BEYOND
REPORTS

User Guide

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Table of Contents

BEYOND Reports

About This Extension

BEYOND Reports is an extension for Microsoft Dynamics 365 Business Central.
It is developed by:

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BEYOND Reports enables you to quickly and easily design reports in Business Central. The solution allows you to customize a given basic design in a very short time and extend it with various elements and information:

- Implement specific report change requests such as a digital “stationery” (with report header, footer, and watermark) with just a few clicks.
- Change the field captions in a report such as “Sales Quote” to “Quote” in less than a minute - without re-logging or any programming.
- Display deafult fields and select from three possible positions where and in which order they should be printed in the report.
- Add a barcode to your report so that you can match it by scanning it when needed.
- Enhance the report with pre and post-texts, HTML text, and free text to customize the reports the way you need them.
- Use placeholders (customizable per language) to include values from header fields in free texts.

> **NOTE**
>
> For more information on the configuration options with BEYOND Reports, please refer to the Configure Reports chapter.

Supported Reports

The basic design of BEYOND Reports allows customization of the following reports:

Sales	Purchase	Service	Reminders
Sales Quote	Purchase Quote	Service Quote	Issued Reminders
Sales Order	Purchase Order	Service Order	Reminders
Sales Shipment	Purchase Shipment	Service Item Worksheet	
Sales Invoice	Purchase Invoice	Service Shipment	
Sales Credit Memo	Purchase Credit Memo	Service Invoice	
Blanket Sales Order	Blanket Purchase Order	Service Credit Memo	
Sales Return Order	Purchase Return Order	Service Warranty Claim	
Sales Return Receipt	Purchase Return Shipment		
Pro Forma Invoice			

The latest version of this documentation can be found at the following link: BEYOND Reports Documentation.

Documentation Information

Version	Date	Autor	Comment
1.0	10.07.2022	Jannic Weidel	Initial (English) Version of the documentation
1.1	14.06.2022	Jannic Weidel	Added new chapters to the documentation
1.2	15.05.2023	Jannic Weidel	Added Chapter for assigning permission sets
1.3	16.01.2024	Jannic Weidel	Added Chapter to copy report configuration to other report templates
Document Access		public	

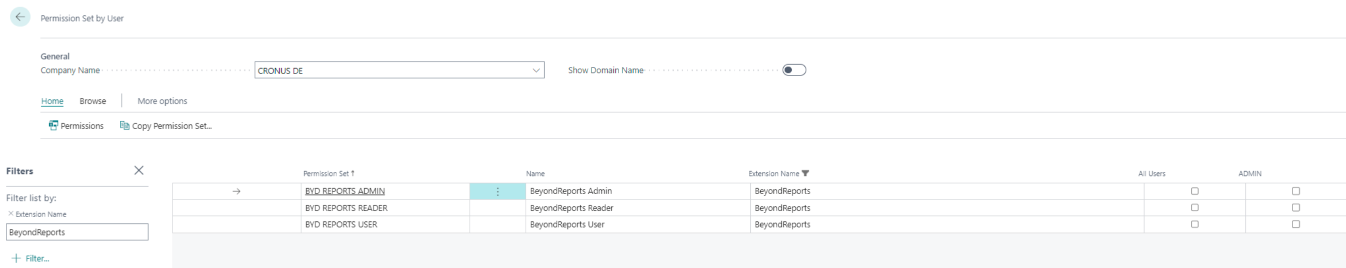
Assign User Permissions

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

Permission Set	Description
BYD REPORTS ADMIN	• Activate BEYOND Reports License • Setup BEYOND Reports • Define custom field captions • Define custom report names • Create and edit placeholders for reports • Create and edit HTML texts • Create and edit HTML text templates • Add and move fields in reports • Create reports with BEYOND Reports
BYD REPORTS USER	• Create and edit HTML texts • Create and edit HTML text templates • Create reports with BEYOND Reports
BYD REPORTS READER	• Create reports with BEYOND Reports (no permissions for the above mentioned features and options)

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



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

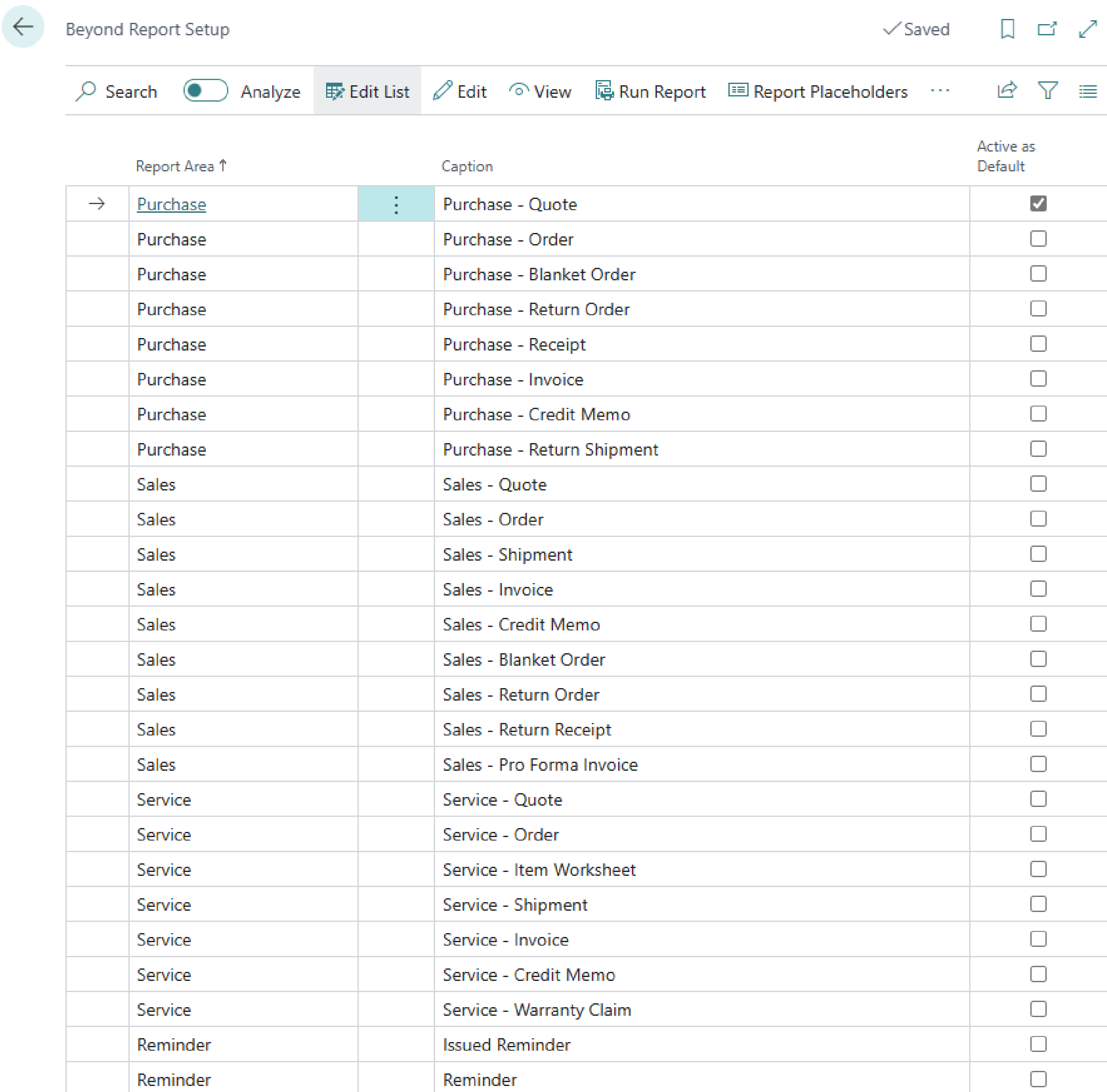
Setup Wizard

This chapter explains how to set up BEYOND Reports for the first time. BEYOND Reports includes a setup wizard to help you set up the reports.

> **NOTE**
>
> **General Setup**
> The setup wizard is used for the **first time** setup of reports with BEYOND Reports. If you use the setup wizard again at a later time and complete the setup with new values, all set reports will be overwritten with the new print settings you defined.

To set up BEYOND Reports for the first time, proceed as follows:

1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) □.
3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.

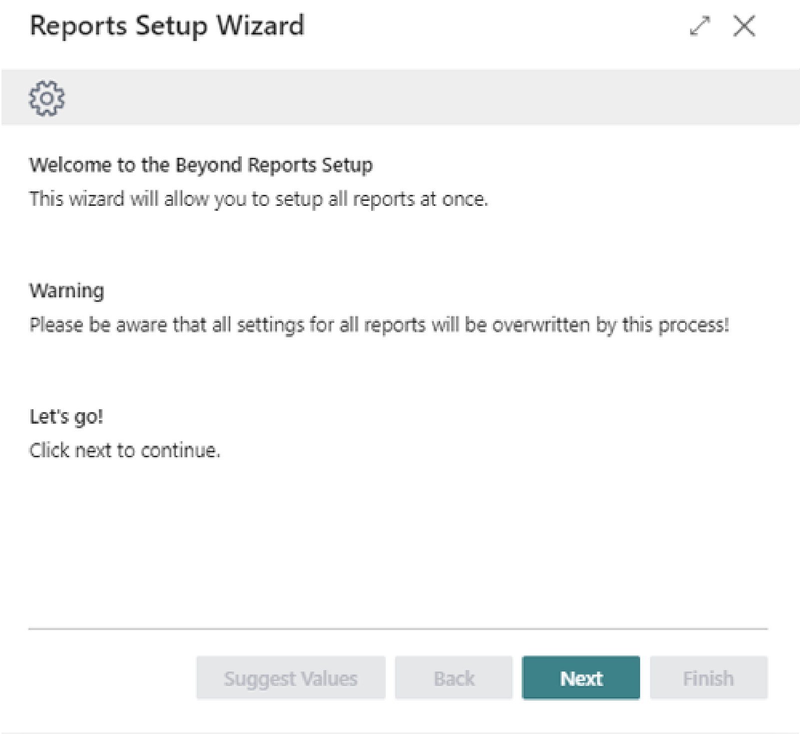


Beyond Report Setup ✓Saved

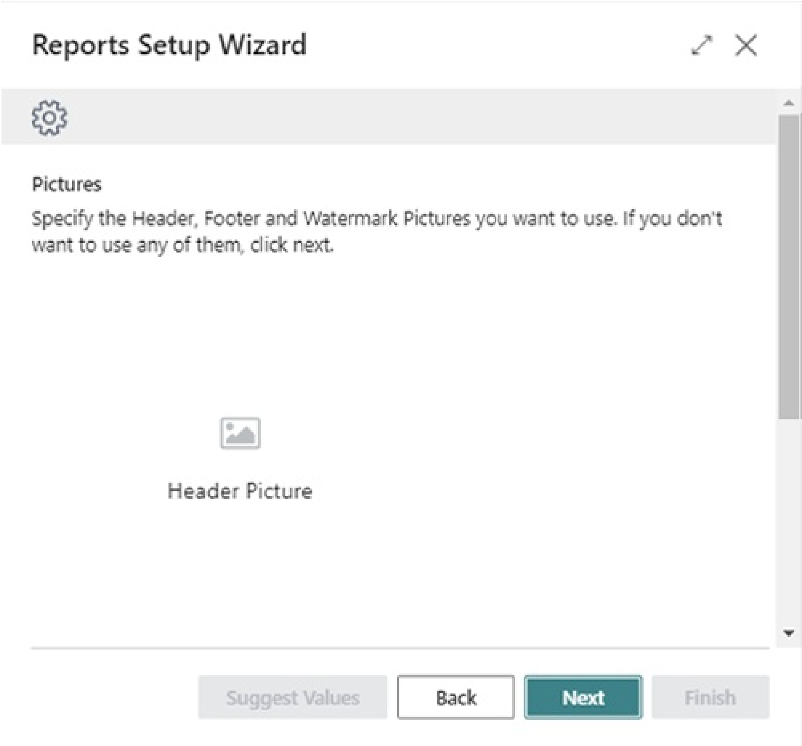
Search | Analyze | Edit List | Edit | View | Run Report | Report Placeholders | ···

	Report Area ↑	Caption	Active as Default
→	Purchase	Purchase - Quote	☑
	Purchase	Purchase - Order	☐
	Purchase	Purchase - Blanket Order	☐
	Purchase	Purchase - Return Order	☐
	Purchase	Purchase - Receipt	☐
	Purchase	Purchase - Invoice	☐
	Purchase	Purchase - Credit Memo	☐
	Purchase	Purchase - Return Shipment	☐
	Sales	Sales - Quote	☐
	Sales	Sales - Order	☐
	Sales	Sales - Shipment	☐
	Sales	Sales - Invoice	☐
	Sales	Sales - Credit Memo	☐
	Sales	Sales - Blanket Order	☐
	Sales	Sales - Return Order	☐
	Sales	Sales - Return Receipt	☐
	Sales	Sales - Pro Forma Invoice	☐
	Service	Service - Quote	☐
	Service	Service - Order	☐
	Service	Service - Item Worksheet	☐
	Service	Service - Shipment	☐
	Service	Service - Invoice	☐
	Service	Service - Credit Memo	☐
	Service	Service - Warranty Claim	☐
	Reminder	Issued Reminder	☐
	Reminder	Reminder	☐

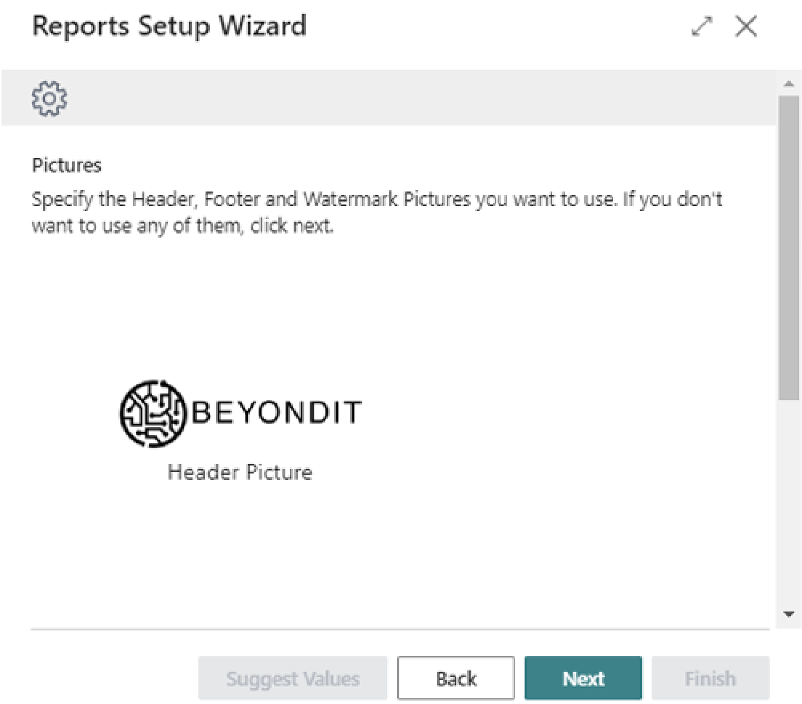
4. To open the setup wizard for BEYOND Reports, click **Reports Setup Wizard** in the menu bar.
5. The **Reports Setup Wizard** is displayed.



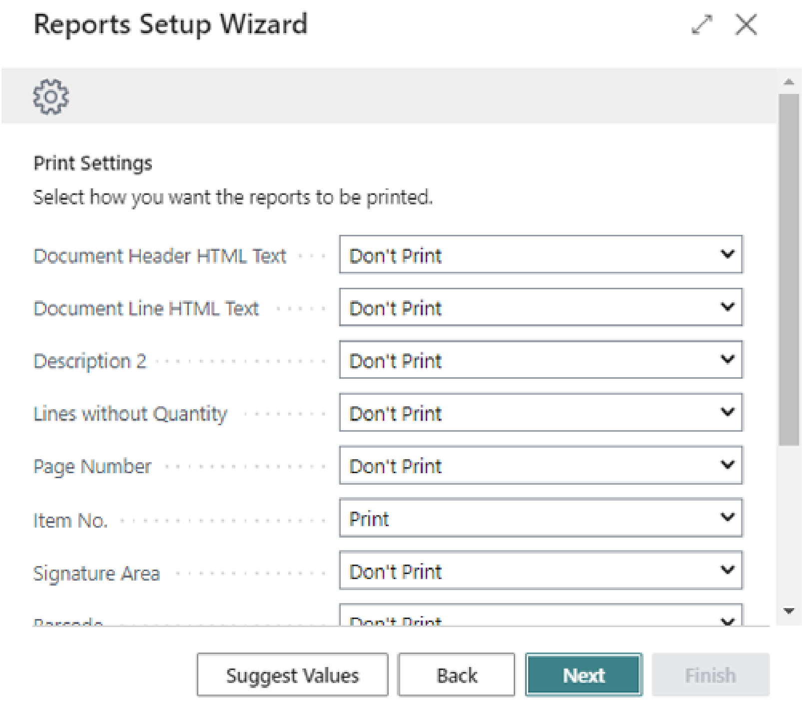
6. To start the basic settings and design of your report, click **Next**.
7. In the next step you can upload pictures for the headers, footers and background (watermark) of your reports.



8. To upload a picture, click on the corresponding icon and specify the path to the picture. We recommend using the following dimensions and specifications for the pictures:
   Header Picture – 2480×531 px, PNG file with transparent background
   Footer Picture – 2480×531 px, PNG file with transparent background
   Watermark – 800×800 px, JPEG or PNG file (only grayscale)



9. The uploaded pictures can be edited and customized later. To proceed to the next step, click **Next**. In this step of the Report Setup Wizard, you set the print settings for the report.



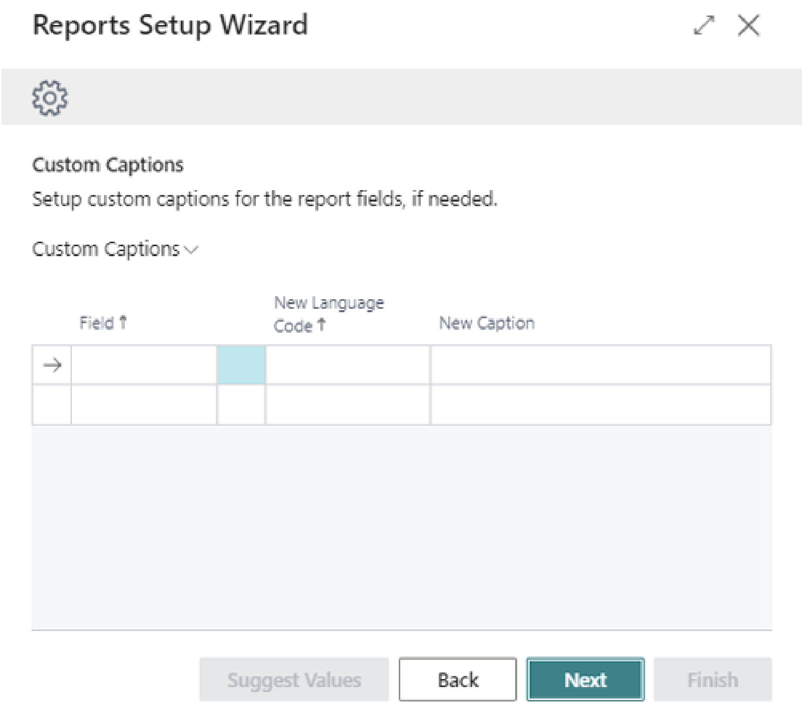
10. To automatically apply a default setup for the print settings, click the **Suggest Values** option.

11. The following options are available for manual and individual report print settings:

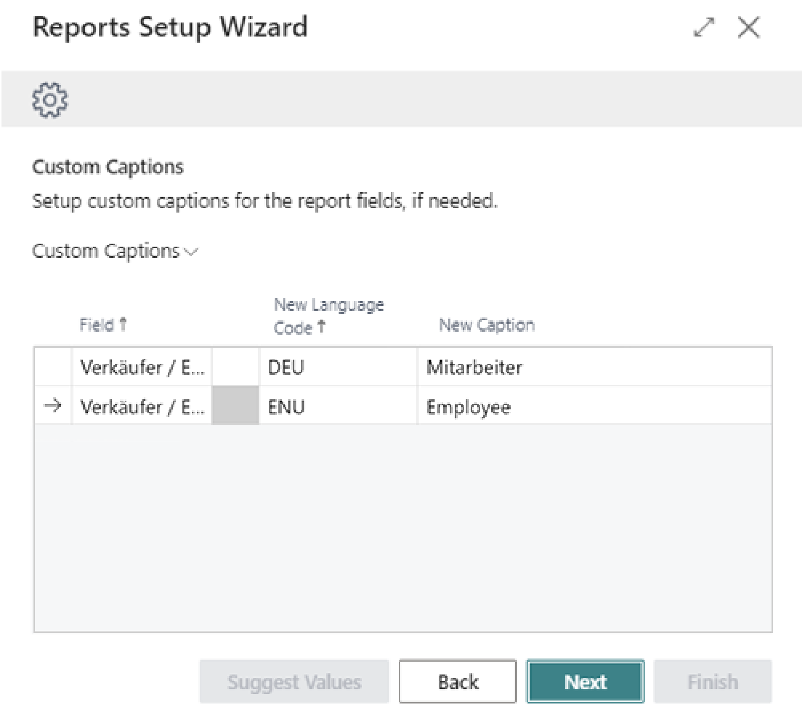
Option	Description
Document Header HTML Text	**Don't Print**: Select this option if you don't want to print HTML texts in the report header. **Print**: Select this option if you want to print HTML texts in the report header.
Document Line HTML Text	**Don't Print**: Select this option if you don't want to print HTML texts for lines. **Print**: Select this option if you want to print HTML texts for lines.
Description 2	**Don't Print**: Select this option if you don't want to print the value of the **Description 2** header field in the reports. **Print**: Select this option if you want to print the value of the **Description 2** header field in the reports. **Print as new Line**: Select this option if you want to print the value of the **Description 2** header field in the reports in a new line.
Lines without Quantity	**Don't Print**: Select this option if you want to not print lines with the quantity **0** in the reports. **Print**: Select this option if you want to print lines in reports which have a value of **0** for the **Quantity** field.

