



BEYOND

ATTRIBUTES

User Guide



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About BEYOND Attributes

About this extension

BEYOND Attributes is an extension for Microsoft Dynamics 365 Business Central.

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BEYOND Attributes is used to store and maintain additional data on service items, items and fixed assets. After installation, an area is added to the corresponding lists and the cards in the info box, where you can enter characteristics and additional data (hereinafter referred to as attributes).

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

The examples described in this documentation represent only a part of the possibilities that the BEYOND Attributes 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

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.

Version	Date	Author	Comment
1.0	27.03.2023	Jannic Weidel	Initial Version of the Documentation
1.1	10.05.2023	Jannic Weidel	Added Chapter for assigning permission sets
1.2	04.09.2023	Jannic Weidel	Added new screenshots
Access		public	

[Next chapter](#)

Assign User Permissions

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

Permission Set	Description
BYD AT ALL	This permission set enables the use of the BeyondAttributesCore extension (hereafter referred to as “Beyond Attributes”).

To assign the permission set for **BEYOND Attributes** 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.

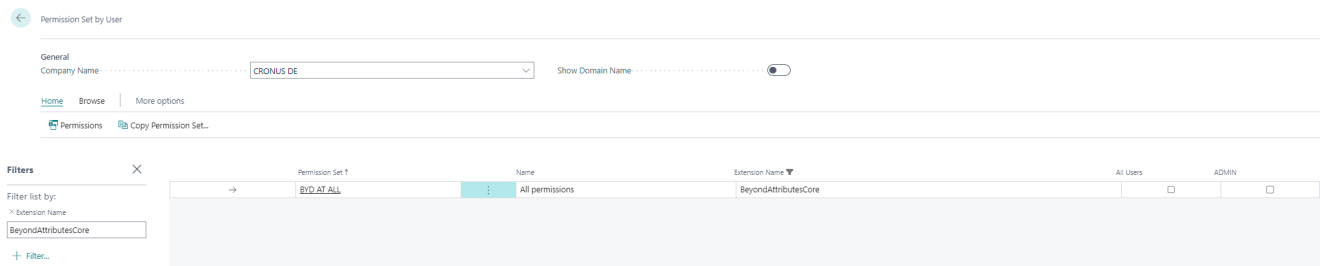


Figure: Permission Sets for BEYOND Attributes

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

Create Attribute

This chapter describes how to create an attribute to record or manage additional data of a service item.

Thanks to the 7 different attribute types, you can maintain a wide range of information about service items.

Click on the data type to quickly navigate to the description.

Attribute Type	Description
Option	The Option attribute type is used to create an attribute that provides a fixed choice of attribute values. For example, you can define this attribute type to specify the service item color and preset the attribute values Blue , Black , or Yellow . You can subsequently add additional option values for this attribute. For more information on how to add values to an attribute of the option data type, see the Create Option Attribute section.
Text	The Text attribute type is used to create an attribute that allows a text to be entered as a value. For example, this can be the manufacturer of a vehicle or machine.
Integer	The attribute type Integer is used to create an attribute that is stored with an integer value. This can be, for example, the status of the operating hours counter or the odometer reading of the vehicle.
Decimal	The attribute type Decimal is used to create an attribute that is stored with a decimal value. For example, you can store filling quantities (e.g. oil quantities) of the service item (the vehicle or machine).
Date	The attribute type Date is used to create an attribute that is stored with a date value. This can be, for example, the year of manufacture of the machine or the first registration of the vehicle.
Blob	The Blob attribute type is used when large amounts of data are to be stored. For example, you can use this attribute type to store a long descriptive text.

Create Option Attribute

To create an attribute of the **Option** type, proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Attribute** and click on the corresponding search result.
3. The **Attributes** page is displayed. On this page you will find all the configured attributes.
4. To create a new attribute, click **New** in the menu bar.
5. A new window is displayed.

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✓ Saved

🔗 ↗

Attribute

Actions ▾

Automate ▾

Name

Values

—

Type

Option ▾

Blocked

☒

Mandatory

☒

Sorting No.

Not Editable in Servic... ..

