



BEYOND

INDICATOR

User Guide



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About BEYOND Indicator

About this Extension

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

It was developed by:

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Beyond Indicator adds a column with a graphical display to your document lines.

You can customize the so-called "indicator" for document lines (purchase, sales and service) specific to your use case. The conditions of the indicator, as well as the graphical equivalent when a condition is true or false, are completely customizable.

For example, you can create an indicator for sales lines with the available item quantity (quantity of the item available in stock). Based on the graphical display in the corresponding column in the item lines, you can then directly see whether the desired quantity of the item is available in stock.

For more information, see the chapter [Create Indicator for Sales Lines for Available Quantity](#).

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

The examples described in this documentation represent only a part of the possibilities that the BEYOND Indicator 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 from or to other apps

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

Documentation Information

Version	Date	Author	Comment
1.0	20.01.2023	Jannic Weidel	Initial version of the documentation
1.1	12.05.2023	Jannic Weidel	Added Chapter for assigning permission sets
Access		public	

[Next Chapter](#)

Assign User Permissions

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

Permission Set	Description
BYD IC INDICATOR	This permission set enables the use of the BeyondIndicator extension.

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

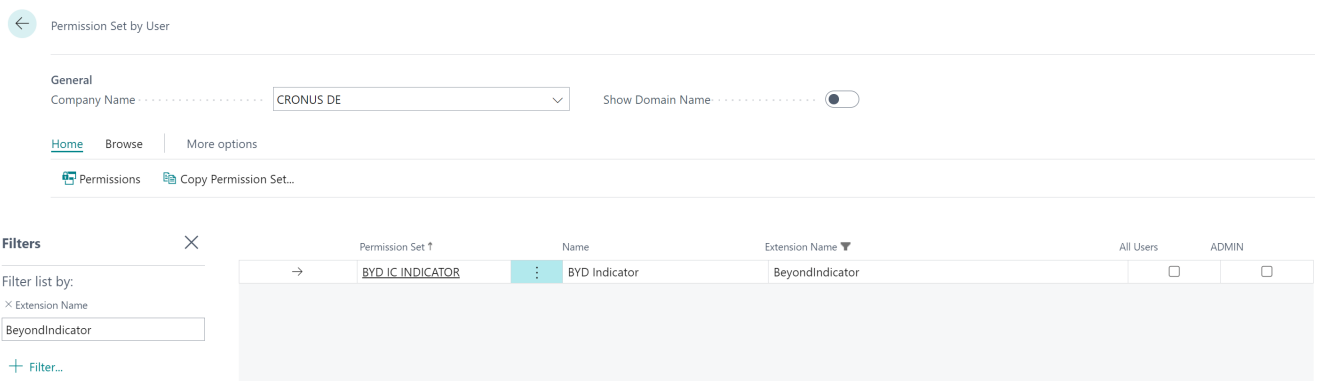


Figure: Permission Sets for BEYOND Indicator

6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondIndicator** as filter criteria.
8. The list is filtered to the permission sets of **BeyondIndicator**.
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 Indicator** 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 Indicator for Sales Lines regarding available Quantity

This chapter describes how to create an available quantity (item) indicator for sales lines. This has the advantage that in sales lines you immediately get a graphical indication whether the item is available in the desired quantity or, for example, the stock is coming to an end and new items have to be ordered.

Sales Order

101002 · Adatum Corporation

Home Prepare Print/Send Request Approval Order Actions Related Automate Fewer options

General >

Lines Manage Line Order Fewer options

Quantity available	Type	No.	Description	Quant...	Unit of Measure Code	Unit Price Excl. VAT	Line Amount Excl. VAT
→ ✖	Item	1968-S	MEXICO Bürostuhl, schwarz	10	STÜCK	191,00	1.910,00
→ ✔	Item	1928-S	AMSTERDAM Lampe	7	STÜCK	55,20	386,40

Figure: Indicator column in Sales Order

To create an indicator that shows whether the desired item is available in the specified quantity, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Beyond Indicator Setup** and click on the appropriate search result.
3. The **Beyond Indicator Setup** list is displayed. On this page you will find all configured indicators.
4. To create a new indicator, click in a new line in the **ID** column.
5. To set up an indicator for sales lines, enter **37** in the field for **ID**. The information in the **Name** and **Caption** columns will be completed automatically.
6. To activate the indicator, click the checkbox in the **Active** column.
7. In the **Indicator Caption** column, enter a name for the indicator column in the sales document lines. A possible description for the indicator would be **Quantity available in stock**. You have created an indicator. This indicator is already displayed in the sales lines. In order for the lines to display a value in the indicator column, you must define one or more rules for this indicator.