Option	Description
Page Number	**Don't Print**: Select this option if you don't want to print page numbers in reports. **Print Top**: Select this option if you want to print page numbers at the top of the reports. **Print Bottom**: Select this option if you want to print page number at the bottom of the reports.
Item No.	**Print**: Select this option if you want to print item numbers (of your ERP system) in the reports. **Print Vendor Item No.**: Select this option if you want to print the item numbers of the vendor in your reports.
Signature Area	**Don't Print**: Select this option if you don't want to print a signature area in the reports. **Print**: Select this option if you want to print two signature areas in the report (for both your employee and the vendor/customer). **Print Customer / Vendor**: Select this option if you want to print a signature area (only for the Customer/ Vendor) in the report. **Print Employee**: Select this option if you want to print a signature area (for the employee) in the report.
Barcode	**Don't Print**: Select this option if you **don't** want to print a barcode in the reports. **Print**: Select this option if you want to print a barcode in the reports. The document number will be encripted in the barcode.
Position No.	**Don't Print**: Select this option if you don't want to print a position number in the reports. **Print**: Select this option if you want to print a position number in the reports.
Increase Position No.	This option is used to define the increment of the position number. The value is set to **1** by default.
Font	This option allows you to define the default font used in reports. The value is set to **Arial** bby default.
Font Size	This option allows you to define the font size used in the reports. The value is set to **8** by default.

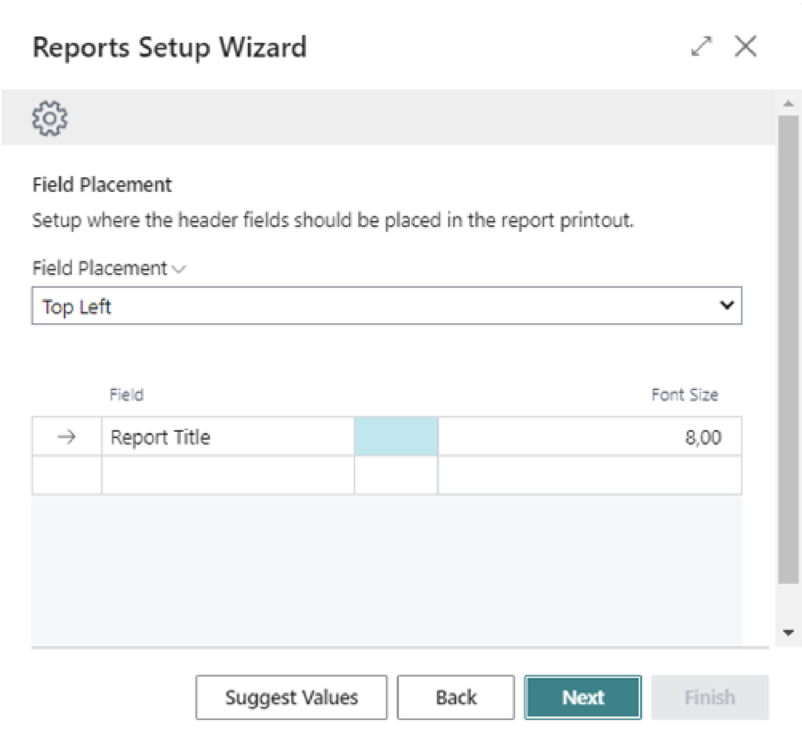
12. Click **Next** to save the print settings. In the next step you can define individual captions for your reports.



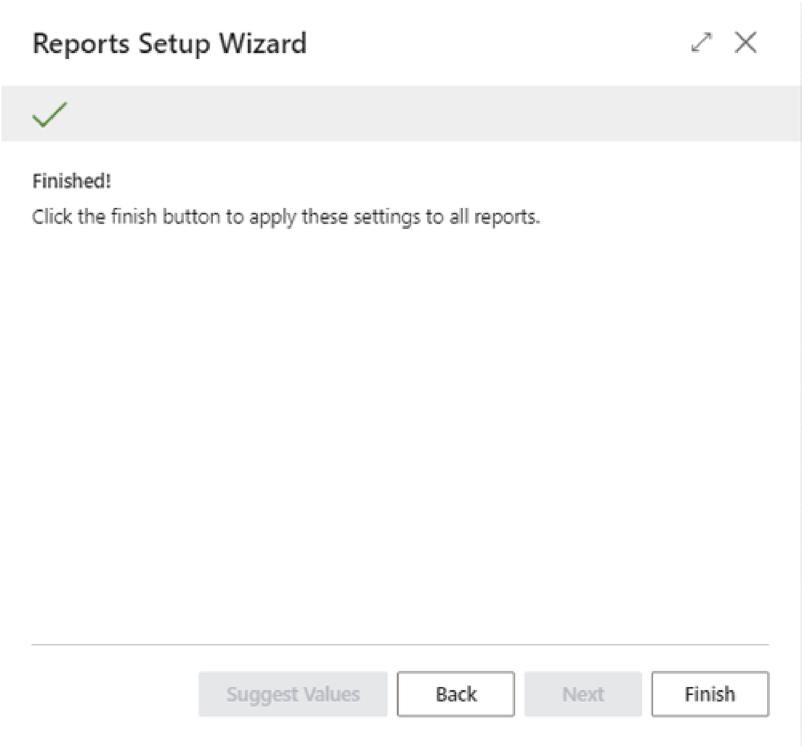
13. To set up a custom field caption for your reports, expand the dropdown list under the **Field** column. For example, you can use this function to change the field caption for the **Salesperson/Purchaser** field to **Employee**.
14. Select the corresponding field caption from the **Field** column dropdown list and add the language in the **New Language Code** column. Enter the new caption to be used in your reports in the **New Caption** field.



15. To proceed to the next step, click **Next**. In this step you can define a general setting for displaying additional information and its placement in your reports.



16. For your reports, you can display or print additional fields and their values in 3 areas. Select the area from the **Field Placement** dropdown list and specify which field should be displayed. If you prefer a setup with a default setting, you can also click the **Suggest Values** button.
17. To proceed to the next step, click **Next**.



18. To complete the setup of BEYOND Reports, click **Finish**.

When you complete the setup wizard, you set up all reports at once. For example, if you want to make an individual change in a report (for example, change the field caption only for a specific report) you must set up this print setting on the report card.

See the Configure Reports section for more information about what print settings are available and what effect they have on a report.

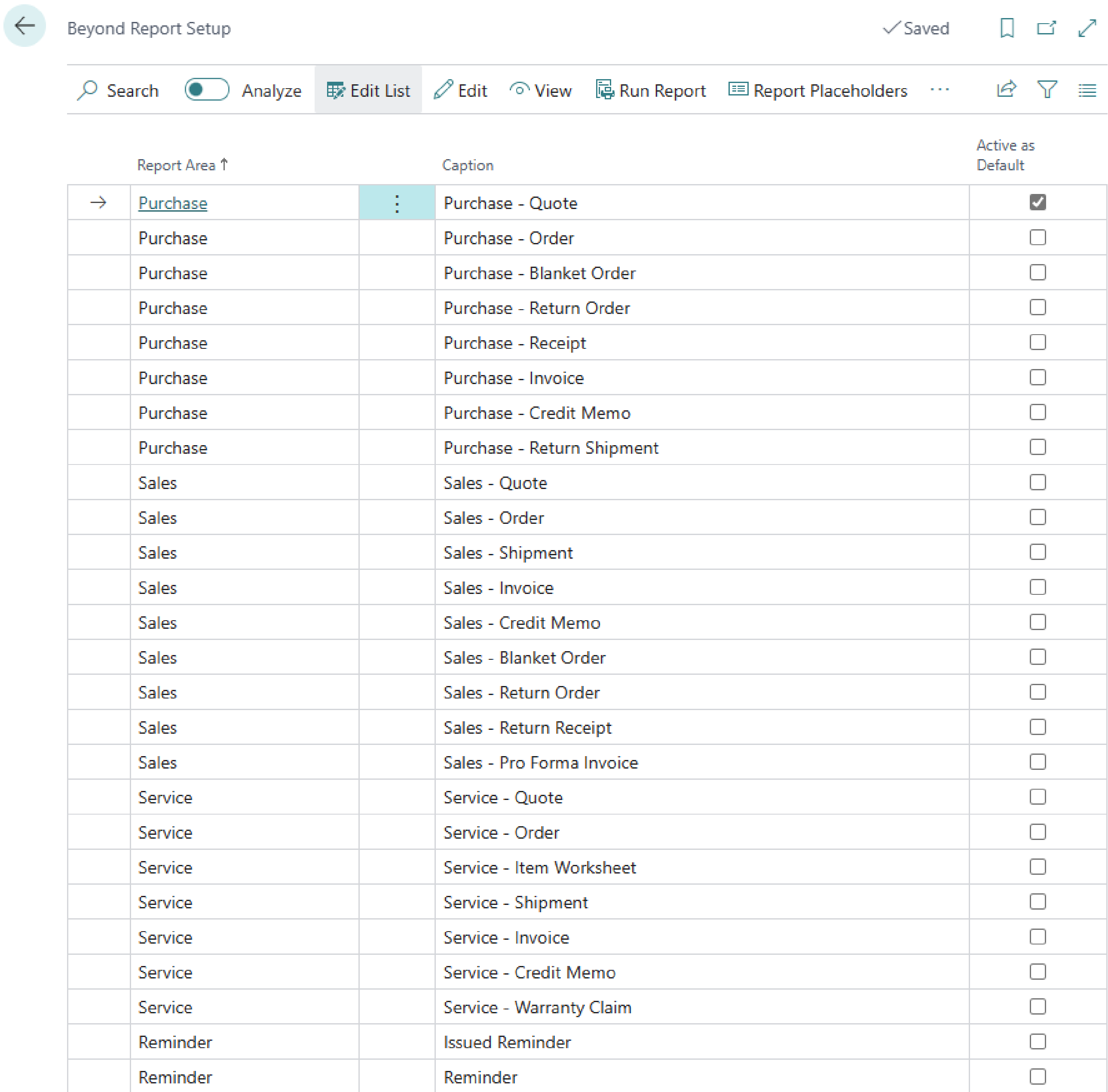
Next Chapter

Copy Report Settings to another Template

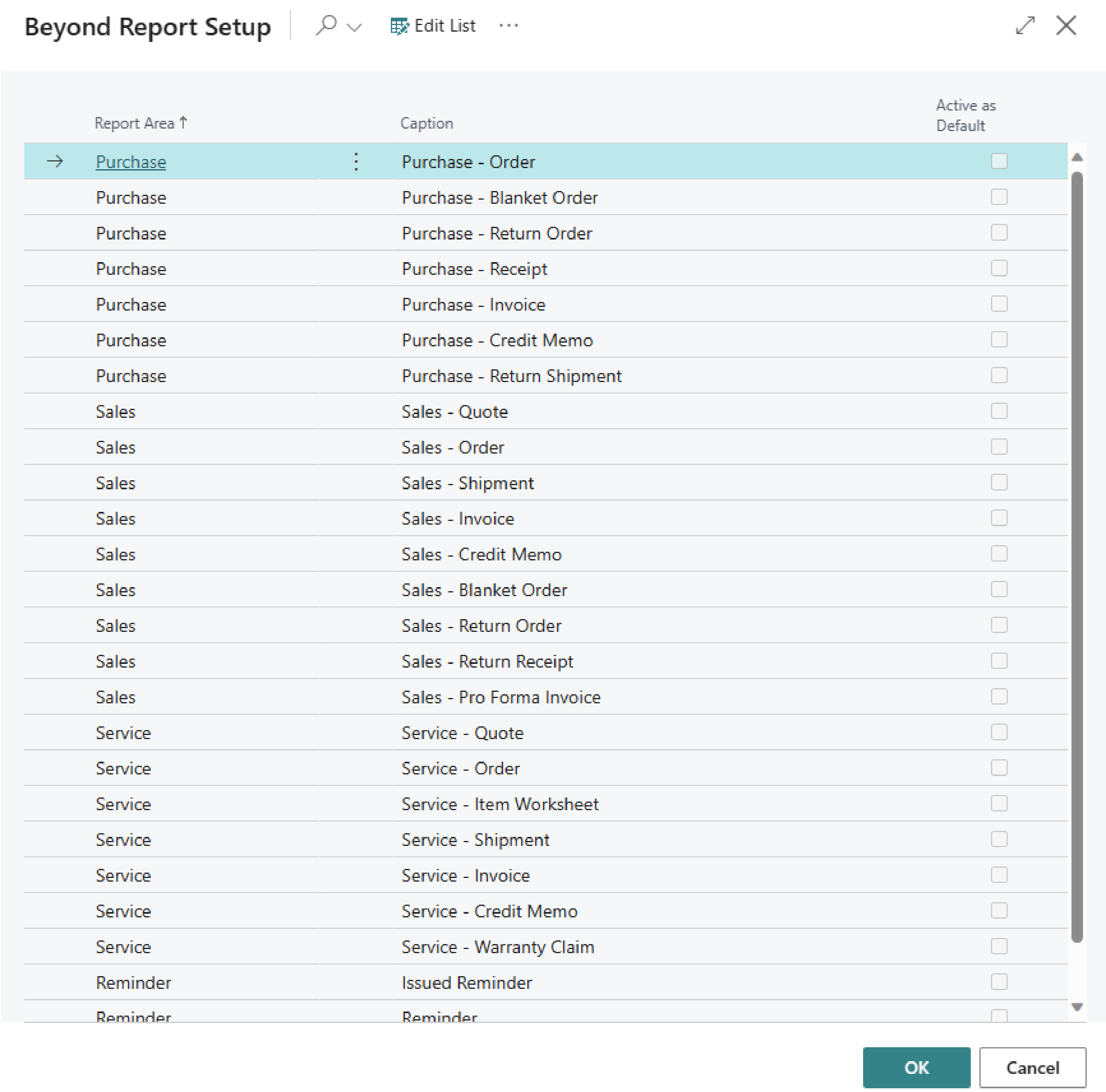
This chapter describes how you can transfer the configuration of a report that has already been set up for **Beyond Reports** to another report template. This has the advantage that you do not have to go through the setup wizard again.

To transfer existing settings to another report template of **Beyond Reports**, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Beyond Reports Setup** and click on the corresponding search result.
3. The **Beyond Reports Setup** page is displayed.



4. Select a report template that has already been set up.
5. Expand the options in the menu bar by clicking on the ellipsis (**...**).
6. Select the **Copy Report Setup to...** option in the menu bar.
7. The **Beyond Reports Setup** window is displayed.



8. From the list displayed, select the reports for which the settings are to be applied.
9. Click **OK**.
10. The configuration is applied to the selected report templates. At the same time, the **Active As Default** checkbox is activated for the templates.

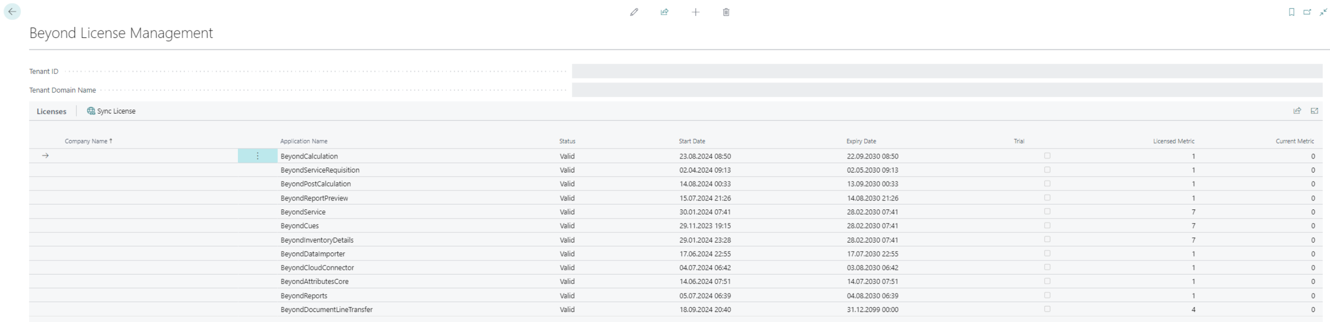
You have transferred the configuration of a report template to other report templates.

License Management

This chapter describes how you can view the license management of **Beyond Reports**.

To view the status of the product license for **Beyond Reports**, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Beyond License Management**.
2. The **Beyond License Management** page is displayed.



Beyond License Management

Tenant ID

Tenant Domain Name

Licenses | Sync License

Company Name	Application Name	Status	Start Date	Expiry Date	Trial	Licensed Metric	Current Metric
	BeyondCalculation	Valid	23.08.2024 08:50	22.09.2030 08:50		1	0
	BeyondServiceRequisition	Valid	02.04.2024 09:13	02.05.2030 09:13		1	0
	BeyondPostCalculation	Valid	14.08.2024 00:33	13.09.2030 00:33		1	0
	BeyondReportPreview	Valid	15.07.2024 21:26	14.08.2030 21:26		1	0
	BeyondService	Valid	30.01.2024 07:41	28.02.2030 07:41		7	0
	BeyondCues	Valid	29.11.2023 19:15	28.02.2030 07:41		7	0
	BeyondInventoryDetails	Valid	29.01.2024 23:28	28.02.2030 07:41		7	0
	BeyondDataImporter	Valid	17.06.2024 22:55	17.07.2030 22:55		1	0
	BeyondCloudConnector	Valid	04.07.2024 06:42	03.08.2030 06:42		1	0
	BeyondAttributesCore	Valid	14.06.2024 07:51	14.07.2030 07:51		1	0
	BeyondReports	Valid	05.07.2024 06:39	04.08.2030 06:39		1	0
	BeyondDocumentLineTransfer	Valid	18.09.2024 20:40	31.12.2099 00:00		4	0

3. Under the **Licenses** section, you will find all product licenses for BeyondIT applications that have been installed for this company. You can read all the necessary information from the values in the columns:

Column	Description
Company Name	This column indicates the name of the company.
Application Name	This column indicates the name of the application. If you use several BeyondIT products, a separate line is displayed for each product in the overview,
Status	This is the status of the product license. Several values are possible: **Valid**: The product license is valid and the application can be used without restrictions. **Expired**: The product license has expired. The application can no longer be used. **Trial**: The product license is valid and the functionalities of the application can be used for a short period of time (note the value in the **expiry date** column) with restrictions or without restrictions. **Exceeded**: The product license has expired. The application can no longer be used.
Start Date	This is the date on which the product license was registered.
Expiry Date	This is the date on which the product license becomes or became invalid. The application can no longer be used.
Trial	This checkbox indicates whether the product license is a trial license. Trial licenses are very limited licenses. You can purchase a full product license after the trial license expires (note the value in the **Expiry date** column).
Licensed Metric	This column shows how the application was licensed. For example, this can be a tenant license, a license per company or a license per user.
Current Metric	This column shows how many licenses are used in the environment. The difference between the values in the **Licensed metric** and **Current metric** columns indicates whether you need to purchase an additional license.

Configure Reports

This chapter describes how to set up reports in BEYOND Reports and what options are available for the print settings. It explains what effects the print settings have on the report.

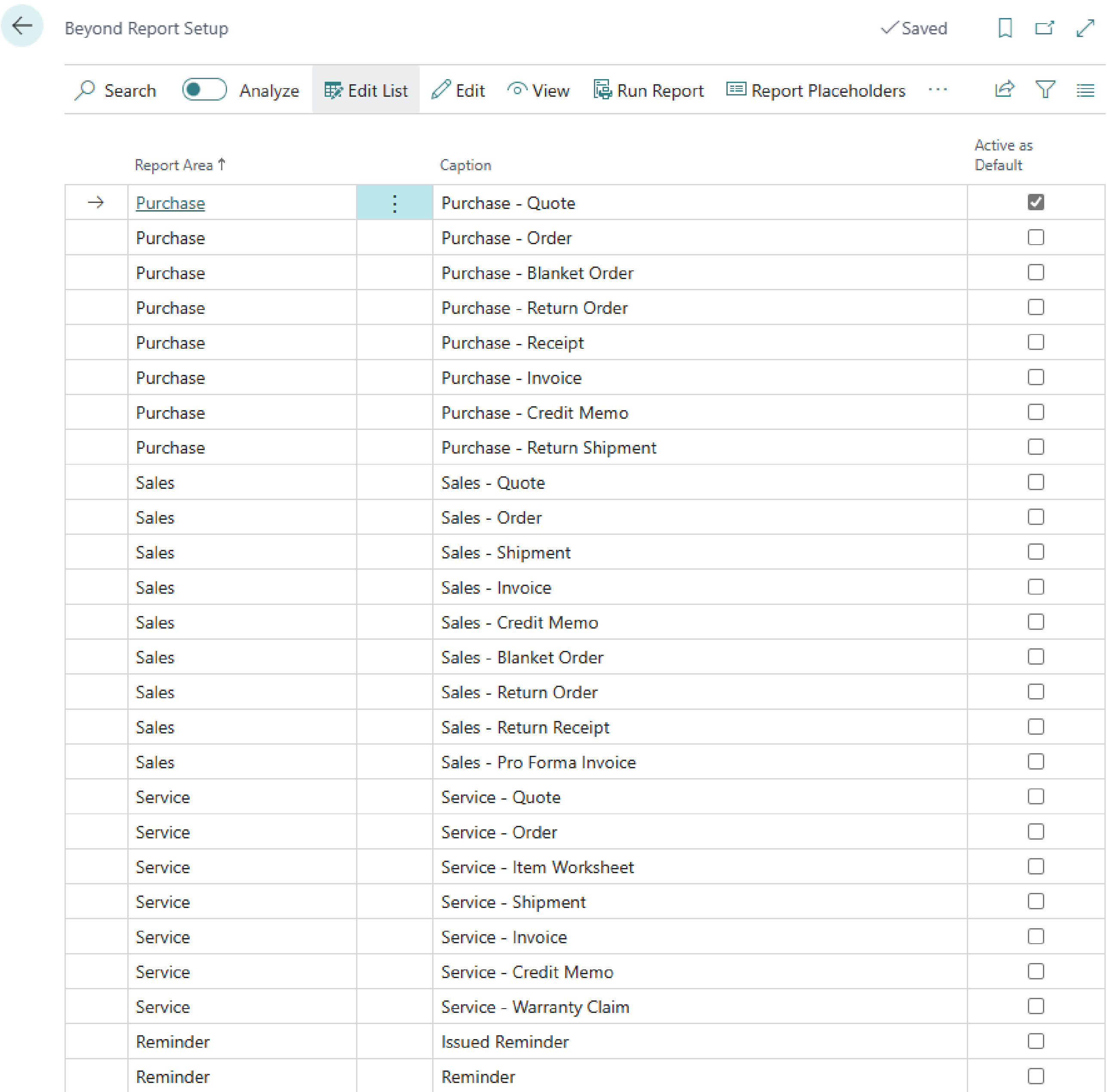
The contents in this chapter are divided into the following sections:

Setup Header Picture

This section describes how to set up a header picture for a report in BEYOND Reports. If you used the Setup Wizard during the initial setup of BEYOND Reports, a header picture may already be set up. You can proceed as described below to change or customize the header picture for the selected report.