☒

Activate on Entity

Manage

🔗 🗑️

Related Entity Name

→	—	

Figure: Create Attribute

- Enter a name for the attribute in the **Name** input field.
- In the **Type** field, define the **Option** data type.
- To create the available selection values for the attribute, click in the **Values** field.
- Click **New** in the menu bar to create a selectable option for the attribute. Return to the **Attribute** page when you have added all the options.
- The **Blocked** slider is used to prevent the attribute from being used (for example, if the attribute values are not yet or no longer complete).
- Activate the **Mandatory** slider if you want to set that the data for this attribute must be filled on the service item.
- In the **Sorting No.** input field, specify a value for the sorting order of the attribute. You can specify positive and negative numbers in this field.
- Activate the **Not editable in ServiceApp** to restrict users of the ServiceApp to change values of the attribute.
- Under the **Activate on Entity** section, you can assign the created attribute to an entity. You can assign the attribute to items, assets and service items. Depending on which assignment you have made, the attribute is displayed in the attribute area in the info box area.

Select Entity

🔍 ▾ ...

↗ ✕

Object Caption

Item

Fixed Asset

→ Service Item

⋮

Figure: Assign Entity

NOTE

Sorting Order

The sorting order of the displayed attributes in the service item factbox depends on the specified number values in the **Sorting No.** field. For example, a negative value (e.g. -1) ensures that the attribute is displayed before all other attributes with positive sort order. For more information on sort order, see the [Change Sorting Order for Attributes](#) chapter.

You have created an attribute. If your colleagues use the web client in different display languages, you can store translations for the attributes and attribute values. For more information on how to add the translations for attributes and attribute values, see the [Add translations](#) chapter.

Create Text Attribute

To create an attribute of type **Text**, proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Attribute** and click on the corresponding search result.
3. The **Attributes** page is displayed. On this page you will find all the configured attributes.
4. To create a new attribute, click **New** in the menu bar.
5. A new window is displayed.

Attribute

Actions ▾ Automate ▾

Name



Type Text ▾

Blocked ☐

Mandatory ☐

Sorting No.

Not Editable in ServiceApp ☐

Activate on Entity | Manage  

Related Entity Name

→	

Figure: Create Attribute

6. Enter a name for the attribute in the **Name** input field.
7. Define the data type **Text** in the **Type** field. The **Blocked** slider is used to prevent the attribute from being used (for example, if the attribute values are not yet complete or are no longer complete).
8. Activate the **Mandatory** slider if you want to set that the data for this attribute must be filled on the service item.
9. In the **Sorting No.** input field, specify a value for the sorting order of the attribute. You can specify positive and negative numbers in this field.
10. Activate the **Not editable in ServiceApp** to restrict users of the ServiceApp to change values of the attribute.

11. Under the **Activate on Entity** section, you can assign the created attribute to an entity. You can assign the attribute to items, assets and service items. Depending on which assignment you have made, the attribute is displayed in the attribute area in the info box area.

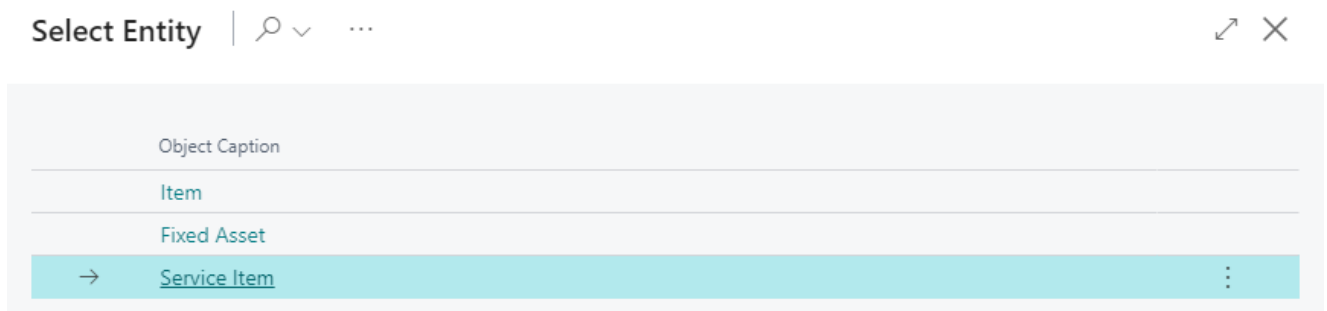


Figure: Assign Entity

i NOTE

Sorting Order

The sorting order of the displayed attributes in the service item factbox depends on the specified number values in the **Sorting No.** field. For example, a negative value (e.g. -1) ensures that the attribute is displayed before all other attributes with positive sort order. For more information on sort order, see the [Change Sorting Order for Attributes](#) chapter.