Beyond Indicator Setup

Manage Rules Translations More options

Id ↑	Name	Caption	Active	Indicator Caption
→ 37	Sales Line	Sales Line	<input checked="" type="checkbox"/>	Quantity available in stock

Figure: Setup Indicator for Sales Lines

8. To define one or more rules for the indicator, click **Rules** in the menu bar.
9. The **Edit - Indicator Rules** window is displayed. All defined rules for the selected indicator are displayed here. Two new rules are to be defined for the example:
 - o A red cross (✖) should be displayed in the indicator column if the stock level is smaller than the quantity in the sales line.

- o A green tick (☑) should be displayed in the indicator column if the stock level is greater than or equal to the quantity in the sales line.

10. For the first rule (quantity in sales line < available quantity), set the following:

Type: Field

Value: Quantity

Rule: <

Compare to Type: Field

Compare to Value: Available Quantity

Indicator: ☐

11. For the second rule (quantity in sales line >= available quantity), set the following: **Type:** Field

Value: Quantity

Rule: >=

Compare to Type: Field

Compare to Value: Available Quantity

Indikator: ☐

Edit - Indicator Rules



Manage Move Up Move Down

		Type	Value	Rule	Compare to Type	Compare to Value		Indicator	
→	If	:	Field	Quantity	>=	Field	Available Quantity	then	☑
	else if		Field	Quantity	<	Field	Available Quantity	then	☒

Figure: Indicator Rules for the available Quantity in Sales Lines

You have created the rules for the indicator in the sales line.

NOTE

Freely configurable indicators

You can freely configure the rules and adjust them to your requirements.

To give you more rules for sales lines, we have programmed 3 fields:

- Available Quantity: ID **70839170**
- Drop Shipment Quantity: ID **70839171**
- Special Order Quantity: ID **70839172**

You can store a translation for the indicator column caption so that you can use Beyond Indicator for companies that operate the web client in different languages. For more information, see the chapter [Add Translation for Indicator](#).

Create Indicator for Service Lines regarding available Quantity

This chapter describes how to create an available quantity (item) indicator for service lines.

This has the advantage that in service lines (in the service item worksheet) you immediately get a graphical indication whether the item is available in the desired quantity or, for example, the stock is coming to an end and new items have to be ordered.

The screenshot shows the SAP Service Worksheet interface for 'SI-0000001 Caterpillar 323 - Tier 4F / EU Stage V'. The 'General' tab is active, and the 'Place of Action' is set to 'Lines'. The 'Manage' sub-tab is selected, showing a table of service lines. The table has columns for 'Quantity available in stock', 'Type', 'No.', 'Description', 'Quantity', and 'Unit of Measure Code'. The first three rows show items with red 'X' marks in the 'Quantity available in stock' column, indicating they are not available in the desired quantity. The fourth row shows a resource 'CONRAD' with a quantity of 3.

Quantity available in stock	Type	No.	Description	Quantity	Unit of Measure Code
→ X	Item	1001	BEYOND Cylinder Head Screw	10	PCS
X	Item	1005	BEYOND Gasket	1	PCS
X	Item	1008	BEYOND Piston Ring	4	PCS
	Resource	CONRAD	Conrad Nuber	3	H

Figure: Indicator in Service Worksheet

To create an indicator of the service to the available quantity, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Beyond Indicator Setup** and click on the appropriate search result.
3. The **Beyond Indicator Setup** list is displayed. On this page you will find all configured indicators.
4. To create a new indicator, click in a new row in the **ID** column.
5. To set up an indicator for the service lines, specify **5902** (Service Lines). The information in the **Name** and **Label** columns will be completed automatically.
6. To activate the indicator, click the checkbox in the **Active** column.
7. In the **Indicator Caption** column, enter a name for the indicator column in the service worksheet lines. A possible description for the indicator would be **Quantity available in stock**. You have created an indicator. This indicator is already displayed in the service worksheet lines. In order for the lines to display a value in the indicator column, you must define one or more rules for this indicator.