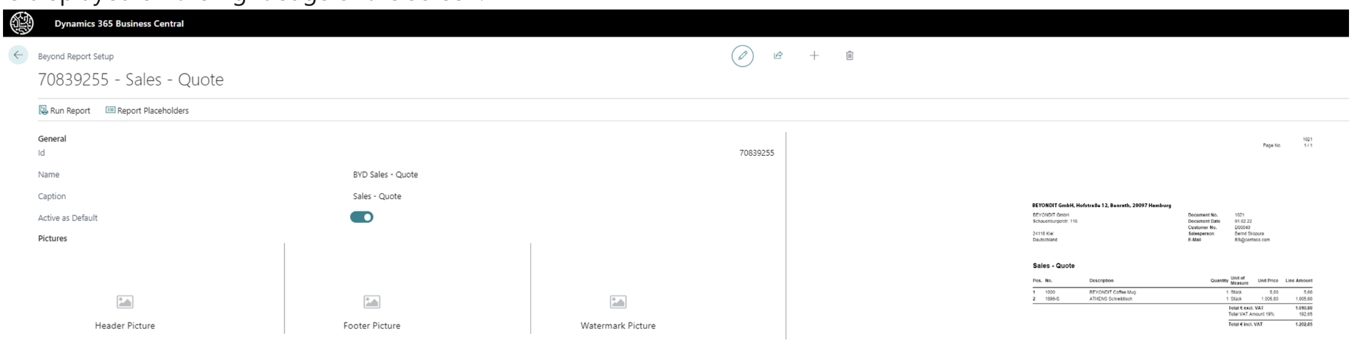
To set up a header picture for a report, do the following:

1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) .
3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.

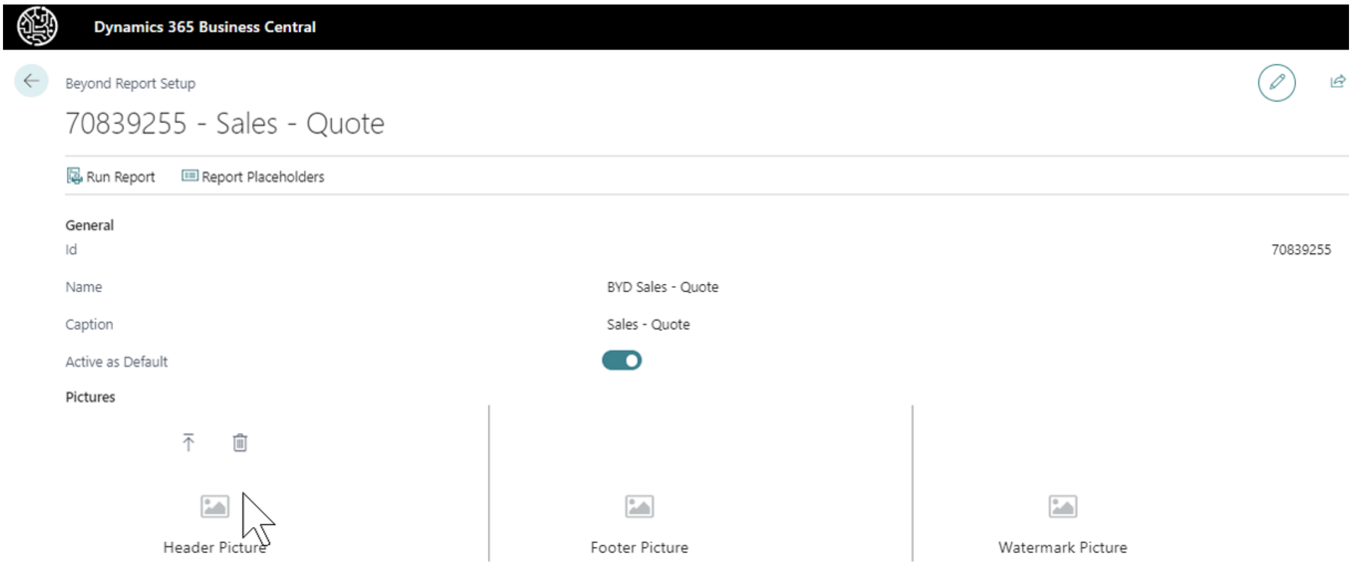


Report Area ↑	Caption	Active as Default
Purchase	Purchase - Quote	☑
Purchase	Purchase - Order	☐
Purchase	Purchase - Blanket Order	☐
Purchase	Purchase - Return Order	☐
Purchase	Purchase - Receipt	☐
Purchase	Purchase - Invoice	☐
Purchase	Purchase - Credit Memo	☐
Purchase	Purchase - Return Shipment	☐
Sales	Sales - Quote	☐
Sales	Sales - Order	☐
Sales	Sales - Shipment	☐
Sales	Sales - Invoice	☐
Sales	Sales - Credit Memo	☐
Sales	Sales - Blanket Order	☐
Sales	Sales - Return Order	☐
Sales	Sales - Return Receipt	☐
Sales	Sales - Pro Forma Invoice	☐
Service	Service - Quote	☐
Service	Service - Order	☐
Service	Service - Item Worksheet	☐
Service	Service - Shipment	☐
Service	Service - Invoice	☐
Service	Service - Credit Memo	☐
Service	Service - Warranty Claim	☐
Reminder	Issued Reminder	☐
Reminder	Reminder	☐

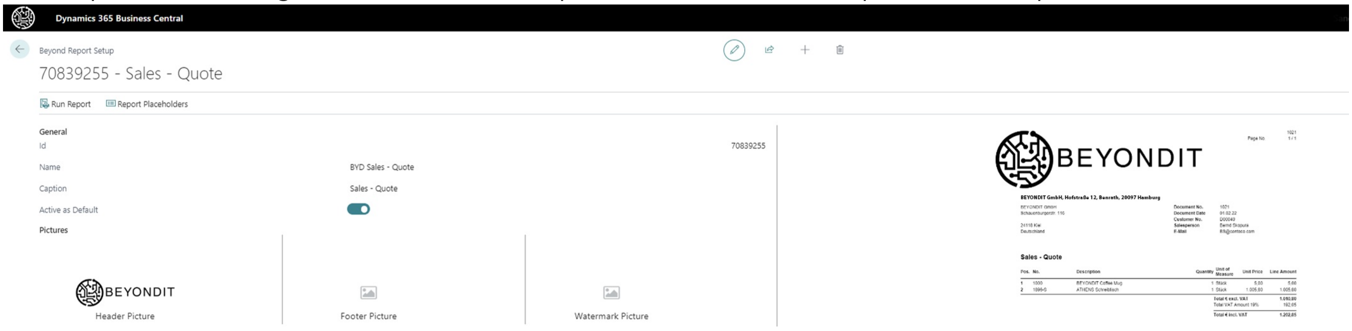
4. To change the header picture for a specific report, click on the value under the **Report Area** column in the displayed list. For the following description of the print settings, we have selected the **Sales - Quote** report card.
5. The report card is displayed. On the left side of the screen you will find the print settings for the report. A report preview is displayed on the right edge of the screen.



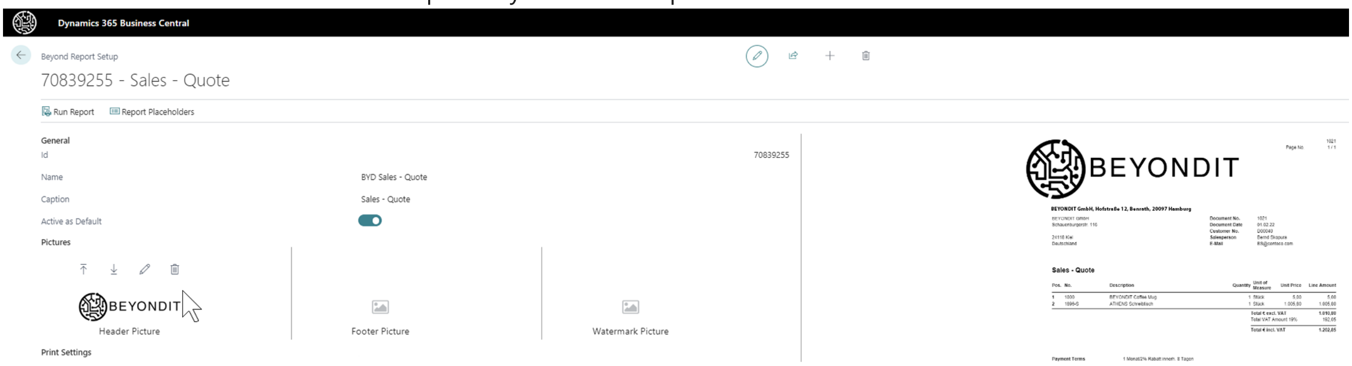
6. In the **Pictures** area, move the mouse pointer to the **Header Picture** icon. If a picture is set up for the report, it will be displayed in the **Pictures** area above the corresponding text in a reduced view.



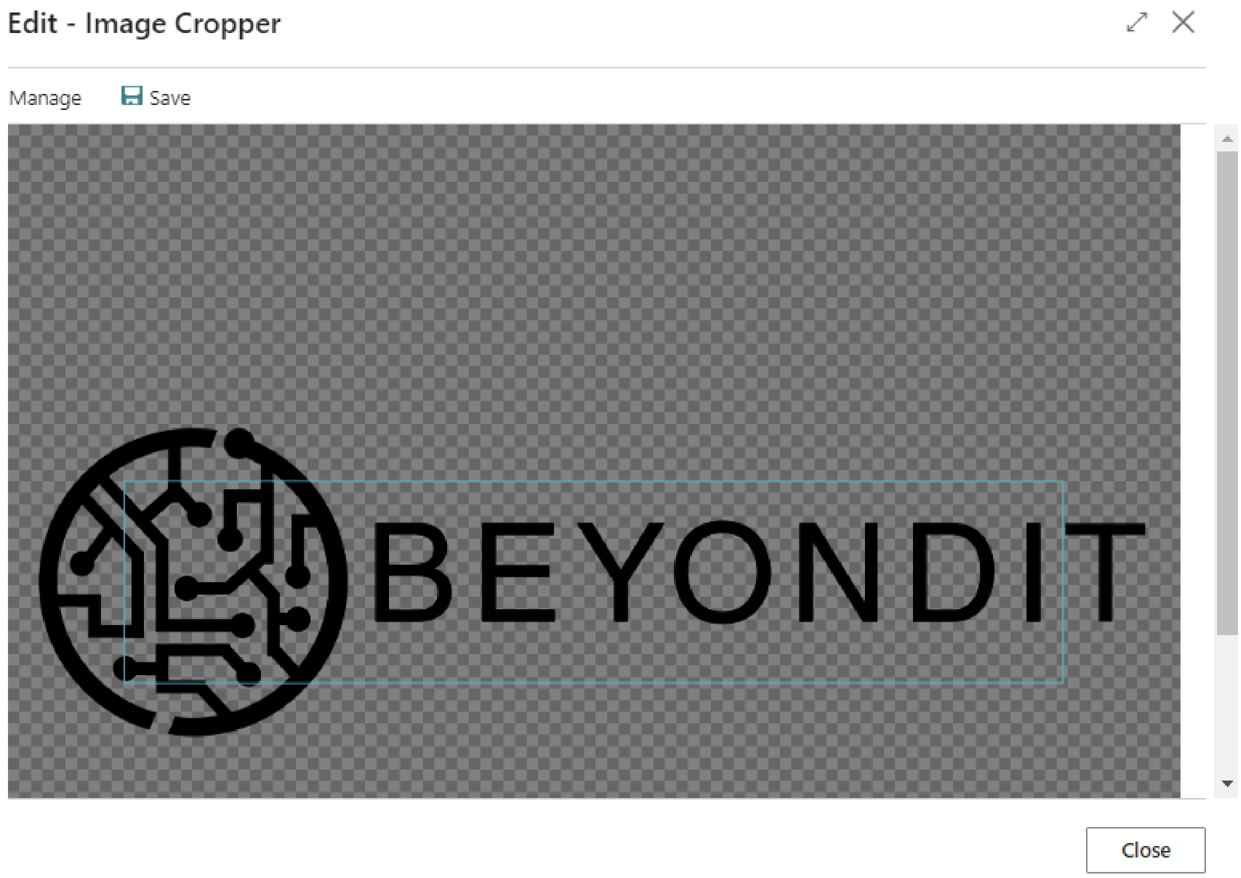
7. In the options menu for the header picture, click the **Upload** icon .
8. The file explorer is displayed. Specify the path to the header picture and select the appropriate picture. Observe the following given specifications:
   Size: 2480×531 px
   File Type: PNG file
   Features: transparent background (if possible)
9. Upload the picture file. The uploaded picture is displayed in a reduced size under the **Pictures** section. At the same time, the live preview on the right side of the screen is updated to show the header picture in the report.



   You have set the header picture for the selected report. Note that this change is only applied to the selected report. If you want to change the size and placement of the header picture you can do so using the additional header picture menu options.
10. Move the mouse cursor to the header picture you have set up in the **Pictures** > **Header Picture** area.



11. Click the **pen** icon .
12. The **Edit – Image Cropper** window is displayed.



13. While holding down the CTRL key, scroll the mouse wheel to enlarge or reduce the picture size.
14. Hold down the left mouse button to move the picture in the display area (blue rectangle: 2480×531 px).

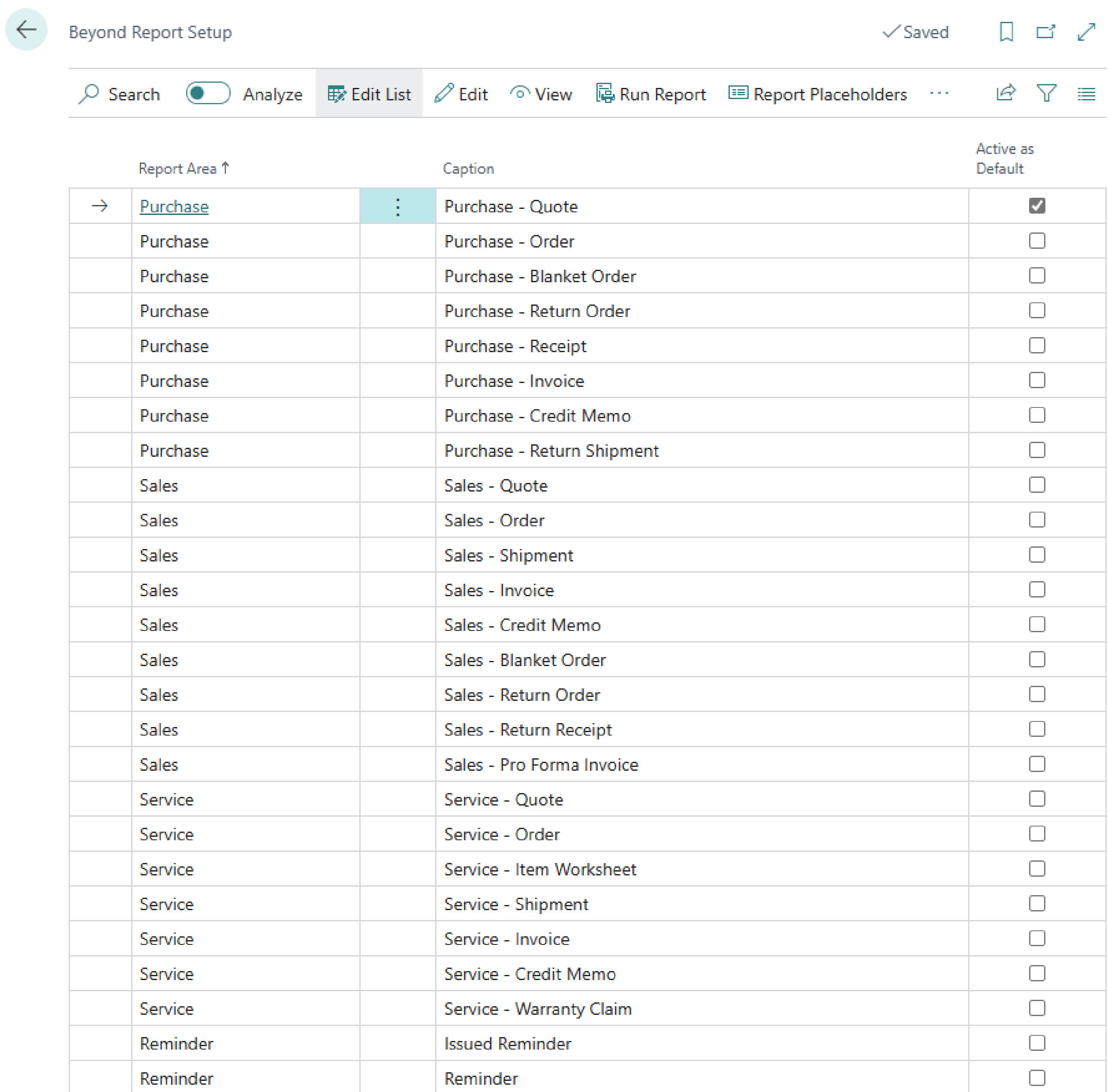
To save the picture and use it in the report, click **Save** in the menu bar. The preview of the report is updated.

Setup Footer Picture

This section describes how to set up a footer picture for a report in BEYOND Reports. If you used the Setup Wizard during the initial setup of BEYOND Reports, a footer picture may already be set up. You can follow the instructions below to change or customize the footer picture for the selected report.

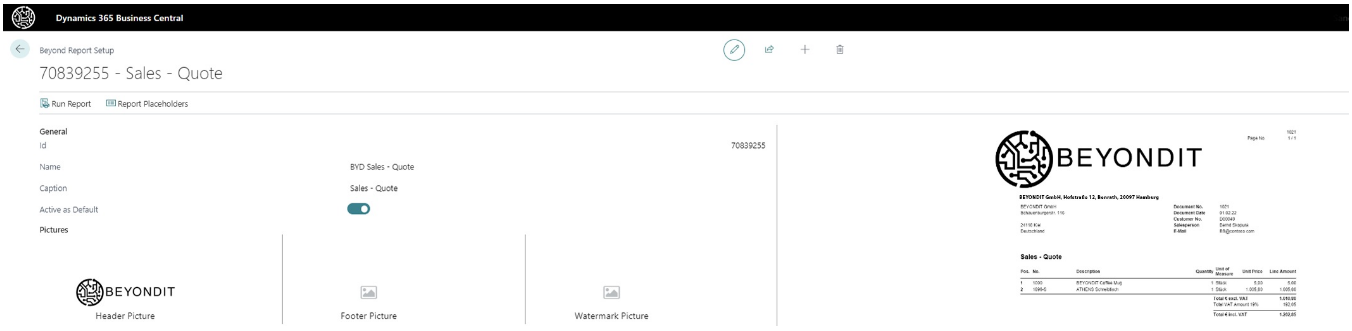
To set up a footer picture for a report, proceed as follows:

1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) □.
3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.

