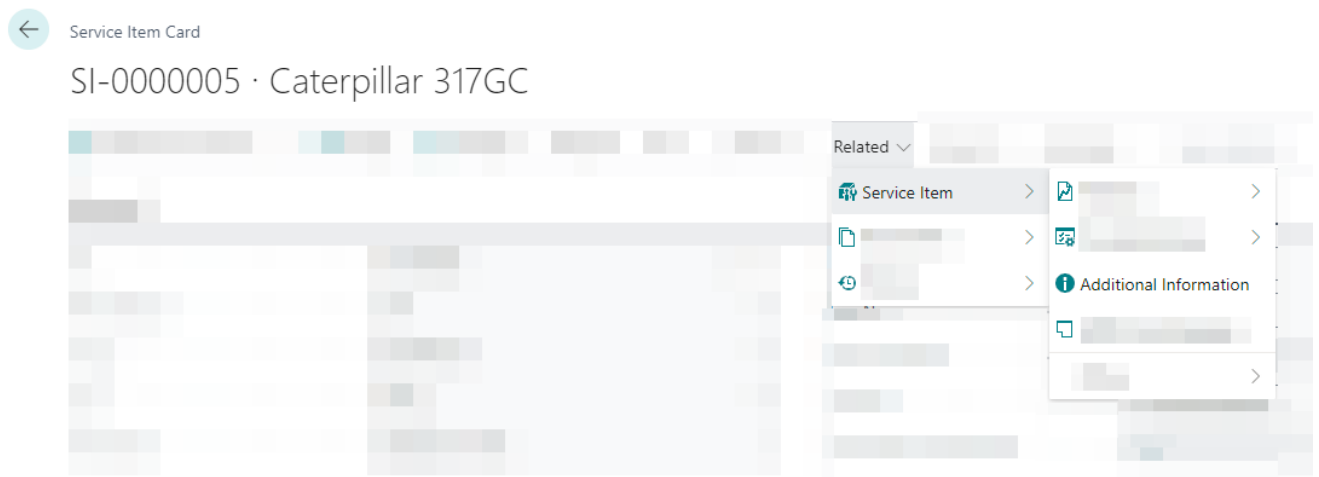


Figure: Additional Information option on Service Item Card

6. The **Additional Information** window is displayed.
7. In the menu bar, click **New**. Alternatively, you can press the **ALT+N** key combination to create a new line.
8. Under the **Information** column, enter the text.

You have stored additional information for a service item.

If the service item is used in a document (or in a service item worksheet), an exclamation mark is displayed in the **Additional Information** column.



Service Order



General >

Lines | Manage | Line | Functions | Order | Fewer options

	Service Item No.	Add... Info...	Item No.	Service Item Group Code	Serial No.	Description
→	SI-0000001	:	!	EXCAVATOR	CAT1653165...	Caterpillar 323 - Tier 4F / EU St...

Figure: Additional Information for Service Item in a Service Document

Continue with the chapter [Mark Additional Information as completed](#)

Mark Additional Information as completed

This chapter describes how to mark additional information as completed.

When additional information for an item or service item are completed or the information is deleted, the exclamation mark in the **Additional Information** column in the documents is deleted.

To mark additional information as completed, proceed as follows:

1. Click the exclamation mark in the document line under the **Additional Information** column.
2. The **Additional Information** window is displayed.

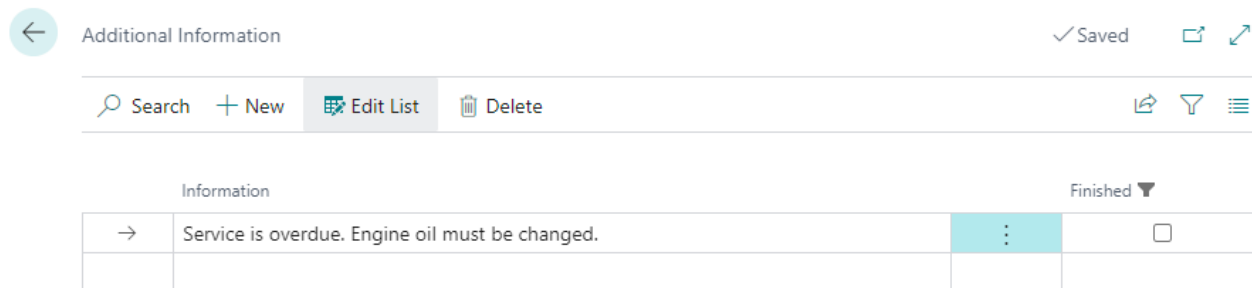


Figure: Additional Information

3. Click the **Edit list** option in the menu bar.
4. Select the check box under the **Finished** column for the additional information.

You have marked the information as **Completed**.