You have created an attribute. If your colleagues use the web client in different display languages, you can store translations for the attributes and attribute values. For more information on how to add the translations for attributes and attribute values, see the [Add translations](#) chapter.

Create Integer Attribute

To create an attribute of type **Integer**, proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Attribute** and click on the corresponding search result.
3. The **Attributes** page is displayed. On this page you will find all the configured attributes.
4. To create a new attribute, click **New** in the menu bar.
5. A new window is displayed.

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✓ Saved

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Attribute

Actions ▾

Automate ▾

Name

Type

Blocked

Mandatory

Sorting No.

Not Editable in ServiceApp

Activate on Entity

Manage

↗

↗

Related Entity Name

→	-	

Figure: Create Attribute

- Enter a name for the attribute in the **Name** input field.
- Define the data type **Integer** in the **Type** field. The **Blocked** slider is used to prevent the attribute from being used (for example, if the attribute values are not yet complete or are no longer complete).
- Activate the **Mandatory** slider if you want to set that the data for this attribute must be filled on the service item.
- In the **Sorting No.** input field, specify a value for the sorting order of the attribute. You can specify positive and negative numbers in this field.
- Activate the **Not editable in ServiceApp** to restrict users of the ServiceApp to change values of the attribute.
- Under the **Activate on Entity** section, you can assign the created attribute to an entity. You can assign the attribute to items, assets and service items. Depending on which assignment you have made, the attribute is displayed in the attribute area in the info box area.

Select Entity

🔍

▾

...

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Object Caption

Item

Fixed Asset

→ Service Item ⋮

Figure: Assign Entity

NOTE

Sorting Order

The sorting order of the displayed attributes in the service item factbox depends on the specified number values in the **Sorting No.** field. For example, a negative value (e.g. -1) ensures that the attribute is displayed before all other attributes with positive sort order. For more information on sort order, see the [Change Sorting Order for Attributes](#) chapter.

You have created an attribute. If your colleagues use the web client in different display languages, you can store translations for the attributes and attribute values. For more information on how to add the translations for attributes and attribute values, see the [Add translations](#) chapter.

Create Decimal Attribute

To create an attribute of the **Decimal** (decimal number) type, proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Attribute** and click on the corresponding search result.
3. The **Attributes** page is displayed. On this page you will find all the configured attributes.
4. To create a new attribute, click **New** in the menu bar.
5. A new window is displayed.

✓ Saved

Attribute

Actions ▾ Automate ▾

Name

Type

Decimal ▾

Blocked

☐

Mandatory

☐

Sorting No.

Not Editable in ServiceApp

☐

Activate on Entity

Manage

Related Entity Name

→	—	

Figure: Create Attribute

6. Enter a name for the attribute in the **Name** input field.
7. Define the data type **Decimal** in the **Type** field. The **Blocked** slider is used to prevent the attribute from being used (for example, if the attribute values are not yet complete or are no longer complete).
8. Activate the **Mandatory** slider if you want to set that the data for this attribute must be filled on the service item.
9. In the **Sorting No.** input field, specify a value for the sorting order of the attribute. You can specify positive and negative numbers in this field.
10. Activate the **Not editable in ServiceApp** to restrict users of the ServiceApp to change values of the attribute.
11. Under the **Activate on Entity** section, you can assign the created attribute to an entity. You can assign the attribute to items, assets and service items. Depending on which assignment you have made, the attribute is displayed in the attribute area in the info box area.