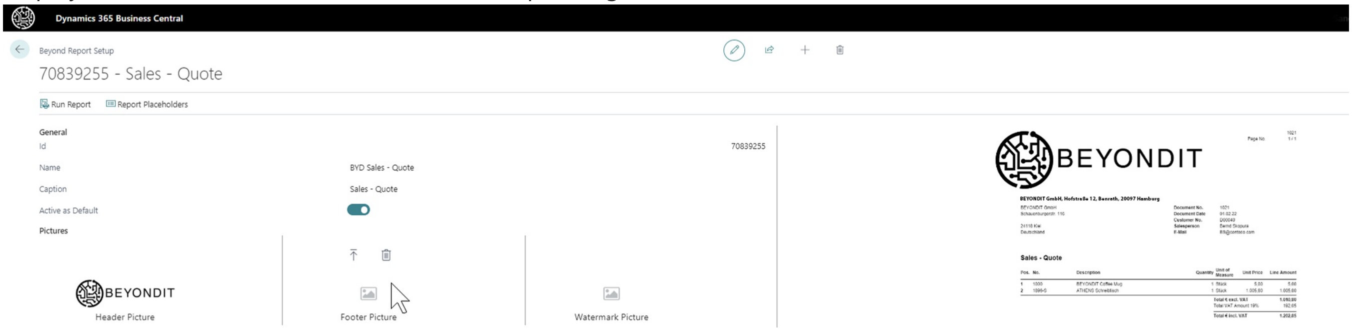


Report Area ↑	Caption	Active as Default
Purchase	Purchase - Quote	☑
Purchase	Purchase - Order	☐
Purchase	Purchase - Blanket Order	☐
Purchase	Purchase - Return Order	☐
Purchase	Purchase - Receipt	☐
Purchase	Purchase - Invoice	☐
Purchase	Purchase - Credit Memo	☐
Purchase	Purchase - Return Shipment	☐
Sales	Sales - Quote	☐
Sales	Sales - Order	☐
Sales	Sales - Shipment	☐
Sales	Sales - Invoice	☐
Sales	Sales - Credit Memo	☐
Sales	Sales - Blanket Order	☐
Sales	Sales - Return Order	☐
Sales	Sales - Return Receipt	☐
Sales	Sales - Pro Forma Invoice	☐
Service	Service - Quote	☐
Service	Service - Order	☐
Service	Service - Item Worksheet	☐
Service	Service - Shipment	☐
Service	Service - Invoice	☐
Service	Service - Credit Memo	☐
Service	Service - Warranty Claim	☐
Reminder	Issued Reminder	☐
Reminder	Reminder	☐

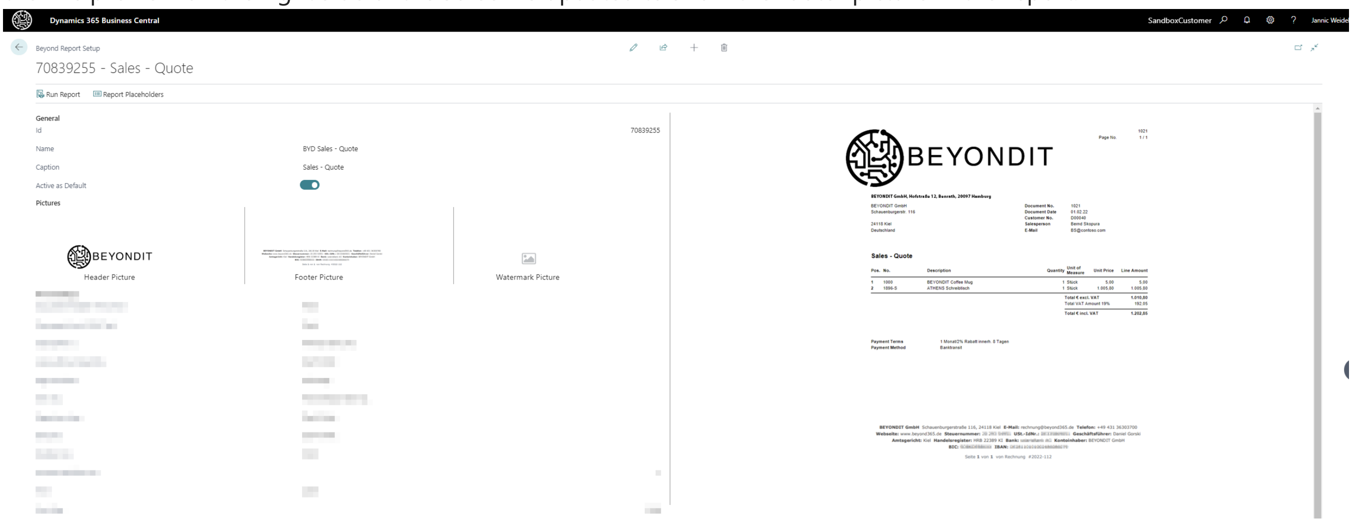
4. To change the footer picture for a specific report, click on the value under the **Report Area** column in the displayed list. For the following description of the print settings, we have selected the **Sales - Quote** report card.
5. The report card is displayed. On the left side of the screen you will find the print settings for the report. A report preview is displayed on the right edge of the screen.



6. In the **Pictures** area, move the mouse pointer to the **Footer Picture** icon. If a picture is set up for the report, it will be displayed in the **Pictures** area above the corresponding text in a reduced view.

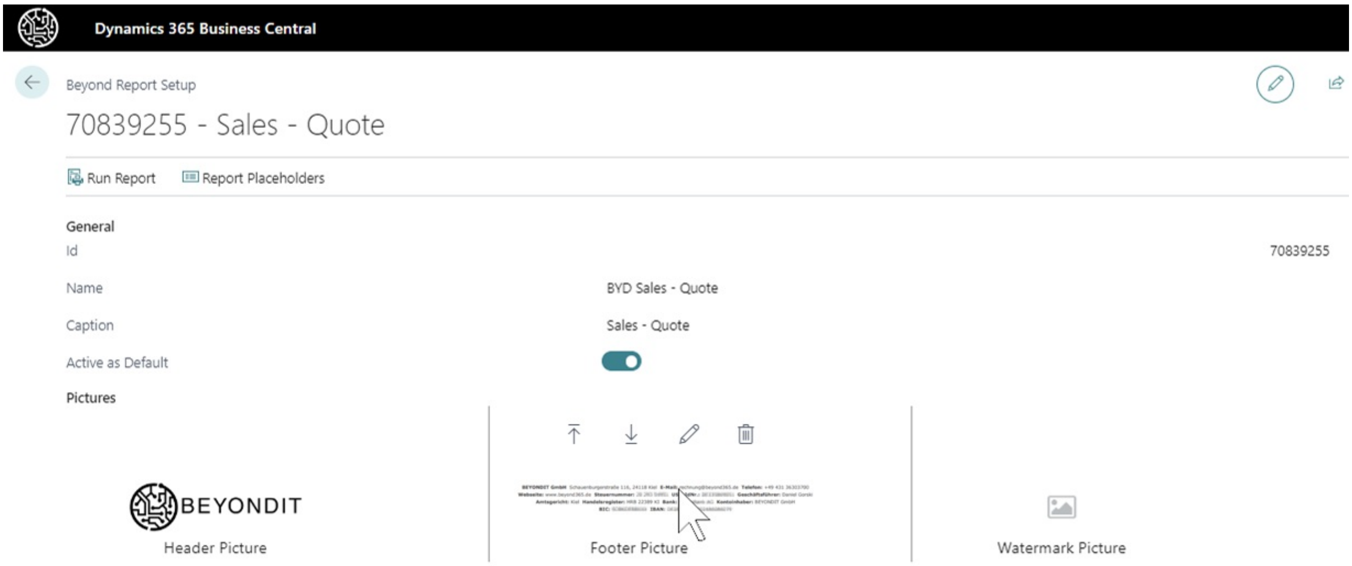


7. In the options menu for the footer picture, click the **Upload** icon .
8. The file explorer is displayed. Specify the path to the footer picture and select the appropriate picture. Observe the following given specifications:
   Size: 2480×531 px
   File Type: PNG file
   Features: transparent background (if possible)
9. Upload the picture file. The uploaded picture is displayed in a reduced size under the **Pictures** section. At the same time, the live preview on the right side of the screen is updated to show the footer picture in the report.

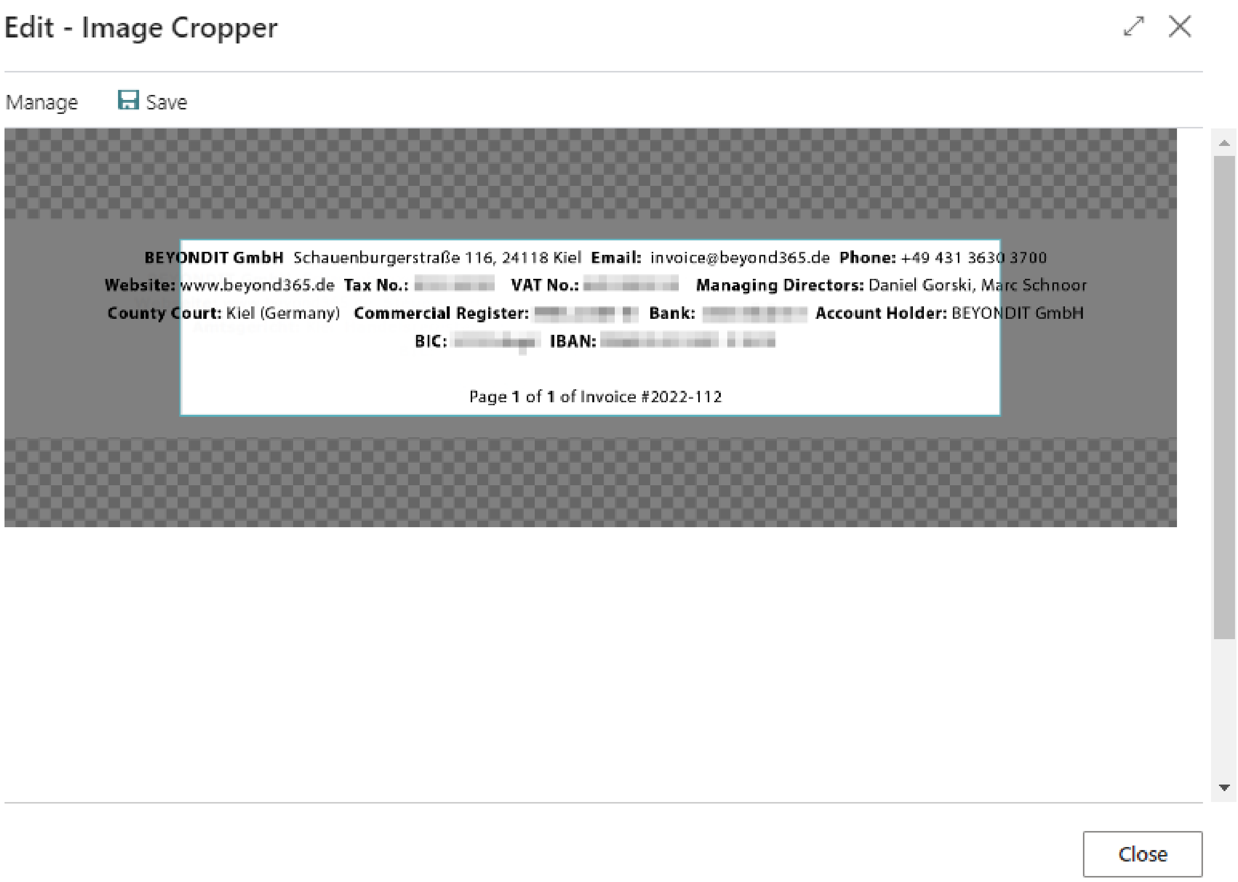


You have set the footer picture for the selected report. Note that this change is only applied to the selected report. If you want to change the size and placement of the footer picture you can do so using the additional footer picture menu options.

10. Move the mouse cursor to the header picture you have set up in the **Pictures** > **Footer Picture** area.



11. Click the **pen** icon .
12. The **Edit – Image Cropper** window is displayed.



13. While holding down the CTRL key, scroll the mouse wheel to enlarge or reduce the picture size.
14. Hold down the left mouse button to move the picture in the display area (blue rectangle: 2480×531 px).

To save the picture and use it in the report, click **Save** in the menu bar. The preview of the report is updated.

Setup Watermark

This section describes how to set up a watermark picture for a report in BEYOND Reports. If you used the Setup Wizard during the initial setup of BEYOND Reports, a watermark picture may already be set up. You can proceed as described below to change or customize the watermark picture for the selected report.

To set up a watermark picture for a report, do the following:

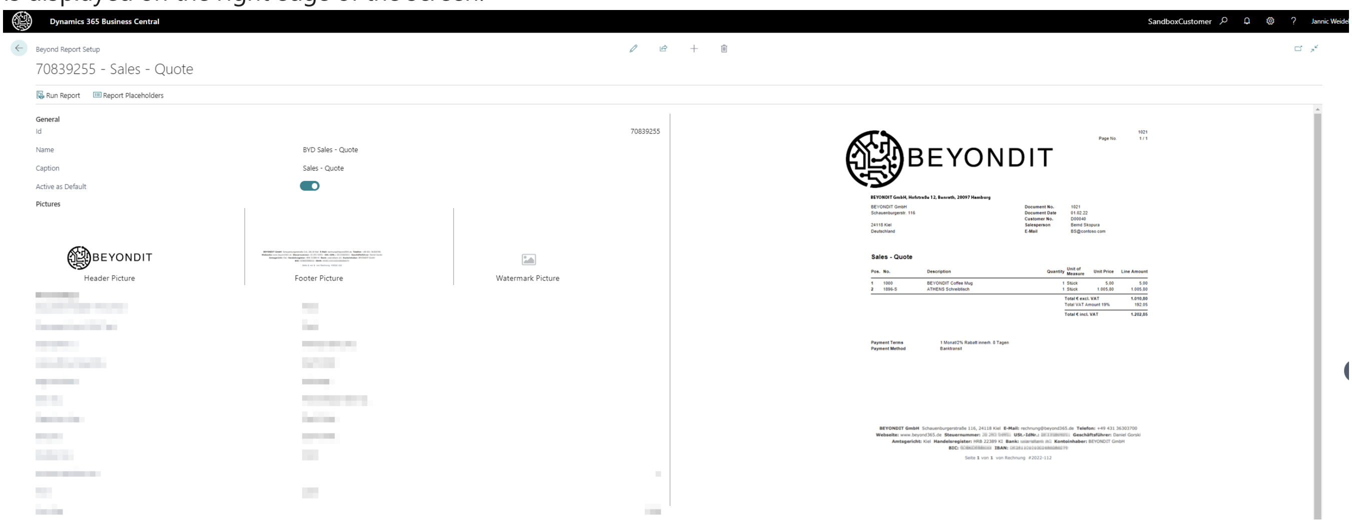
1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) .
3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.

Beyond Report Setup ✓Saved

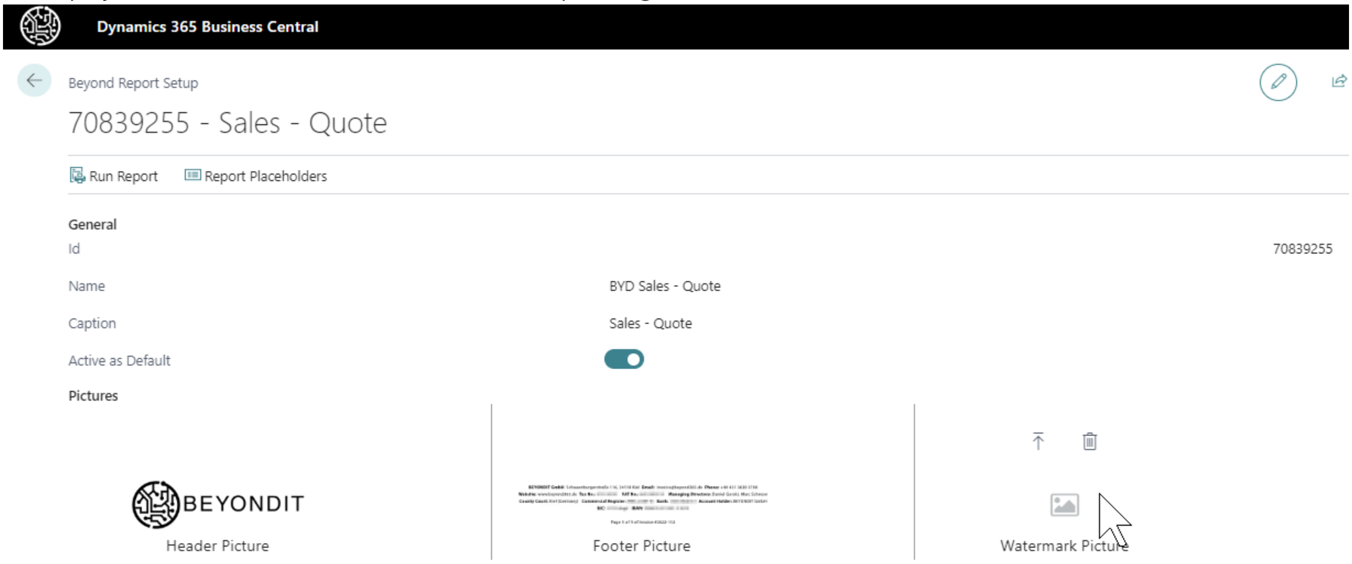
Search | Analyze | Edit List | Edit | View | Run Report | Report Placeholders

Report Area ↑	Caption	Active as Default
Purchase	Purchase - Quote	☑
Purchase	Purchase - Order	☐
Purchase	Purchase - Blanket Order	☐
Purchase	Purchase - Return Order	☐
Purchase	Purchase - Receipt	☐
Purchase	Purchase - Invoice	☐
Purchase	Purchase - Credit Memo	☐
Purchase	Purchase - Return Shipment	☐
Sales	Sales - Quote	☐
Sales	Sales - Order	☐
Sales	Sales - Shipment	☐
Sales	Sales - Invoice	☐
Sales	Sales - Credit Memo	☐
Sales	Sales - Blanket Order	☐
Sales	Sales - Return Order	☐
Sales	Sales - Return Receipt	☐
Sales	Sales - Pro Forma Invoice	☐
Service	Service - Quote	☐
Service	Service - Order	☐
Service	Service - Item Worksheet	☐
Service	Service - Shipment	☐
Service	Service - Invoice	☐
Service	Service - Credit Memo	☐
Service	Service - Warranty Claim	☐
Reminder	Issued Reminder	☐
Reminder	Reminder	☐

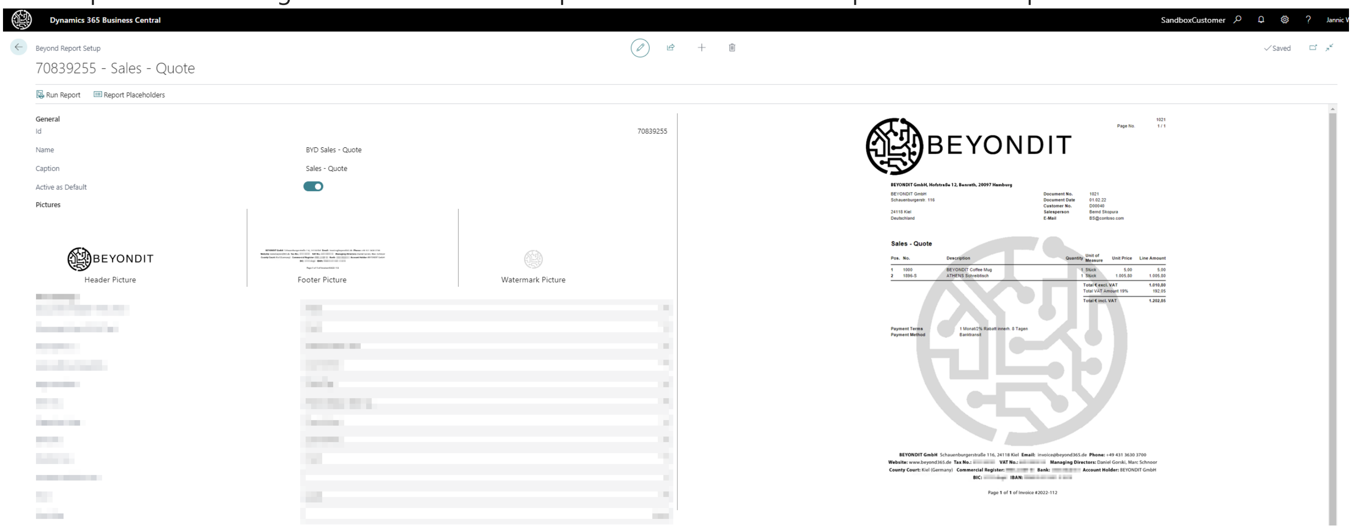
4. To change the watermark for a specific report, click on the value under the **Report Area** column in the displayed list. For the following description of the print settings, we have selected the **Sales - Quote** report card.
5. The report card is displayed. On the left side of the screen you will find the print settings for the report. A report preview is displayed on the right edge of the screen.



6. In the **Pictures** area, move the mouse pointer to the **Watermark Picture** icon. If a picture is set up for the report, it will be displayed in the **Pictures** area above the corresponding text in a reduced view.



7. In the options menu for the watermark picture, click the **Upload** icon .
8. The file explorer is displayed. Specify the path to the watermark picture and select the appropriate picture. Observe the following given specifications:
   Size: 800×800 px
   File Type: JPEG or PNG file
   Features: No colors (greyscale only), transparent background (if you use PNG)
9. Upload the picture file. The uploaded picture is displayed in a reduced size under the **Pictures** section. At the same time, the live preview on the right side of the screen is updated to show the footer picture in the report.