Beyond Indicator Setup ✓ Saved 🔖 📄 ↗

Manage 🔗 Rules 🗨 Translations | More options 🔗 🔍

	Id ↑	Name	Caption	Active	Indicator Caption
→	5902	Service Line	Service Line	<input checked="" type="checkbox"/>	Quantity available in stock

Figure: Setup Indicator for Service Item Worksheet (Worksheet)

8. To define one or more rules for the indicator, click **Rules** in the menu bar.
9. The **Edit - Indicator Rules** window is displayed. All defined rules for the selected indicator are displayed here. Two new rules are to be defined for the example:
 - In the indicator column, a red cross (❌) should be displayed if the stock level is smaller than the quantity in the line.
 - In the indicator column, a green tick (✅) should be displayed if the stock level is greater than or equal to the quantity in the line.
10. Set the following for the first rule (Quantity in Service Lines > Available Quantity):

Type: Field
Value: Quantity
Rule: >
Compare with Type: Field
Compare with Value: Available Quantity
Indicator: ❌
11. Set the following for the second rule (Quantity in Service Lines <= Available Quantity):

Type: Field
Value: Quantity
Rule: <=
Compare with Type: Field
Compare with Value: Available Quantity
Indikator: ✅

Edit - Indicator Rules ↗ ✕

Manage ↑ Move Up ↓ Move Down 🔗

		Type	Value	Rule	Compare to Type	Compare to Value	Indicator
→	If	Field	Quantity	>	Field	Available Quantity	then ❌
	else if	Field	Quantity	<=	Field	Available Quantity	then ✅

Figure: Indicator Rules for available Quantity in Service Lines

You have created the rules for the indicator column in the line of the service item worksheet (work sheet).

NOTE

Freely configurable indicators

You can freely configure the rules and adjust them to your requirements.

In order to facilitate the configuration for lines of the service item worksheet (service worksheet), we have programmed the following field:

- Available Quantity: ID **70839170**

You can store a translation for the indicator caption so that you can use Beyond Indicator for companies that operate the

Webclient in different languages. For more information, see the chapter [Add Translation for Indicator](#).

Add translations for Indicator

This chapter describes how to add a translation for an indicator so that you can use BEYOND Indicator in companies that use the web client in multiple languages.

To add a translation to an indicator, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Beyond Indicator Setup** and click on the appropriate search result.
3. The **Beyond Indicator Setup** list is displayed. On this page you will find all configured indicators.
4. From the displayed list, select the indicator for which you want to add a translation.
5. In the menu bar, click **Translations**.
6. The **Edit - Translations** window is displayed.

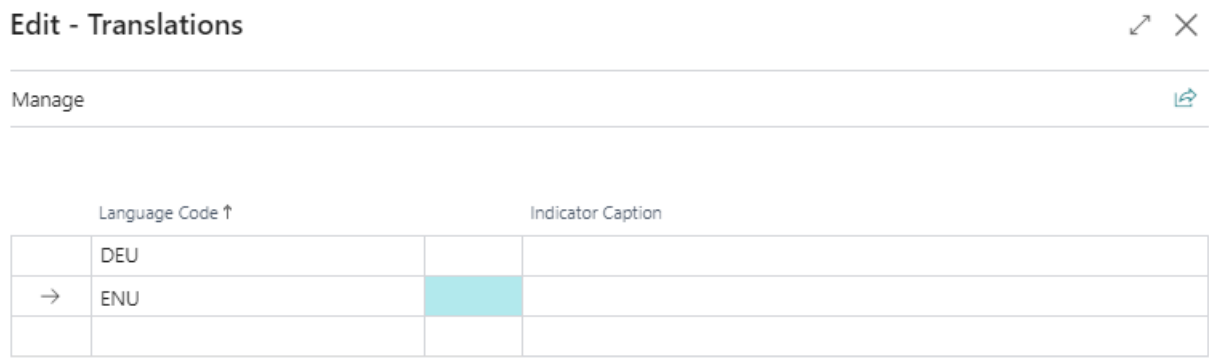


Figure: Add Translation for an Indicator

7. In the **Language Code** column, specify the language for which you want to add a translation.
8. In the **Indicator Caption** column, specify the translation for the indicator.

You have added one or more translations for the indicator. The label set for the indicator column is used in the documents.