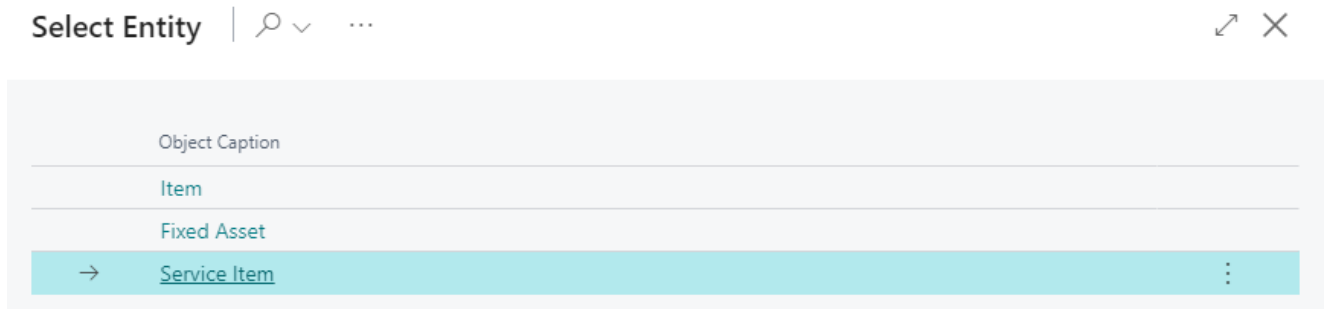


Figure: Assign Entity

NOTE

Sorting Order

The sorting order of the displayed attributes in the service item factbox depends on the specified number values in the **Sorting No.** field. For example, a negative value (e.g. -1) ensures that the attribute is displayed before all other attributes with positive sort order. For more information on sort order, see the [Change Sorting Order for Attributes](#) chapter.

You have created an attribute. If your colleagues use the web client in different display languages, you can store translations for the attributes and attribute values. For more information on how to add the translations for attributes and attribute values, see the [Add translations](#) chapter.

Create Date Attribute

To create an attribute of the **Date** type, proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Attribute** and click on the corresponding search result.
3. The **Attributes** page is displayed. On this page you will find all the configured attributes.
4. To create a new attribute, click **New** in the menu bar.
5. A new window is displayed.



✓ Saved



Attribute

Actions ▾ Automate ▾

Name	<input type="text"/>
Type	<input type="text" value="Date"/>
Blocked	<input type="checkbox"/>
Mandatory	<input checked="" type="checkbox"/>
Sorting No.	<input type="text"/>
Not Editable in ServiceApp	<input type="checkbox"/>

Activate on Entity

Manage



Related Entity Name		
→	-	

Figure: Create Attribute

6. Enter a name for the attribute in the **Name** input field.
7. Define the data type **Date** in the **Type** field. The **Blocked** slider is used to prevent the attribute from being used (for example, if the attribute values are not yet complete or are no longer complete).
8. Activate the **Mandatory** slider if you want to set that the data for this attribute must be filled on the service item.
9. In the **Sorting No.** input field, specify a value for the sorting order of the attribute. You can specify positive and negative numbers in this field.
10. Activate the **Not editable in ServiceApp** to restrict users of the ServiceApp to change values of the attribute.
11. Under the **Activate on Entity** section, you can assign the created attribute to an entity. You can assign the attribute to items, assets and service items. Depending on which assignment you have made, the attribute is displayed in the attribute area in the info box area.

Select Entity



Object Caption		
	Item	
	Fixed Asset	
→	Service Item	⋮

Figure: Assign Entity

NOTE

Sorting Order

The sorting order of the displayed attributes in the service item factbox depends on the specified number values in the **Sorting No.** field. For example, a negative value (e.g. -1) ensures that the attribute is displayed before all other attributes with positive sort order. For more information on sort order, see the [Change Sorting Order for Attributes](#) chapter.

You have created an attribute. If your colleagues use the web client in different display languages, you can store translations for the attributes and attribute values. For more information on how to add the translations for attributes and attribute values, see the [Add translations](#) chapter.

Create Blob Attribute

To create an attribute of type **Blob** (Binary Large Object), proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Attribute** and click on the corresponding search result.
3. The **Attributes** page is displayed. On this page you will find all the configured attributes.
4. To create a new attribute, click **New** in the menu bar.
5. A new window is displayed.

Attribute

Actions ▾ Automate ▾

Name

Type Blob ▾

Blocked ☐

Mandatory ☐

Sorting No.