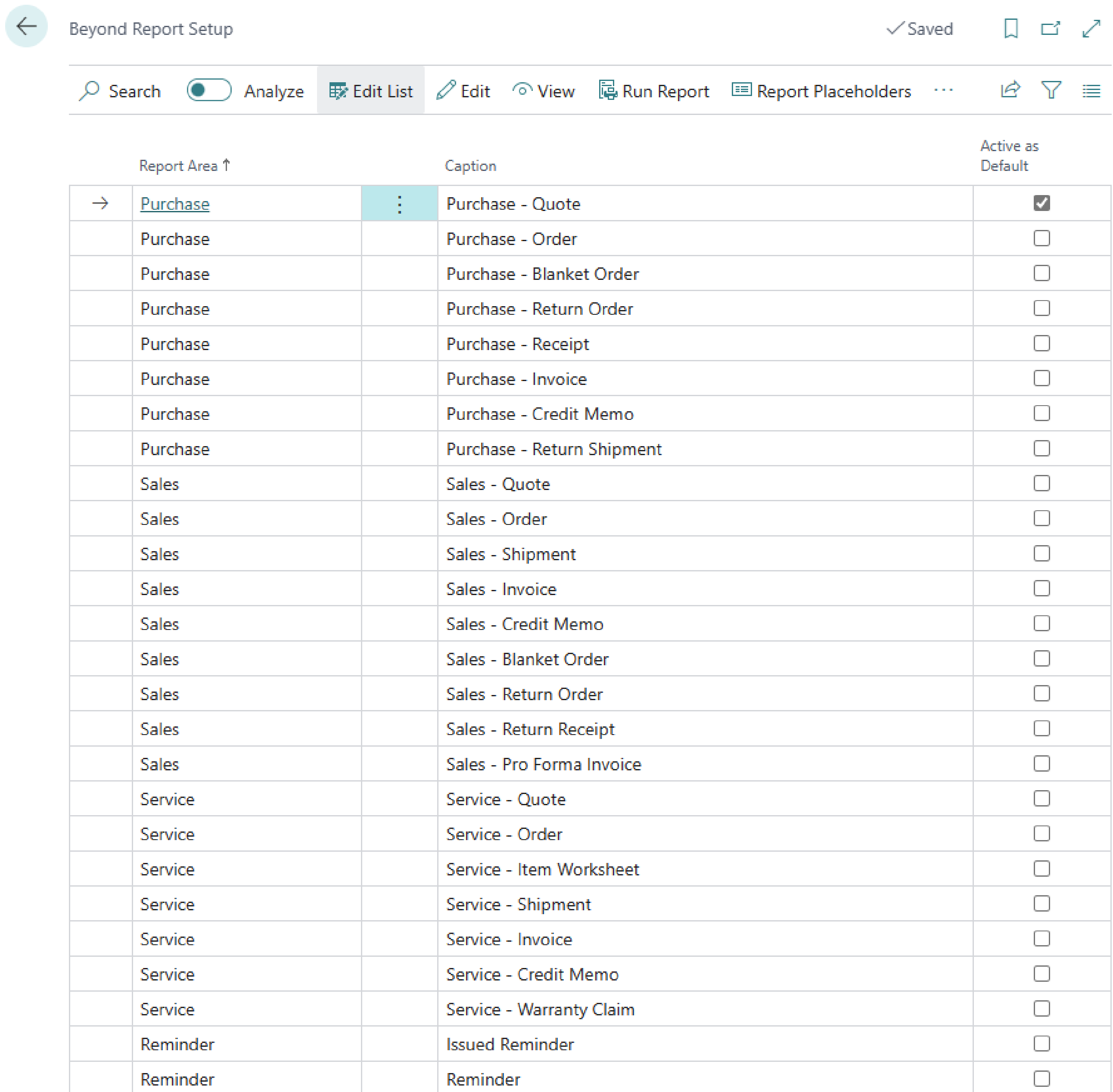
You have set the watermark picture for the selected report. Please note that this change is applied only to the selected report.

Available Print Settings

BEYOND Reports allows you to configure your reports quickly and easily, without the need for programming. Based on our template, you configure what should be printed/displayed in the report using so-called print settings. For some print settings you can even define where the information should be displayed/printed. In the following sections you will learn more about the available print settings.

To define the print settings for a report, proceed as follows:

1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) □.
3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.



Report Area ↑	Caption	Active as Default
Purchase	Purchase - Quote	☑
Purchase	Purchase - Order	☐
Purchase	Purchase - Blanket Order	☐
Purchase	Purchase - Return Order	☐
Purchase	Purchase - Receipt	☐
Purchase	Purchase - Invoice	☐
Purchase	Purchase - Credit Memo	☐
Purchase	Purchase - Return Shipment	☐
Sales	Sales - Quote	☐
Sales	Sales - Order	☐
Sales	Sales - Shipment	☐
Sales	Sales - Invoice	☐
Sales	Sales - Credit Memo	☐
Sales	Sales - Blanket Order	☐
Sales	Sales - Return Order	☐
Sales	Sales - Return Receipt	☐
Sales	Sales - Pro Forma Invoice	☐
Service	Service - Quote	☐
Service	Service - Order	☐
Service	Service - Item Worksheet	☐
Service	Service - Shipment	☐
Service	Service - Invoice	☐
Service	Service - Credit Memo	☐
Service	Service - Warranty Claim	☐
Reminder	Issued Reminder	☐
Reminder	Reminder	☐

4. From the list, select the report for which you want to define the print settings. If you want to define uniform print settings for all reports, we recommend using the setup wizard. For more information, see the Setup Wizard chapter.
5. The report card is displayed. Under the **Print Settings** area, you can choose between the following settings and your values:

- Document Header HTML Text
- Document Line HTML Text
- Description 2
- Lines without Quantity

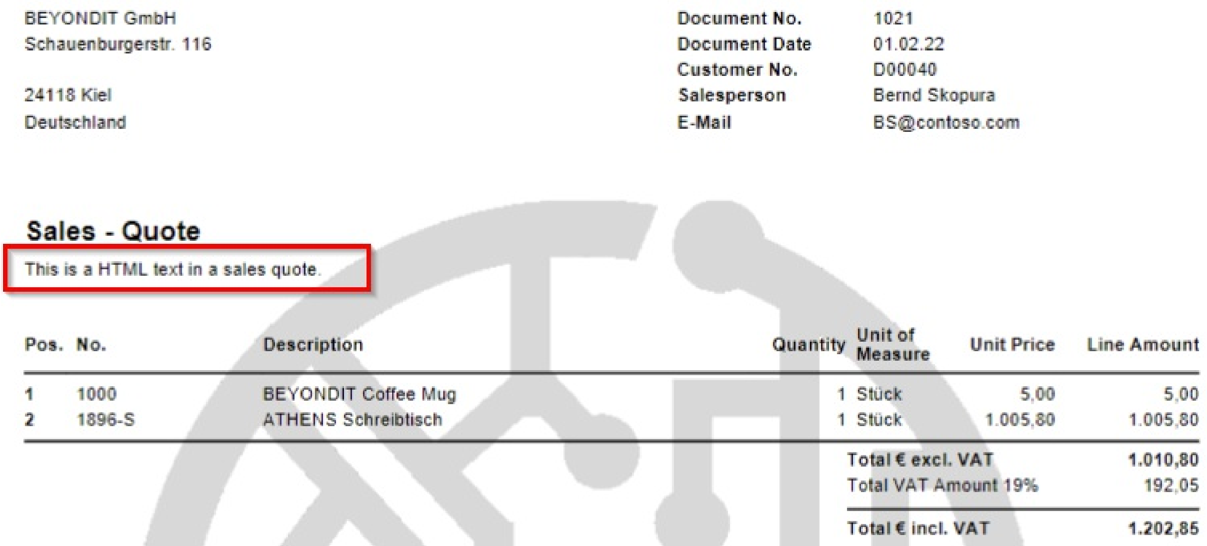
- Page Number
- Item No.
- Signature Area
- Barcode
- Position No.
- Increase Position No.
- Font
- Font Size

Document Header HTML Text

Use the print setting **Print document header HTML text** to specify whether HTML texts specified at document-level should be printed in the report.

> **NOTE**
>
> **HTML Texts – Document-Level**
> BEYOND Reports allows you to use HTML texts in document lines and in the document header. For more information on HTML texts in the document header, see the section Create Document-Level Pre-Text.

You can choose between the following values:
Don't Print: If you select this option, the HTML texts you have stored for the document header (document-level text) will not be printed.
Print: If you select this option, the HTML texts for the document header (document-level text) will be displayed and printed in the report.


BEYONDIT GmbH
Schauenburgerstr. 116

24118 Kiel
Deutschland

Document No.	1021
Document Date	01.02.22
Customer No.	D00040
Salesperson	Bernd Skopura
E-Mail	BS@contoso.com

Sales - Quote
This is a HTML text in a sales quote.

Pos.	No.	Description	Quantity	Unit of Measure	Unit Price	Line Amount
1	1000	BEYONDIT Coffee Mug	1	Stück	5,00	5,00
2	1896-S	ATHENS Schreibtisch	1	Stück	1.005,80	1.005,80
				Total € excl. VAT		1.010,80
				Total VAT Amount 19%		192,05
				Total € incl. VAT		1.202,85

Document Line HTML Text

Use the **Document Line HTML Text** print setting to specify whether HTML texts specified on the document card for lines should be printed in the report.

> **NOTE**
>
> **HTML Texte – Line-Level**
> BEYOND Reports allows you to use HTML texts on document-level and on line-level. For more information on HTML texts on line-level, see the sections Create Line-Level Pre-Text and Create Line-Level Post-Text.

You can choose between the following values:
Don't Print: If you select this option, the HTML texts you have defined for the document line(s) will not be printed.
Print: If you select this option, the HTML texts for the document line(s) will be displayed and printed in the report.

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Deutschland

Document No.	1021
Document Date	01.02.22
Customer No.	D00040
Salesperson	Bernd Skopura
E-Mail	BS@contoso.com

Sales - Quote

This is a HTML text in a sales quote.

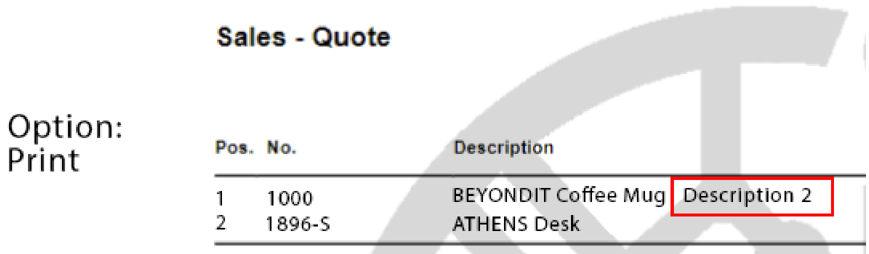
Pos.	No.	Description	Quantity	Unit of Measure	Unit Price	Line Amount
		This is a HTML Text in a item line in the sales quote.				
1	1000	BEYONDIT Coffee Mug	1	Stück	5,00	5,00
2	1896-S	ATHENS Schreibtisch	1	Stück	1.005,80	1.005,80

Total € excl. VAT	1.010,80
Total VAT Amount 19%	192,05
Total € incl. VAT	1.202,85

Description 2

Use the **Description 2** print setting to specify whether and how the value specified on the item card in the **Description 2** field should be printed in the report.

You can choose between the following values:
Don't Print: If you select this option, no additional information from the **Description 2** field (from the item card) will be displayed or printed in the report.
Print: If you select this option, the information specified (on the corresponding item card) under the **Description 2** field will be displayed or printed in the report. The information will be printed directly after the description of the item.

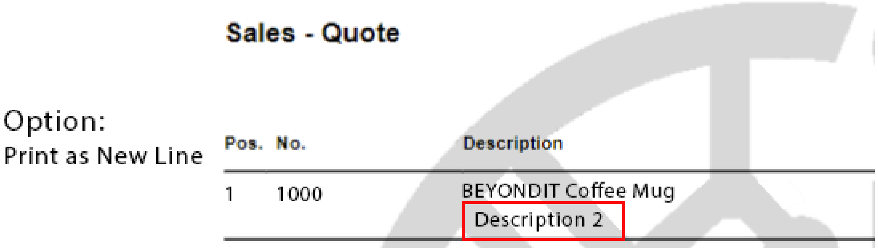


Option: Print

Sales - Quote

Pos.	No.	Description
1	1000	BEYONDIT Coffee Mug Description 2
2	1896-S	ATHENS Desk

Print as new Line: If you select this option, the information specified (on the corresponding item card) under the **Description 2** field will be displayed or printed in the report. Unlike the **Print** option, the information is printed on a new line.



Option:
Print as New Line

Sales - Quote

Pos.	No.	Description
1	1000	BEYONDIT Coffee Mug Description 2

Lines Without Quantity

Use the print setting **Lines Without Quantity** to specify whether lines with the value **0** in the field **Quantity** (or no vlaue stored for the **Quantity** field) should be printed in the report.

You can choose between the following values:
Don't Print: If you select this option, no lines with the quantity **0** or no deposited quantity will be displayed or printed in the report.
Print: If you select this option, lines with the quantity **0** or no value stored for the **Quantity** field will be displayed or printed in the report.

Sales - Quote

Pos.	No.	Description	Quantity	Unit of Measure	Unit Price	Line Amount
1	1000	BEYONDIT Coffee Mug	1	Piece	5,00	5,00
2	1896-S	ATHENS Schreibtisch	0	Piece	1005,80	0,00
			Total € excl. VAT			5,00

Page Number

Use the **Page no.** print setting to specify whether page numbers should be printed in the report.

You can choose between the following values:
Don't Print: If you select this option, no page numbers will be displayed or printed in the report.
Print Top: If you select this option, page numbers will be displayed and printed in the upper page area of the report.

Page No. 1 / 1

BEYONDIT

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BEYONDIT GmbH
Schauenburgerstr. 116

Document No. 1021
Document Date 01.02.22

Print Bottom: If you select this option, page numbers will be displayed and printed in the bottom page area of the report.

BEYONDIT GmbH Schauenburgerstraße 116, 24118 Kiel **Email:** invoice@beyond365.de **Phone:** +49 431 3630 3700
Website: www.beyond365.de **Tax No.:** [illegible] **VAT No.:** [illegible] **Managing Directors:** Daniel Gorski, Marc Schnoor
County Court: Kiel (Germany) **Commercial Register:** [illegible] **Bank:** [illegible] **Account Holder:** BEYONDIT GmbH
BIC: [illegible] **IBAN:** [illegible]

Page No. 1 / 1

Item No.

Use the **Item No.** print setting to define which item numbers should be printed in the report. With BEYOND Reports you can set to print your company's item number or the vendor's item numbers in the report.

You can choose between the following values:
Print: Select this option to specify for the report to print item numbers of your company in the report.
Print Vendor Item No.: Select this option to specify for the report that vendor item numbers should be printed in the report instead of your company's item numbers.

Page No. 1 / 1

BEYONDIT

BEONDIT GmbH, Hofstraße 12, Benrath, 20097 Hamburg

Fabrikam, Inc.
Krystal York
Hamburger Str. 18
, GA GA 31772
USA

Document No.	1001
Document Date	01.02.22
Vendor No.	10000

Purchase - Quote

Pos.	No.	Description	Quantity	Unit of Measure	Unit Cost	Line Amount
1	Fabrikham-01033541	BEYONDIT Coffee Mug	10	Stück	5,00	50,00
				Total excl. VAT		**50,00**
				Total VAT Amount 0%		0,00
				Total incl. VAT		**50,00**

Ship-to Address CRONUS DE, Hofstraße 12, Benrath, 20097 Hamburg, Deutschland
Payment Terms Laufender Monat

Signature Area

Use the **Signature area** print setting to specify whether one or more areas for signatures should be printed in the report.

You can choose between the following values:
Don't Print: Select this option to specify that no area for one or more signatures should be printed in the report.
Print: Select this option to specify that areas for two signatures should be printed in the report. One area is printed in the report for your employee's signature and one for the business partner's signature (vendor for purchase reports and customer for sales reports).

Sales - Quote

Pos.	No.	Description	Quantity	Unit of Measure	Unit Price	Line Amount
1	1000	BEYONDIT Coffee Mug	1	Stück	5,00	5,00
2	1896-S	ATHENS Schreibtisch	1	Stück	1.005,80	1.005,80
				Total € excl. VAT		**1.010,80**
				Total VAT Amount 19%		192,05
				Total € incl. VAT		**1.202,85**

Payment Terms 1 Monat/2% Rabatt innerh. 8 Tagen
Payment Method Banktransit

Signature Employee

Signature Customer

Print Customer/Vendor: Select this option to specify that only the signature area for the business partner (vendor signature area for purchase reports or customer signature area for sales reports) should be printed in the report.

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Fabrikam, Inc.
Krystal York
Hamburger Str. 18
, GA GA 31772
USA

Document No.	1001
Document Date	01.02.22
Vendor No.	10000

Purchase - Quote

No.	Description	Quantity	Unit of Measure	Unit Cost	Line Amount
1000	BEYONDIT Coffee Mug	10	Stück	5,00	50,00

Total excl. VAT	**50,00**
Total VAT Amount 0%	0,00
Total incl. VAT	**50,00**

Ship-to Address	CRONUS DE, Hofstraße 12, Benrath, 20097 Hamburg, Deutschland
Payment Terms	Laufender Monat
Payment Method	Banktransit

Signature Vendor

Print Employee: Select this option to specify that only the employee signature area for your company should be printed in the report.

Purchase - Quote

No.	Description	Quantity	Unit of Measure	Unit Cost	Line Amount
1000	BEYONDIT Coffee Mug	10	Stück	5,00	50,00

Total excl. VAT	**50,00**
Total VAT Amount 0%	0,00
Total incl. VAT	**50,00**

Ship-to Address	CRONUS DE, Hofstraße 12, Benrath, 20097 Hamburg, Deutschland
Payment Terms	Laufender Monat
Payment Method	Banktransit

Signature Employee

Barcode

Use the **Barcode** print setting to specify whether a barcode should be printed in the report. The barcode represents the document number as a barcode (Code 128).

You can choose between the following values:
Don't Print: Select this option to specify that no barcode should be printed in the report.
Print: Select this option to print a barcode in the report. The barcode will be printed between the set header picture and the document lines.

Page No. 1 / 1

BEYONDIT

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BEYONDIT GmbH
Schauenburgerstr. 116

24118 Kiel
Deutschland

Document No.	1021
Document Date	01.02.22
Customer No.	D00040
Salesperson	Bernd Skopura
E-Mail	BS@contoso.com

Sales - Quote

Pos.	No.	Description	Quantity	Unit of Measure	Unit Price	Line Amount

Position No.

Use the **Position No.** print setting to specify whether numbers are to be printed for the document lines to identify the items. The item numbers make it easier to keep track of extensive reports.

You can choose between the following values:
Don't Print: Select this option to specify that no position numbers should be printed in the report.

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Fabrikam, Inc.
Krystal York
Hamburger Str. 18
, GA GA 31772
USA

Document No.	1001
Document Date	01.02.22
Vendor No.	10000

Purchase - Quote

No.	Description	Quantity	Unit of Measure	Unit Cost	Line Amount
1000	BEYONDIT Coffee Mug	10	Stück	5,00	50,00
			Total excl. VAT		**50,00**
			Total VAT Amount 0%		0,00
			Total incl. VAT		**50,00**

Ship-to Address	CRONUS DE, Hofstraße 12, Benrath, 20097 Hamburg, Deutschland
Payment Terms	Laufender Monat
Payment Method	Banktransit

Print: Select this option to specify whether position numbers are to be printed in the report. The position numbers are printed at the beginning of the report line. The incremental steps for the position number can be defined with the Increase Position No. print setting.

Purchase - Quote

Pos.	No.	Description	Quantity	Unit of Measure	Unit Cost	Line Amount
1	1000	BEYONDIT Coffee Mug	10	Stück	5,00	50,00
				Total excl. VAT		**50,00**
				Total VAT Amount 0%		0,00
				Total incl. VAT		**50,00**

Ship-to Address	CRONUS DE, Hofstraße 12, Benrath, 20097 Hamburg, Deutschland
Payment Terms	Laufender Monat
Payment Method	Banktransit

Increase Position No.

Use the **Increase Position No.** print setting to specify in which steps the position number in the report should be increased. Enter an integer value in the input field. The numerical value entered will automatically be used as the starting value for the first position number in the report.

Font

Use the **Font** print setting to specify the font to be used in the report. Enter the font of your company in the input field.

> ⚠ **WARNING**
>
> **Changes to the Font**
> Changing the font has a great impact on the report design. It can cause unwanted column breaks in reports. Check if the font change has affected the report design before creating new documents. We recommend that you refresh the preview each time you make a change and stitch test several reports of the corresponding report type for which you changed the font.

Font Size

Use the **Font size** print setting to specify the default font size in the report. Enter the font size in the input field.

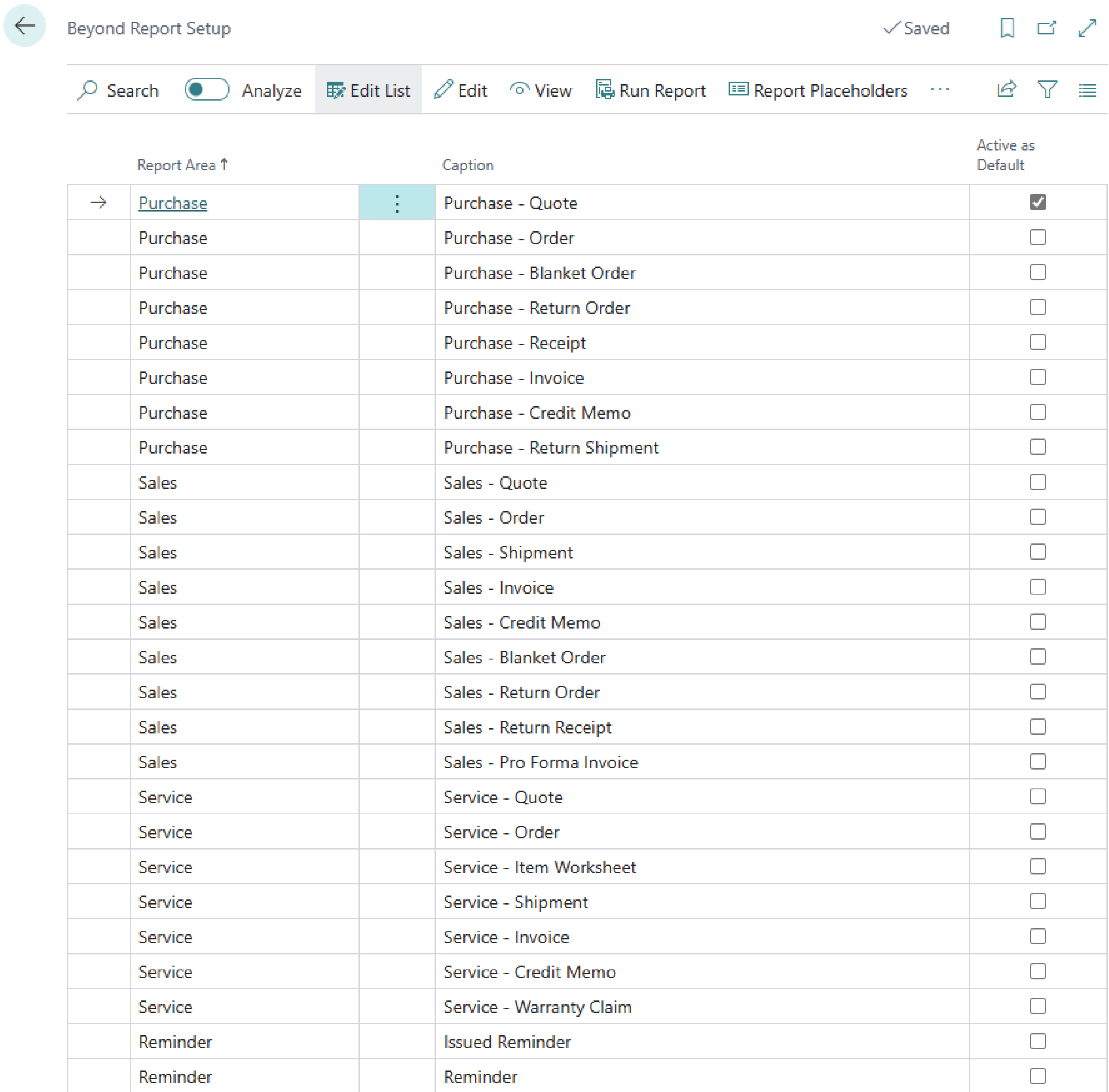
> ⚠ **WARNING**
>
> **Changes to the Font Size**
> Changing the font size has a great impact on the report design. It can cause unwanted column breaks in reports. Check if the font size change has affected the report design before creating new documents. We recommend that you refresh the preview each time you make a change and stitch test several reports of the corresponding report type for which you changed the font size.

Use BEYOND Reports

To use the configured reports from BEYOND Reports in Mircosoft Business Central, you need to set them as the default report to use.

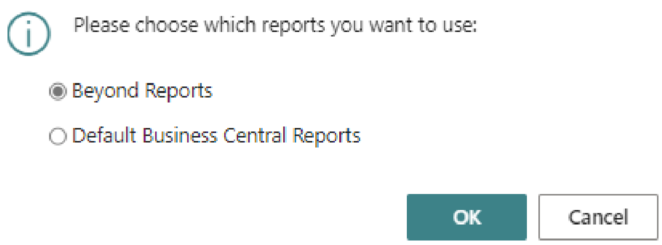
To do this, proceed as follows:

1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) .
3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.



Report Area ↑	Caption	Active as Default
Purchase	Purchase - Quote	☑
Purchase	Purchase - Order	☐
Purchase	Purchase - Blanket Order	☐
Purchase	Purchase - Return Order	☐
Purchase	Purchase - Receipt	☐
Purchase	Purchase - Invoice	☐
Purchase	Purchase - Credit Memo	☐
Purchase	Purchase - Return Shipment	☐
Sales	Sales - Quote	☐
Sales	Sales - Order	☐
Sales	Sales - Shipment	☐
Sales	Sales - Invoice	☐
Sales	Sales - Credit Memo	☐
Sales	Sales - Blanket Order	☐
Sales	Sales - Return Order	☐
Sales	Sales - Return Receipt	☐
Sales	Sales - Pro Forma Invoice	☐
Service	Service - Quote	☐
Service	Service - Order	☐
Service	Service - Item Worksheet	☐
Service	Service - Shipment	☐
Service	Service - Invoice	☐
Service	Service - Credit Memo	☐
Service	Service - Warranty Claim	☐
Reminder	Issued Reminder	☐
Reminder	Reminder	☐

4. Click **Setup Report Selections** from the menu bar.
5. A dialog box is displayed asking you which reports you want to use:



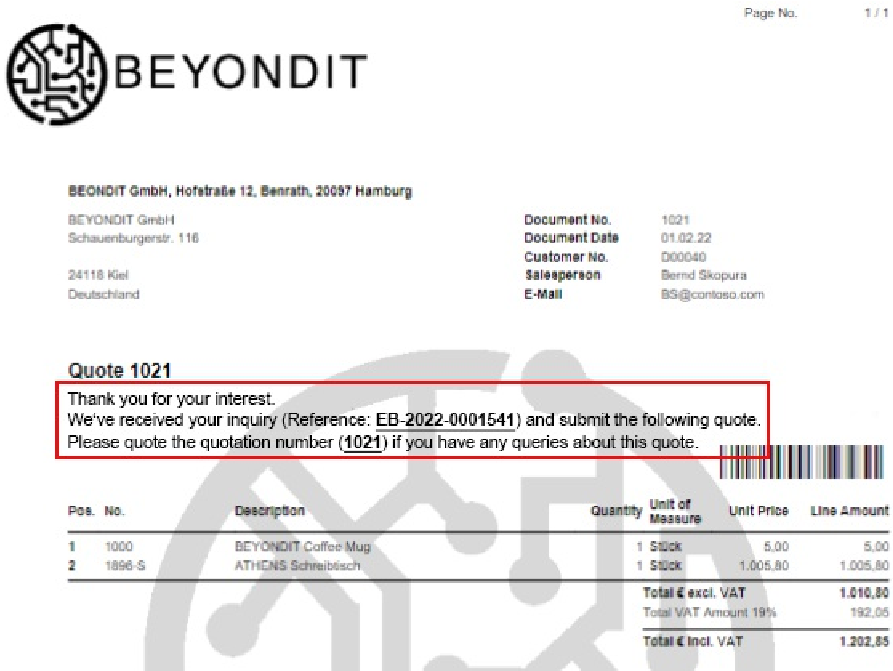
6. Select the **Beyond Reports** option and click **OK**.
   >[!NOTE]
   >**Use Default Reports**
   You can switch back to the standard Business Central reports at any time. To do this, proceed as described above and confirm the dialog box with the **Default Business Central Reports** option selected.

You have successfully changed the default reports to be used in the system. Depending on the option selected in the dialog box, the reports from BEYOND Reports or the default reports from Business Central will be used. On the **Beyond Reports Setup** page, you can see which report template is used in your Business Central by looking at the checkboxes under the **Active as Default** column. When the check box is selected for a line, a report from BEYOND Reports is used. If the checkbox is disabled, the default report from Business Central will be used.

Next Chapter

Use Placeholders

BEYOND Reports allows you to use so-called placeholders for field values (from fields in the document header). You can use these placeholders in texts and in field captions for the reports. The placeholders reference a field value from the document header. In the image of the report preview below, the field values referenced with placeholders (**Your Reference** and **Document Number**) are formatted in bold and underlined.


Page No. 1 / 1

BEYONDIT

BEONDIT GmbH, Hofstraße 12, Benrath, 20097 Hamburg

BEYONDIT GmbH
Schauenburgerstr. 116

24118 Kiel
Deutschland

Document No.	1021
Document Date	01.02.22
Customer No.	D00040
Salesperson	Bernd Skopura
E-Mail	BS@contoso.com

Quote 1021

Thank you for your interest.
We've received your inquiry (Reference: EB-2022-0001541) and submit the following quote.
Please quote the quotation number (1021) if you have any queries about this quote.

Pos.	No.	Description	Quantity	Unit of Measure	Unit Price	Line Amount
1	1000	BEYONDIT Coffee Mug	1	Stück	5,00	5,00
2	1896-S	ATHENS Schreibtisch	1	Stück	1.005,80	1.005,80
				Total € excl. VAT		1.010,80
				Total VAT Amount 19%		192,05
				Total € incl. VAT		1.202,85

In the following sections we will show you how to:

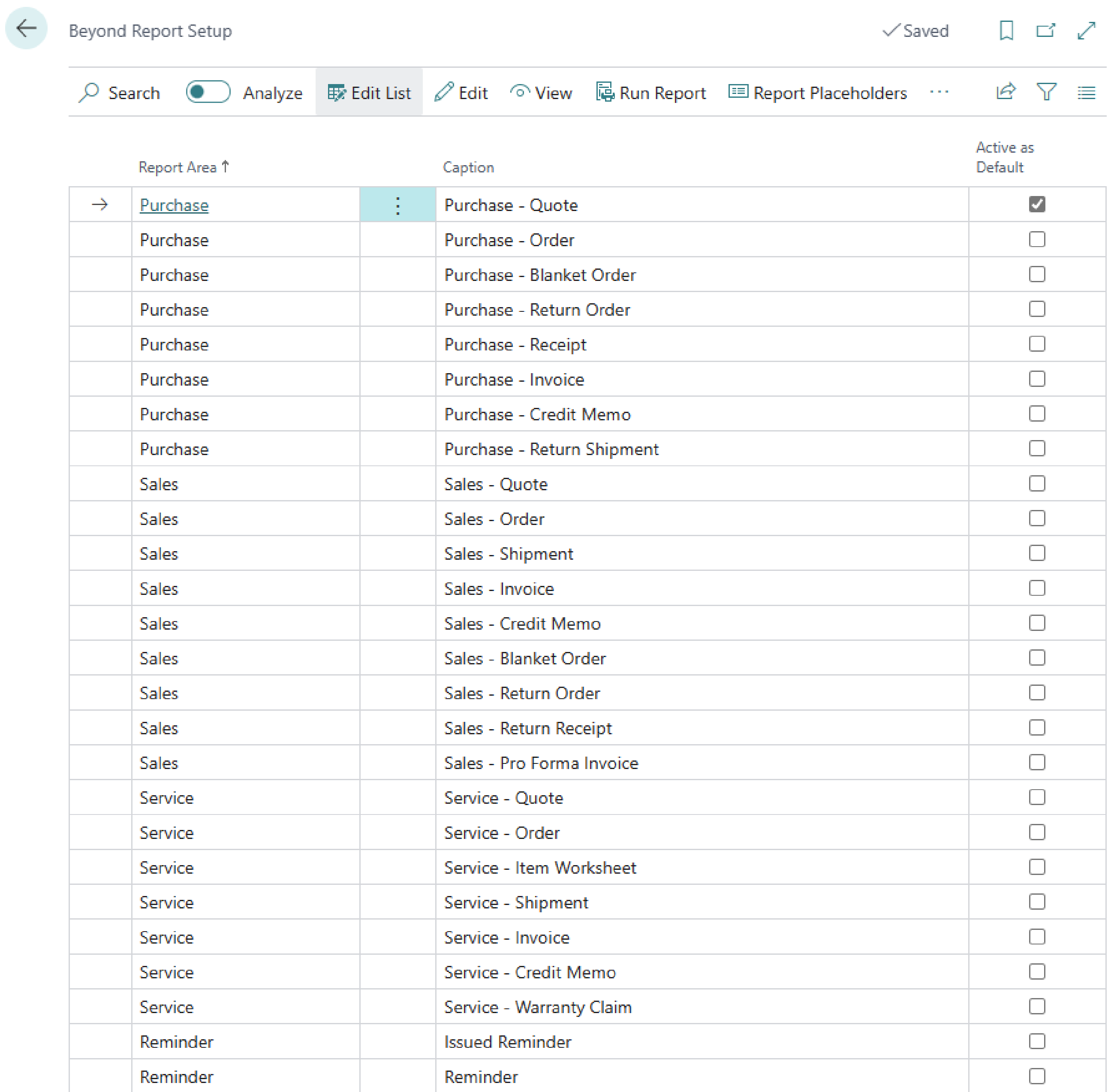
- Create Placeholder
- Use Placeholders in Field Captions

Create Placeholder

This section describes how to create a placeholder for a report. You can then use this placeholder in the following sections in pre- and post-texts as well as in field captions.

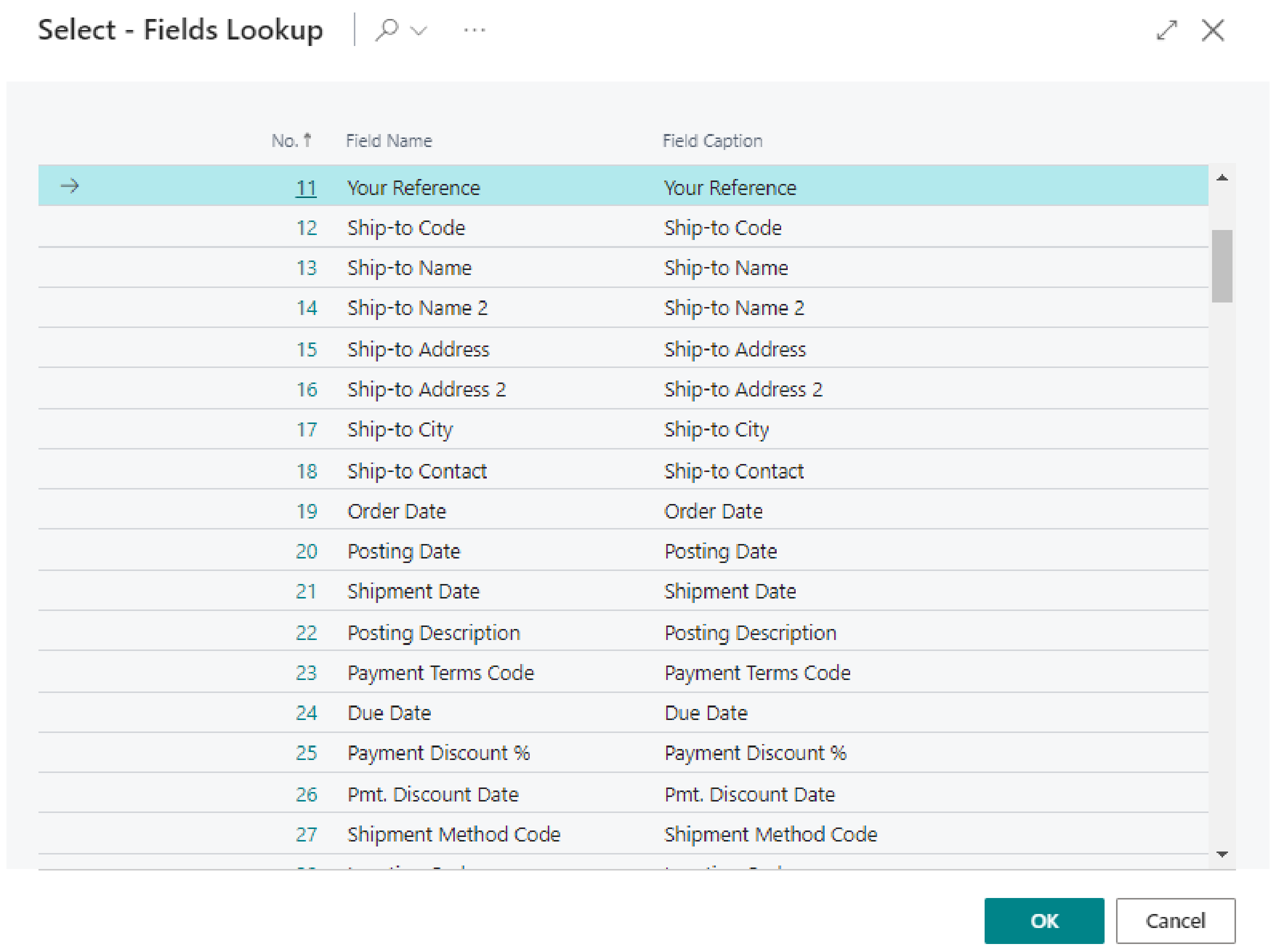
To create a placeholder for a specific report (for example, for the sales quote), proceed as follows:

1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) □.
3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.



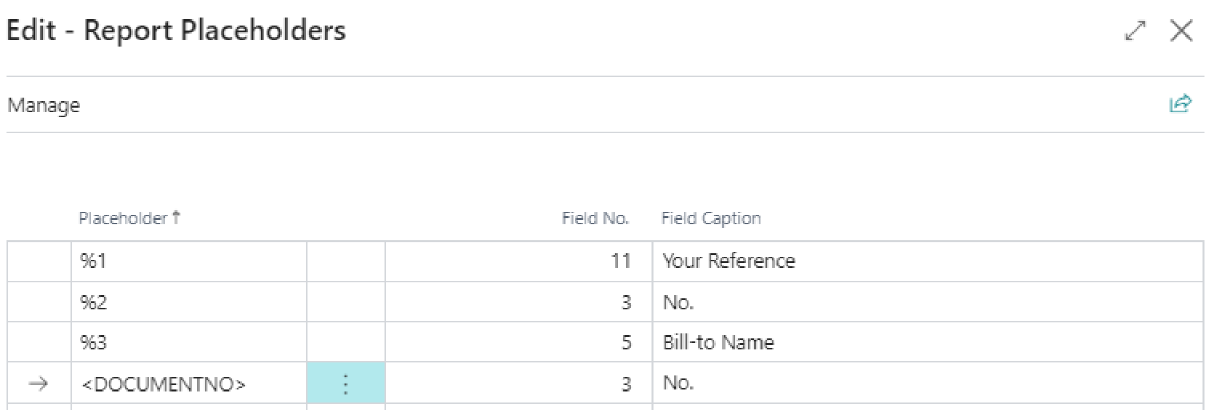
Report Area ↑	Caption	Active as Default
Purchase	Purchase - Quote	☑
Purchase	Purchase - Order	☐
Purchase	Purchase - Blanket Order	☐
Purchase	Purchase - Return Order	☐
Purchase	Purchase - Receipt	☐
Purchase	Purchase - Invoice	☐
Purchase	Purchase - Credit Memo	☐
Purchase	Purchase - Return Shipment	☐
Sales	Sales - Quote	☐
Sales	Sales - Order	☐
Sales	Sales - Shipment	☐
Sales	Sales - Invoice	☐
Sales	Sales - Credit Memo	☐
Sales	Sales - Blanket Order	☐
Sales	Sales - Return Order	☐
Sales	Sales - Return Receipt	☐
Sales	Sales - Pro Forma Invoice	☐
Service	Service - Quote	☐
Service	Service - Order	☐
Service	Service - Item Worksheet	☐
Service	Service - Shipment	☐
Service	Service - Invoice	☐
Service	Service - Credit Memo	☐
Service	Service - Warranty Claim	☐
Reminder	Issued Reminder	☐
Reminder	Reminder	☐

4. To create a placeholder for a report template, click the value under the **Report Area** column in the list that is displayed. For the description below, we have selected the **Sales - Quote** report card.
5. The report card is displayed.
6. Click **Report Placeholder** in the menu bar.
7. The **Placeholder** page is displayed.
8. Click in the input field for the **Placeholder** column and define a placeholder (e.g.) **%1** or **<DOCUMENTNO>**).
9. Click in the input field for the **Field No.** column and extend the dropdown list.
10. To see the complete list of available fields whose field values you can reference, click **Select from full list**.



11. Select the field (field value) to be referenced for the defined placeholder (**%1**) from the list. Use the search function to find a field.

12. To create the placeholder, click **OK**. Repeat the steps to create the placeholders you want to use in the report.

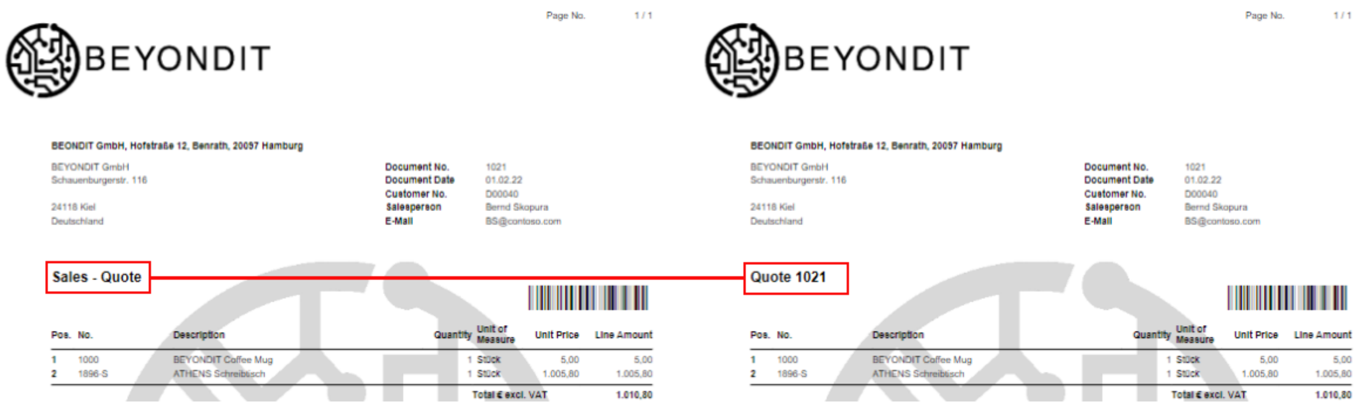


In the figure you can see how placeholders are defined:

- **%1**: The **%1** placeholder references the individual value of the **Your Reference** field on the Sales Quote card (since the **Sales - Quote** report was selected on the **Beyond Reports Setup** page).
- **%2**: The **%2** placeholder references the number of the document (the sales quote).
- **<DOCUMENTNO>**: The **<DOCUMENTNO>** placeholder also references the number of the document, i.e. you can use the **<DOCUMENTNO>** placeholder in texts, free texts or field captions as well as the **%2** placeholder.