Not Editable in ServiceApp ☐

Activate on Entity | Manage ↗ ↘

Related Entity Name

→	—	

Figure: Create Attribute

6. Enter a name for the attribute in the **Name** input field.
7. Define the data type **Blob** in the **Type** field. The **Blocked** slider is used to prevent the attribute from being used (for example, if the attribute values are not yet or no longer complete).
8. Activate the **Mandatory** slider if you want to set that the data for this attribute must be filled on the service item.
9. In the **Sorting No.** input field, specify a value for the sorting order of the attribute. You can specify positive and negative numbers in this field.
10. Activate the **Not editable in ServiceApp** to restrict users of the ServiceApp to change values of the attribute.

11. Under the **Activate on Entity** section, you can assign the created attribute to an entity. You can assign the attribute to items, assets and service items. Depending on which assignment you have made, the attribute is displayed in the attribute area in the info box area.

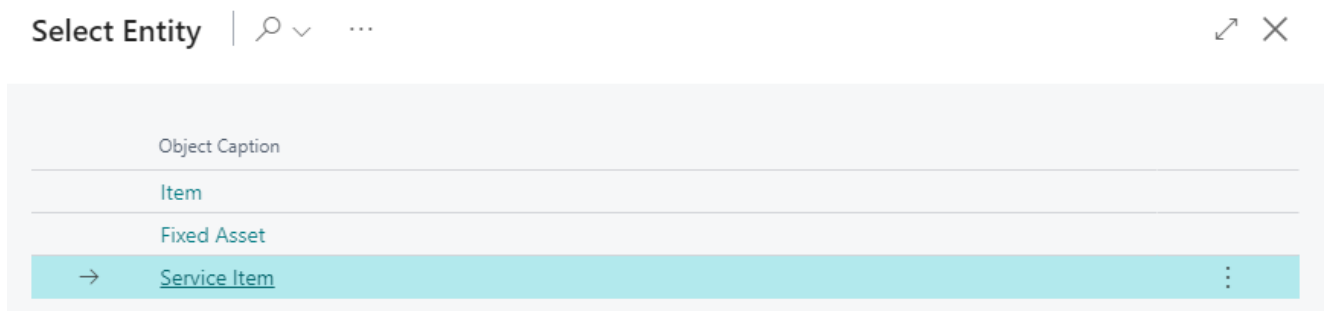


Figure: Assign Entity

NOTE

Sorting Order

The sorting order of the displayed attributes in the service item factbox depends on the specified number values in the **Sorting No.** field. For example, a negative value (e.g. -1) ensures that the attribute is displayed before all other attributes with positive sort order. For more information on sort order, see the [Change Sorting Order for Attributes](#) chapter.

You have created an attribute. If your colleagues use the web client in different display languages, you can store translations for the attributes and attribute values. For more information on how to add the translations for attributes and attribute values, see the [Add translations](#) chapter.

Add Translations

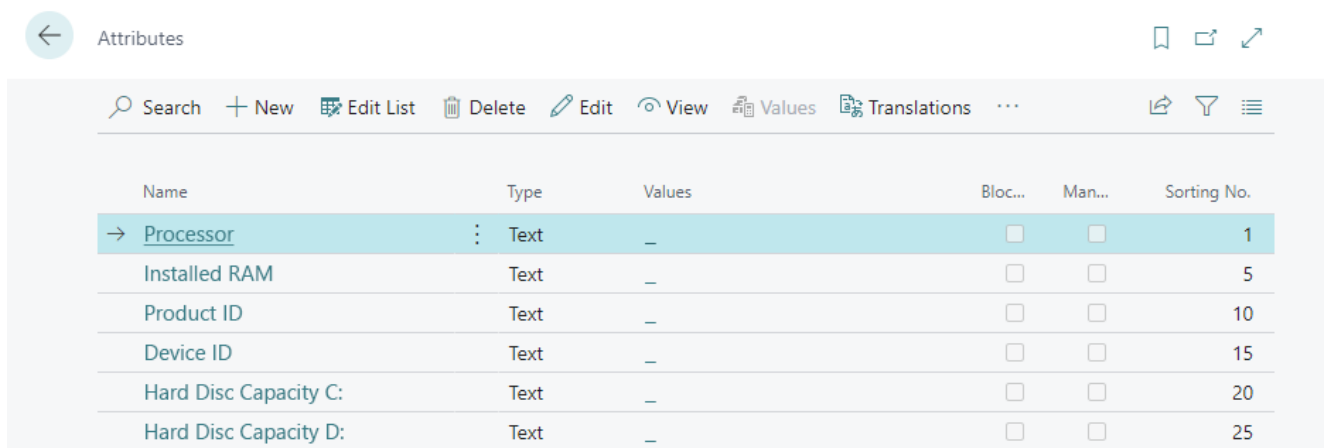
This chapter describes how to add translations to enable the use of attributes when different display languages are used. You can add translations for attribute names and the selectable options for attributes of the **Option** data type.