Use Placeholders in Field Captions

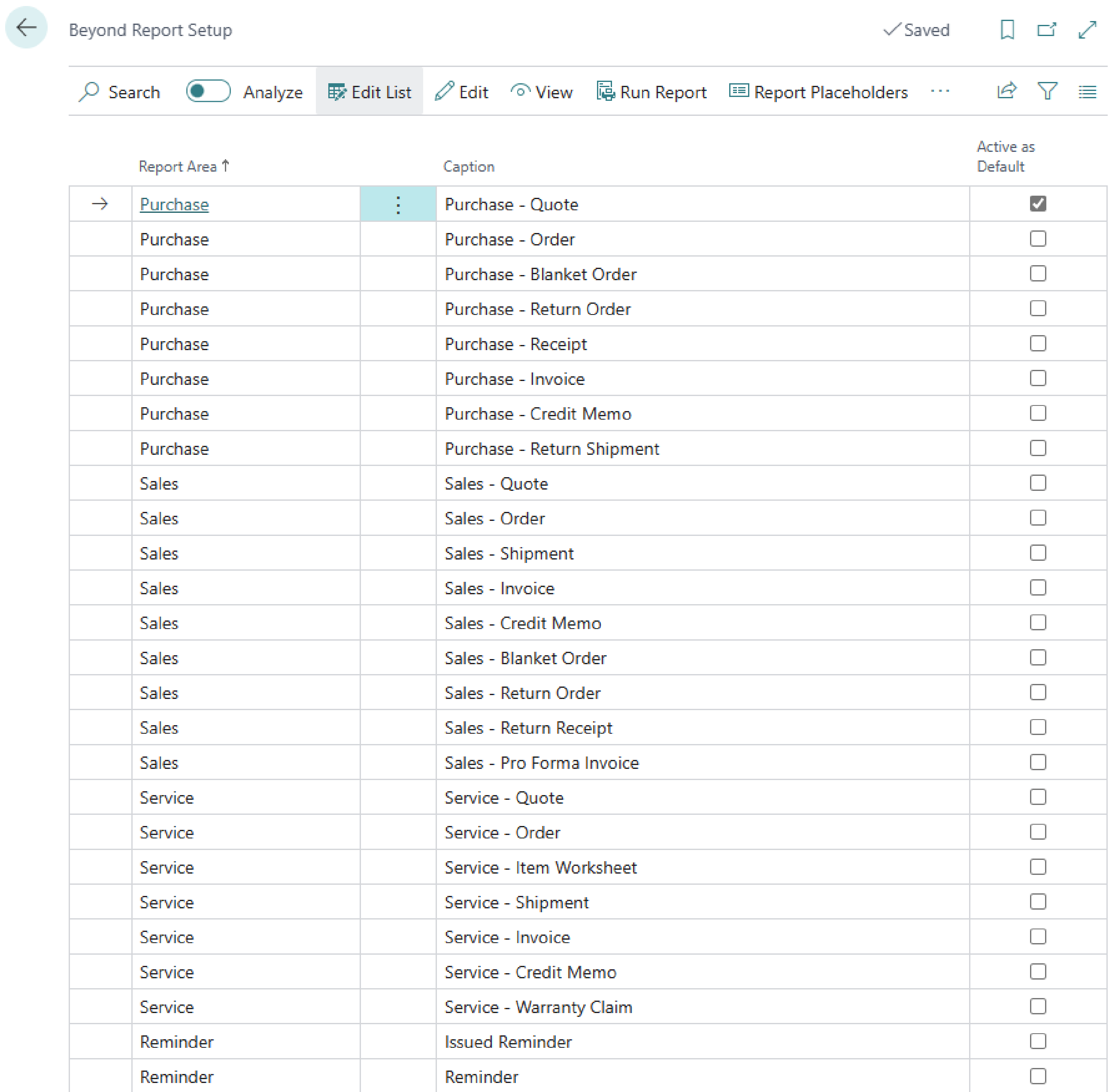
This section describes how to use placeholders in a report-specific field caption. BEYOND Reports allows you to use a custom field caption for a report.



The figure shows the effects of using a placeholder (for the document number) in the field caption for the report title. For the following description, we assume that you have already created a placeholder for the document number. For more information, see the Create placeholder section.

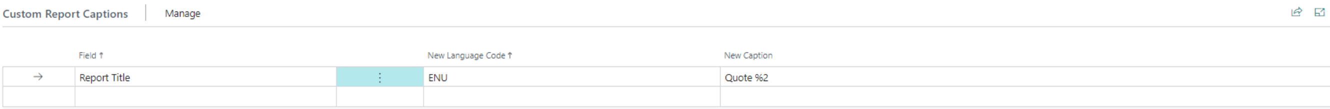
To use a placeholder in a field caption, do the following:

1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) .
3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.



Report Area ↑	Caption	Active as Default
Purchase	Purchase - Quote	☑
Purchase	Purchase - Order	☐
Purchase	Purchase - Blanket Order	☐
Purchase	Purchase - Return Order	☐
Purchase	Purchase - Receipt	☐
Purchase	Purchase - Invoice	☐
Purchase	Purchase - Credit Memo	☐
Purchase	Purchase - Return Shipment	☐
Sales	Sales - Quote	☐
Sales	Sales - Order	☐
Sales	Sales - Shipment	☐
Sales	Sales - Invoice	☐
Sales	Sales - Credit Memo	☐
Sales	Sales - Blanket Order	☐
Sales	Sales - Return Order	☐
Sales	Sales - Return Receipt	☐
Sales	Sales - Pro Forma Invoice	☐
Service	Service - Quote	☐
Service	Service - Order	☐
Service	Service - Item Worksheet	☐
Service	Service - Shipment	☐
Service	Service - Invoice	☐
Service	Service - Credit Memo	☐
Service	Service - Warranty Claim	☐
Reminder	Issued Reminder	☐
Reminder	Reminder	☐

4. Click on the corresponding report (in our example **Sales - Quote**). The report card will be displayed.
5. Scroll down to the **Custom Report Captions** tab.
6. Click in the input field of the **Field** column and change the displayed value to **Report Title** (or to the field caption you want to customize).
7. Click in the input field in the **Language Code** column and enter the language code (for English enter **ENU**).
8. In the input field under the **New Caption** column, enter the new field caption (e.g. **Quote**) and the corresponding placeholder (in our example **%2** for the document number).

   You have used a placeholder in a field caption. The preview is updated automatically.

> **NOTE**
>
> **Place Field Captions**
> If your customized field caption is not displayed, it is because the corresponding field is not placed in the report. Check under the **Field Placement** tab whether the field for which you have changed the caption is configured to be displayed in one of the available areas (**Top Left**, **Top Right** or **Bottom**).

For more information on how to customize field captions and place fields in the report, see the Display Header Fields in Reports chapter.

Display Header Fields in Reports

BEYOND Reports allows you to show additional fields and their field values in the BEYOND Reports report templates and place them in three predefined areas. You can also change the field labels in real time in the report.

The contents in this chapter are divided into the following sections:

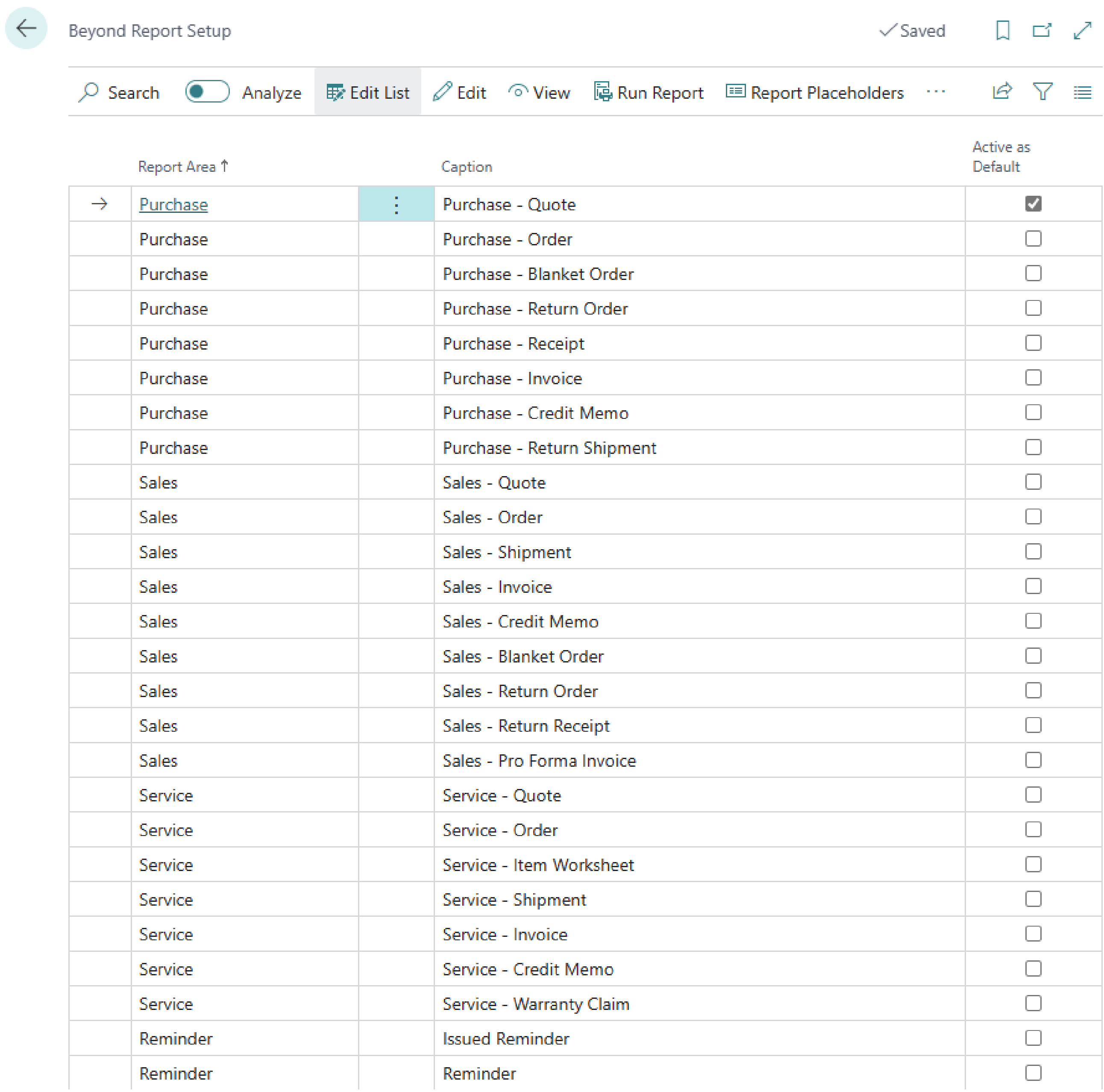
- Display and Position Fields in Reports
- Edit Field Captions

Display and Position Fields in Reports

This section describes how to add a field from the report header to the report template and position it in a predefined area.

To add and position a header field to the template, do the following:

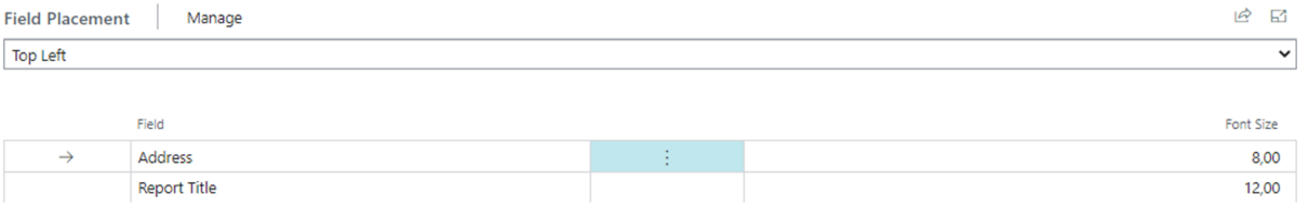
1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) .
3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.



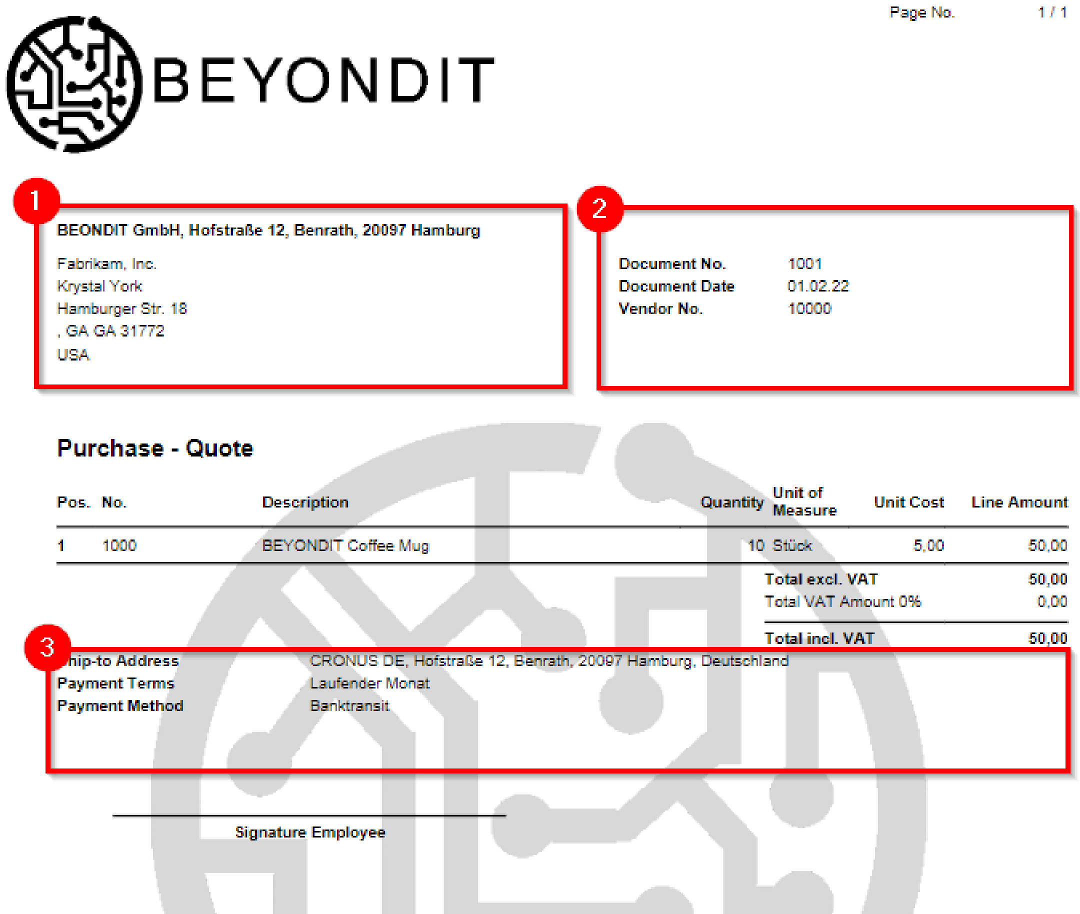
Report Area ↑	Caption	Active as Default
Purchase	Purchase - Quote	☑
Purchase	Purchase - Order	☐
Purchase	Purchase - Blanket Order	☐
Purchase	Purchase - Return Order	☐
Purchase	Purchase - Receipt	☐
Purchase	Purchase - Invoice	☐
Purchase	Purchase - Credit Memo	☐
Purchase	Purchase - Return Shipment	☐
Sales	Sales - Quote	☐
Sales	Sales - Order	☐
Sales	Sales - Shipment	☐
Sales	Sales - Invoice	☐
Sales	Sales - Credit Memo	☐
Sales	Sales - Blanket Order	☐
Sales	Sales - Return Order	☐
Sales	Sales - Return Receipt	☐
Sales	Sales - Pro Forma Invoice	☐
Service	Service - Quote	☐
Service	Service - Order	☐
Service	Service - Item Worksheet	☐
Service	Service - Shipment	☐
Service	Service - Invoice	☐
Service	Service - Credit Memo	☐
Service	Service - Warranty Claim	☐
Reminder	Issued Reminder	☐
Reminder	Reminder	☐

4. To add a report header field with the corresponding field value to the report template, click on the value under the **Report Area** column in the displayed list. For the following description, we have selected the **Sales - Quote** report card.

5. The report card is displayed.
6. Scroll down to the **Field Placement** tab.
7. From the dropdown list, select the area where you want to add a report header field:



   - **Top Left** (1): Select this area to display a report header field (left-aligned) between the address and the document lines.
   - **Top Right** (2): Select this area to display a report header field (right-aligned) between the address and the document lines.
   - **Bottom** (3): Select this area to show a report header field below the total and above the setup footer picture.



8. Select the report header field to be displayed from the dropdown list under the **Field** column.

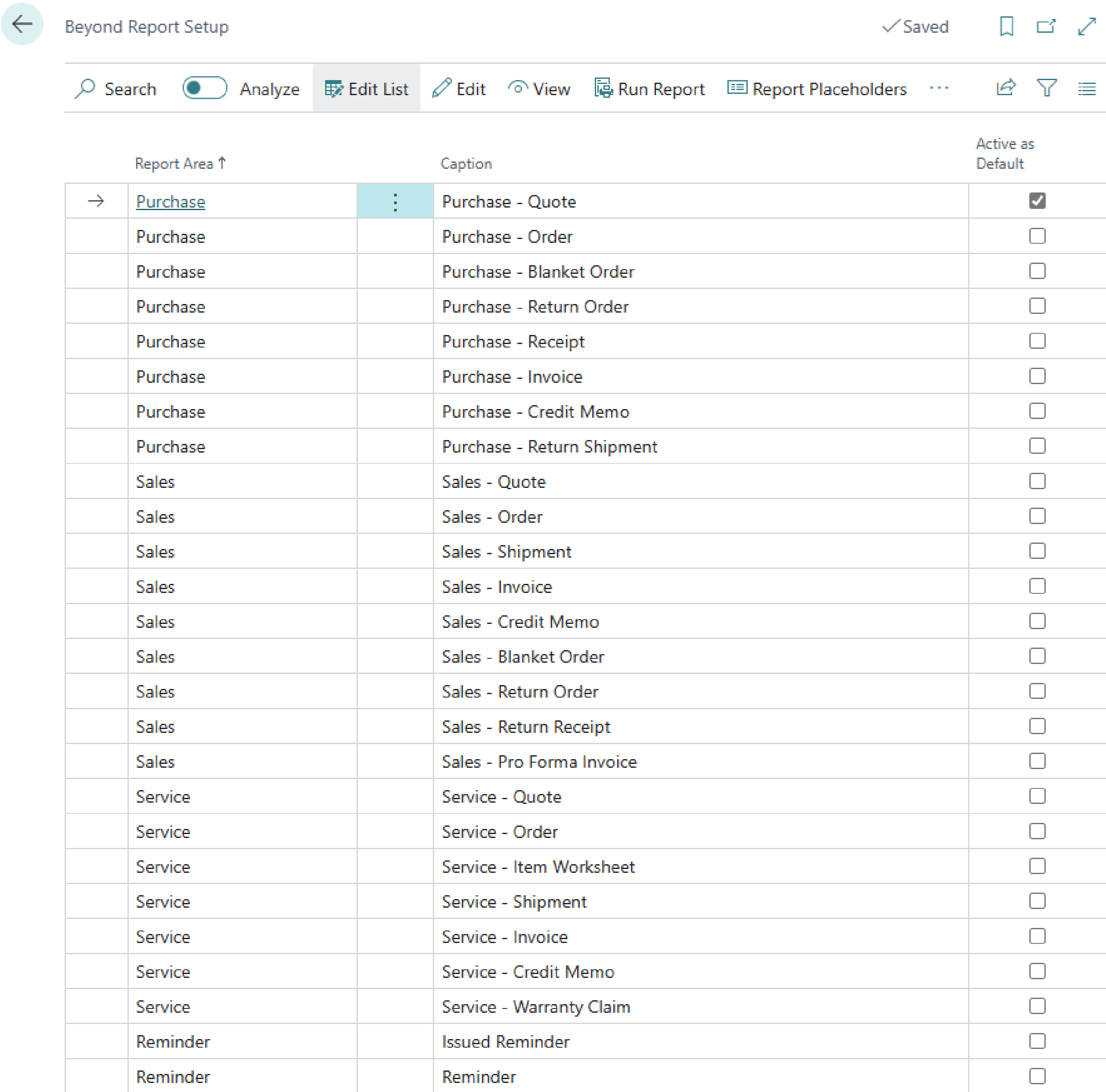
The live preview of the report is automatically updated to show the report header fields you set. You can also customize the field captions (see Edit Field Captions) and use placeholders in captions (see Use Placeholders in a Field Caption).

Edit Field Captions

This section describes how to change a field caption for a displayed field.

To change a field caption for a displayed field in the report template, proceed as follows:

1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) .
3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.



Report Area ↑	Caption	Active as Default
Purchase	Purchase - Quote	☑
Purchase	Purchase - Order	☐
Purchase	Purchase - Blanket Order	☐
Purchase	Purchase - Return Order	☐
Purchase	Purchase - Receipt	☐
Purchase	Purchase - Invoice	☐
Purchase	Purchase - Credit Memo	☐
Purchase	Purchase - Return Shipment	☐
Sales	Sales - Quote	☐
Sales	Sales - Order	☐
Sales	Sales - Shipment	☐
Sales	Sales - Invoice	☐
Sales	Sales - Credit Memo	☐
Sales	Sales - Blanket Order	☐
Sales	Sales - Return Order	☐
Sales	Sales - Return Receipt	☐
Sales	Sales - Pro Forma Invoice	☐
Service	Service - Quote	☐
Service	Service - Order	☐
Service	Service - Item Worksheet	☐
Service	Service - Shipment	☐
Service	Service - Invoice	☐
Service	Service - Credit Memo	☐
Service	Service - Warranty Claim	☐
Reminder	Issued Reminder	☐
Reminder	Reminder	☐

4. To change a field caption for a header field in a report template, click the value under the **Report Area** column in the list that is displayed. For the description below, we have selected the **Sales - Quote** report card.
5. The report card is displayed.
6. Scroll down to the **Custom Report Captions** tab.
7. From the dropdown list under the **Field** column, select the field for which you want to change the field caption.
8. In the input field under the **New Language Code** column, specify the code for the language (for example, **DEU** for German). If you want to change the field caption to your client language, you can omit this field.
9. In the input field under the **New Caption** column, specify the new caption for the field.