Add Translation for an Attribute

This section describes how to add a translation for an attribute.

Proceed as follows to add a translation for an attribute:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Attributes** and click on the corresponding search result.
3. The **Attributes** list is displayed. In this list you will find all attributes.



Name	Type	Values	Bloc...	Man...	Sorting No.
→ Processor	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	1
Installed RAM	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	5
Product ID	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	10
Device ID	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	15
Hard Disc Capacity C:	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	20
Hard Disc Capacity D:	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	25

Figure: Overview of the configured attributes

4. To add a translation to the attribute, select the attribute in the list and click **Translations** in the menu bar.
5. Under the **Language Code** column, enter the code of the language for which you want to enter the translation (for example, **DEU** for German or **ENU** for English).
6. Under the **Name** column, enter the translation for the attribute in the specified language.

You have added a translation for the name of an attribute. If you change the display language, the translation you specified will be used. For attributes of the **Option** data type, it is also possible to store translations for the selectable option values. For more information about this, see the following section [Add translation for an Attribute Value](#).

Add translation for an Attribute Value

This section describes how to add a translation for an option value of an attribute.

To add a translation for an option value of an attribute, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Attributes** and click on the corresponding search result.
3. The **Attributes** list is displayed. In this list you will find all attributes.

←

Attributes

🔖

📄

↗

🔍 Search

+ New

📋 Edit List

🗑 Delete

✎ Edit

👁 View

📊 Values

🗣 Translations

⋮

🔗

🔍

☰

Name	Type	Values	Bloc...	Man...	Sorting No.
→ <u>Processor</u>	⋮ Text	—	<input type="checkbox"/>	<input type="checkbox"/>	1
Installed RAM	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	5
Product ID	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	10
Device ID	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	15
Hard Disc Capacity C:	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	20
Hard Disc Capacity D:	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	25

Figure: Overview of the configured attributes

- To store a translation for one or more attribute values, click on the selectable options of the attribute in the list under the **Values** column.
- The selectable options for the attribute are displayed. Select the option for which you want to add a translation.
- Click **Actions > Process > Translations** in the menu bar.
- A new list is displayed.

←

Prozessor

✓ Saved

📄

↗

Attribute Translations

🔍 Search

+ New

📋 Edit List

🗑 Delete

🔗

🔍

☰

Language Code ↑	Name
→ DEU	⋮ Prozessor
ENU	Prozessor

Figure: Add translation

- Under the **Language Code** column, enter the code of the language for which you want to enter the translation (for example, **DEU** for German or **ENU** for English).
- Under the **Name** column, enter the translation for the option value.

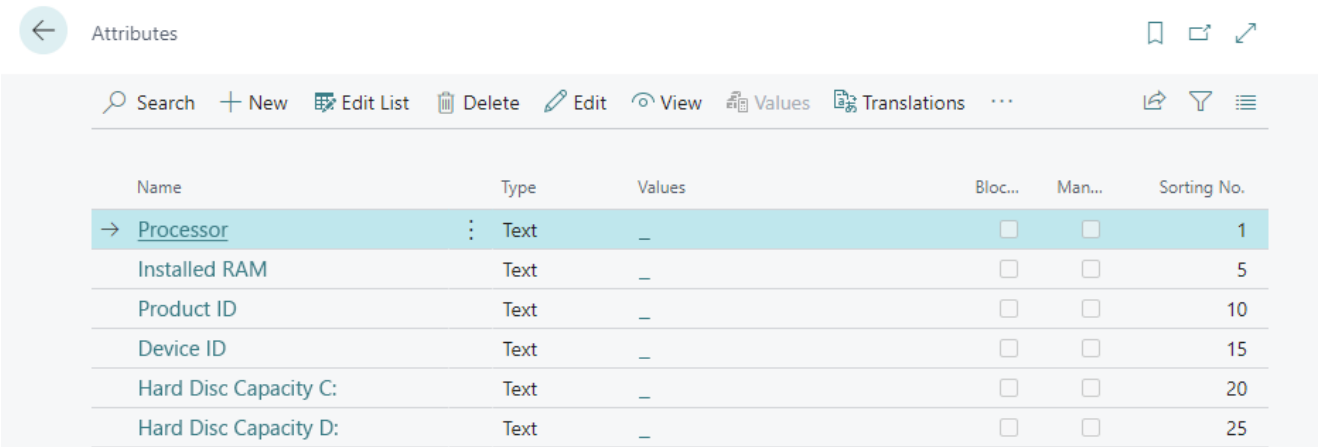
You have saved a translation for a selectable value of an option attribute. When you change the display language, the translation is applied to the option name.

Change Sorting Order for Attributes

This chapter describes how to change the sorting order for displaying attributes. The order in which attributes are displayed depends on the value under the **Sorting No.** field.

To change the sorting order of the attributes, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Attributes** and click on the corresponding search result.
3. The **Attributes** page is displayed. On this page you will find all configured attributes.

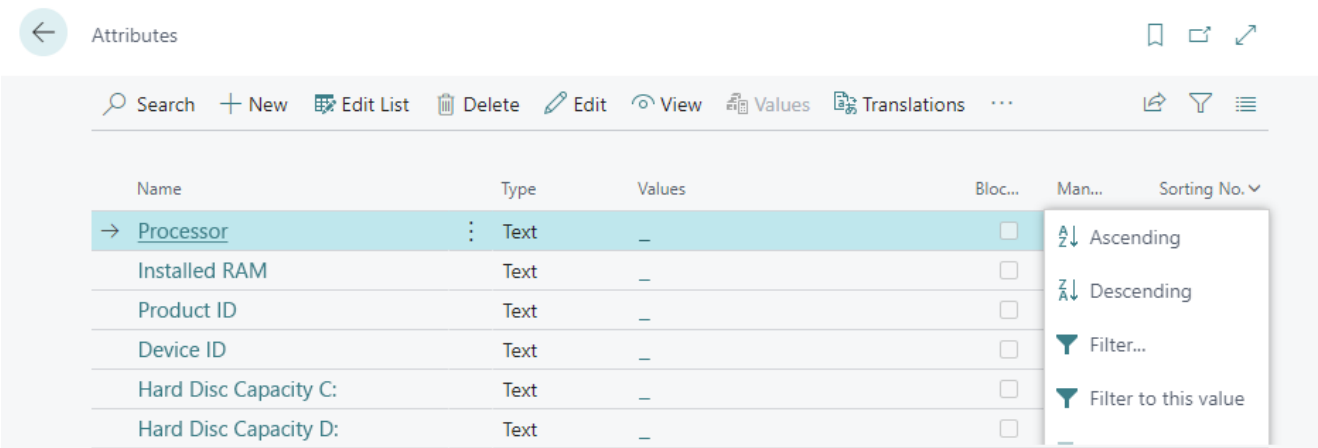


The screenshot shows the 'Attributes' page with a table of configured attributes. The table has columns for Name, Type, Values, Bloc..., Man..., and Sorting No. The attributes are listed in ascending order of their Sorting No. values.

Name	Type	Values	Bloc...	Man...	Sorting No.
→ Processor	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	1
Installed RAM	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	5
Product ID	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	10
Device ID	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	15
Hard Disc Capacity C:	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	20
Hard Disc Capacity D:	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	25

Figure: Overview over the configured attributes

4. To get an overview of which attribute is displayed first based on the order in the display, sort the **Sort** column in ascending order. To do this, click on the column header and select **Ascending** from the context menu.



The screenshot shows the 'Attributes' page with the 'Sorting No.' column header menu open. The menu options are: Ascending (selected), Descending, Filter..., and Filter to this value.

Name	Type	Values	Bloc...	Man...	Sorting No. ▼
→ Processor	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	1
Installed RAM	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	5
Product ID	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	10
Device ID	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	15
Hard Disc Capacity C:	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	20
Hard Disc Capacity D:	Text	—	<input type="checkbox"/>	<input type="checkbox"/>	25

Figure: Change Sorting Order

5. On the attribute card, adjust the value in the **Sorting No.** field for the attribute so that it appears at the desired position in the sequence. Note that negative values can also be used for the **Sorting No.** field.

You have changed the display order (**Sorting No.**) of the attributes.

Save Attributes on the Service Item

This chapter describes how to store additional information on the service item via an attribute.

To store a value for an attribute on the service item, do the following:

1. Open the search function 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. In this list you will find all service items.
4. Display the factbox (**ALT+F2**). The factbox area will show you the attributes for the service item.

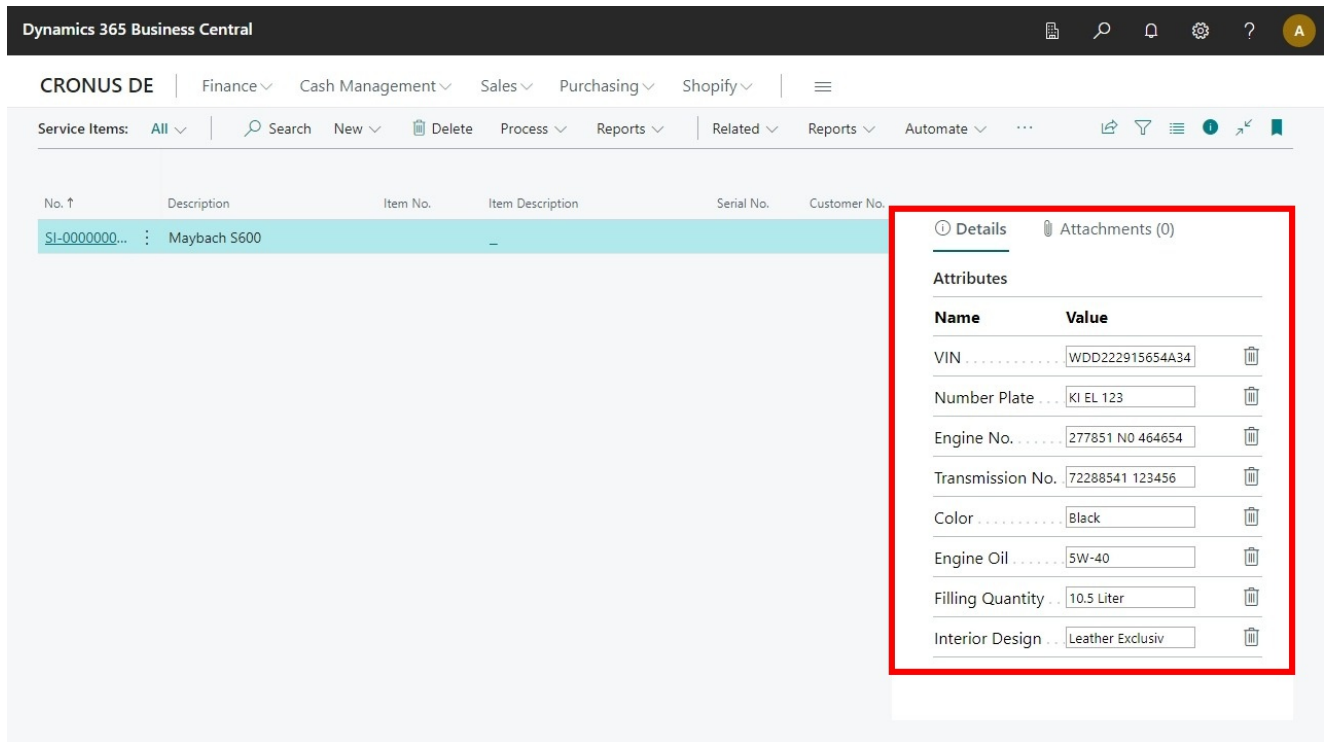


Figure: Overview of the configured attributes for service items

5. Enter a value in the attribute input field.

You have entered a value for an attribute on a service item.