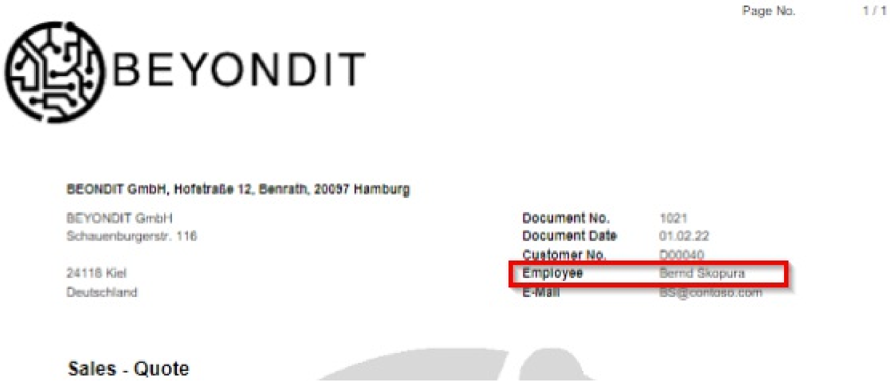
> **NOTE**
>
> **HTML formatting possible**
>
> You can use HTML elements to format field captions, free text, for placeholders and/or words. How to apply these HTML elements and format texts/words with them is described under the corresponding sections under the Use HTML Elements to Format Texts chapter.

NOTE

Use Placeholders in Field Labels

BEYOND Reports allows you to use values of fields in field captions. This feature requires the setup of so-called placeholders for reports. For more information about this, see the Use Placeholders in Field Captions section.

You have edited the field caption.
The displayed report in the preview is automatically updated and shows your change of the field caption.



Next Chapter

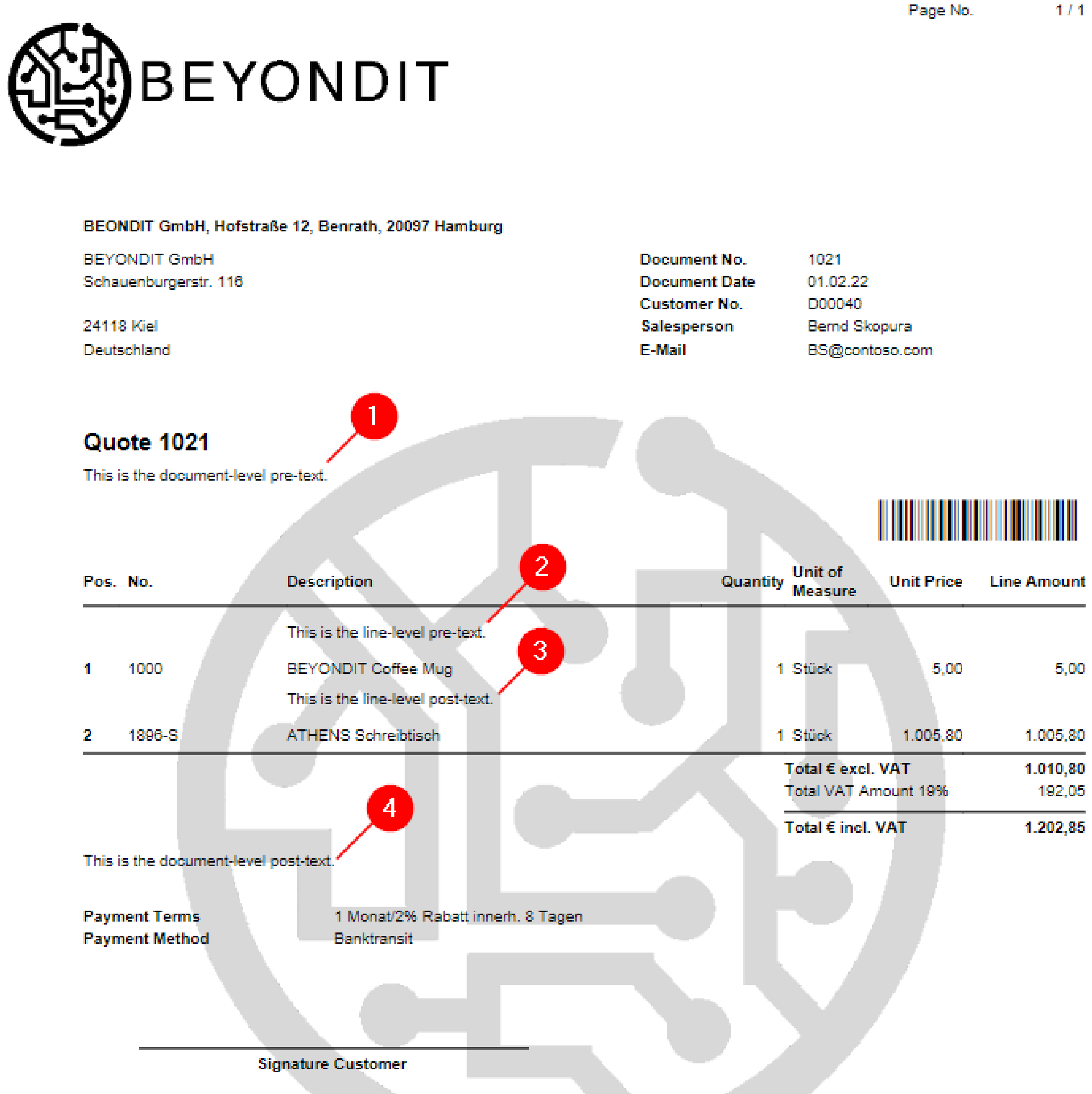
Add Text to Document

This chapter describes how to add one or more texts to a document. These texts can be printed in the report depending on the setup of BEYOND Reports.

> **NOTE**
>
> **Set Print Settings**
>
> The available settings for printing the texts can be found under the associated report card under **BEYOND Reports Setup**. For more information about the print settings, see the Document Header HTML Text and Document Line HTML Text sections.

> **NOTE**
>
> **Placeholders**
>
> You can use placeholders in document texts. Placeholders allow you to reference values of fields in header and footer texts. For **line-level pre-text (2)** and **line-level post-text (3)** **no** placeholders are supported. For more information about placeholders, see the Use Placeholders section.

In BEYOND Reports, a distinction is made between **document-level pre-text (1)**, **line-level pre-text (2)**, **line-level post-text (3)** and **document-level post-text (4)**. Templates (for specific business areas, reports, etc.) can also be defined for these texts. For more information, see the Create HTML Text Templates section.



Page No. 1 / 1

BEYONDIT

BEONDIT GmbH, Hofstraße 12, Benrath, 20097 Hamburg

BEYONDIT GmbH
Schauenburgerstr. 116

24118 Kiel
Deutschland

Document No.	1021
Document Date	01.02.22
Customer No.	D00040
Salesperson	Bernd Skopura
E-Mail	BS@contoso.com

Quote 1021

1

This is the document-level pre-text.

Pos.	No.	Description	Quantity	Unit of Measure	Unit Price	Line Amount
		This is the line-level pre-text. (2)				
1	1000	BEYONDIT Coffee Mug	1	Stück	5,00	5,00
		This is the line-level post-text. (3)				
2	1896-S	ATHENS Schreibtisch	1	Stück	1.005,80	1.005,80

Total € excl. VAT	**1.010,80**
Total VAT Amount 19%	192,05
Total € incl. VAT	**1.202,85**

4

This is the document-level post-text.

Payment Terms	1 Monat/2% Rabatt innerh. 8 Tagen
Payment Method	Banktransit

Signature Customer

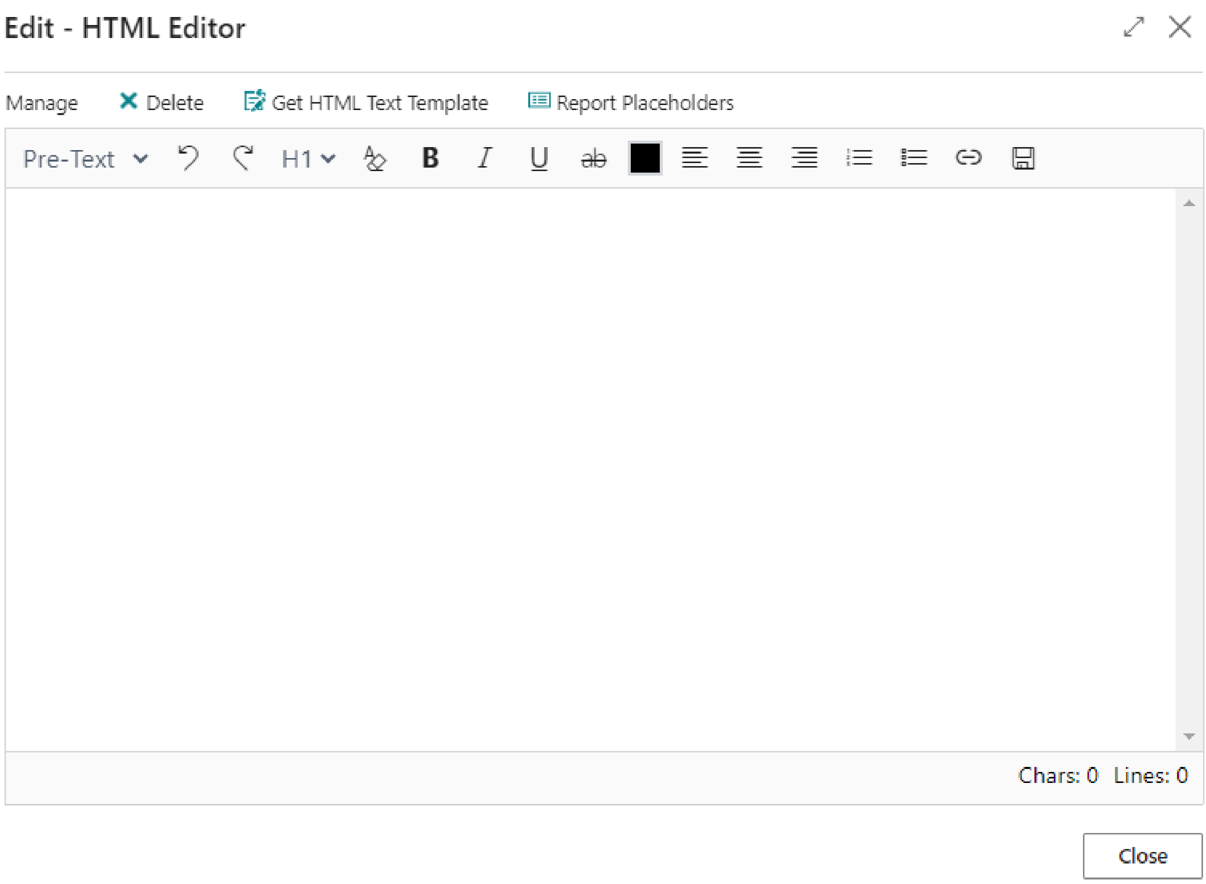
Create Document-Level Pre-Text

This section describes how to create a **document-level pre-text (1)** with an optional placeholder.

For the following description we assume that you have already created a placeholder for the document number as described in the section Create placeholders.

To add a document-level pre-text (in this description for a sales quote), proceed as follows:

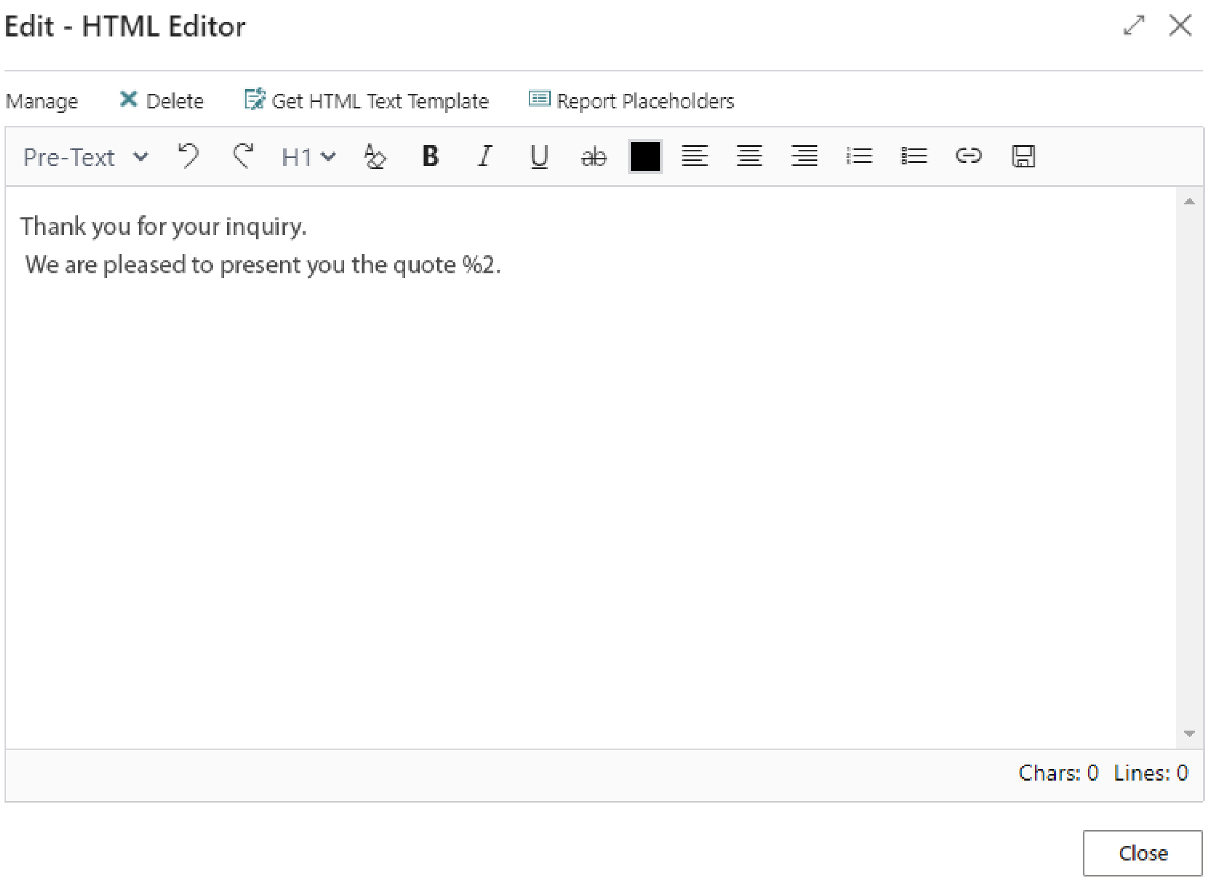
1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) .
3. Search for **Sales Quotes** and click on the corresponding search result. You can use pre- and post-texts for each report type supported by BEYOND Reports.
4. Click on the corresponding document. The document is displayed.
5. Click **Process** > **HTML Editor** in the menu bar.
6. The HTML Editor is displayed.



7. Using the drop-down menu you can determine whether you want to enter a pre-text (**Pre-Text** option) or a post-text (**Post-Text** option) for the document. You can enter both types of texts. We enter only a pre-text in this description.
8. Enter the text (with the placeholders) in the input field. The following options are available for styling the text:

Button	Description
↶	This option allows you to **undo** changes to the formatting of the entered text.
↷	This option allows you to **repeat** changes to the formatting of the entered text after previously undoing them.
H1	This option allows you to format a **headline** in the text. You have 6 predefined heading levels to choose from.
	This option allows you delete a formatting for a text. Select the text for which you want to **delete the formatting** and click on this button.
B	With this option you can format text in **bold**. Select the text for which you want to use **bold formatting** and click on this button.
I	With this option you can format text in **italic**. Select the text for which you want to use **italic formatting** and click on this button.
U	With this option you can **underline** text. Select the text for which you want to use **underlined formatting** and click on this button.
~~ab~~	With this option you can **cross out** text. Select the text which you want to **cross out** and click on this button.
■	With this option you can **color** text. Select the text which you want to **color**, click on this icon and choose a color.
	With this option you can **left-justify** text. Select the text which you want to **left-justify** and click on this button.
	With this option you can **center-justify** text. Select the text which you want to **center-justify** and click on this button.
	With this option you can **right-justify** text. Select the text which you want to **right-justify** and click on this button.
	This button allows you to format text with a **numbering**. Select the text you want to format with a numbering and click this button.
	This button allows you to format text as **enumeration**. Select the text you want to format as a bulleted list and click this button.
	This button allows you to format text as a **link**. Markieren Sie den Text, den Sie als Link formatieren möchten und klicken Sie auf diese Schaltfläche. Note that you can only format text as a link if it begins with **http://**, **https://**, or **www.** and ends with a top-level domain (e.g. .de, .com, etc.).
	This button is used to **save** any changes to the text.

9. In our example we have entered the following text in the editor window:
   Thank you for your inquiry.
   We are pleased to present you the quote %2.
   The placeholder **%2** references the document number (only in sales quotes). For more information about placeholders see Use Placeholders chapter.



10. To save your text click the **Save** icon in the menu bar.
11. To close the HTML editor and to return to the document card, click **Close**.

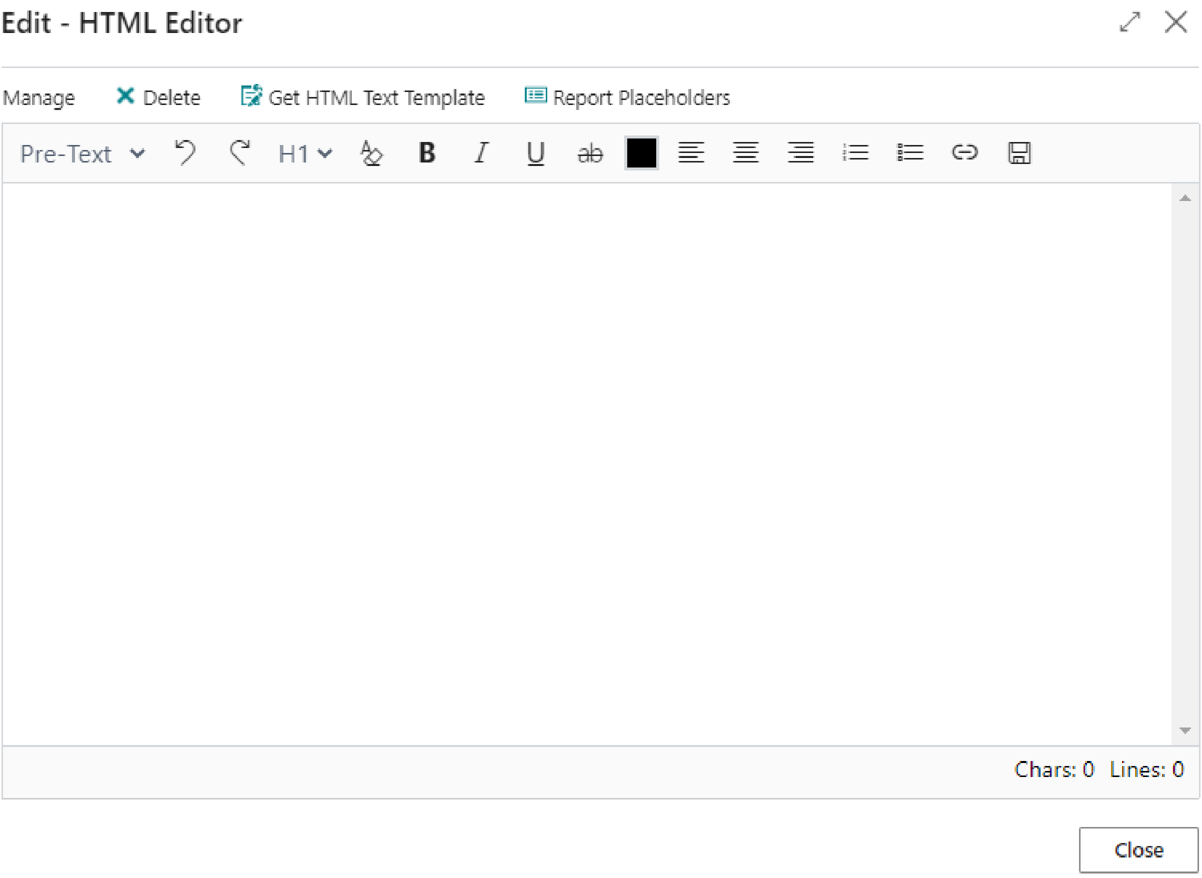
You have created a document-specific pre-text with a placeholder. This text will be used exclusively for this particular report. For more information on how to create texts that will be used for all documents of a document type, see the Create HTML Text Template chapter. The text templates can be loaded into the HTML editor window using the **Get HTML Text Template** button.

Create Document-Level Post-Text

This section describes how to create a **Document-Level Post-Text (4)**.

To add a document-level post-text to a document (in this description for a sales quote), proceed as follows:

1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) ▯.
3. Search for **Sales Quotes** and click on the corresponding search result. You can use pre- and post-texts for each report type supported by BEYOND Reports.
4. Click on the corresponding document. The document is displayed.
5. Click **Process** > **HTML Editor** in the menu bar.
6. The HTML Editor is displayed.



7. Using the dropdown menu you can determine whether you want to enter a pre-text (**Pre-Text** option) or a post-text (**Post-Text** option) for the document. You can enter both types of texts. We will only enter a post-text in this description. The **Get HTML Text Template** button allows you to select from available text templates. For more information about HTML Text Templates, see the Create HTML text templates section.
8. Enter the text in the input field. Placeholders can be used in post-texts. The following options are available for designing the text:

Button	Description
	This option allows you to **undo** changes to the formatting of the entered text.
	This option allows you to **repeat** changes to the formatting of the entered text after previously undoing them.
H1	This option allows you to format a **headline** in the text. You have 6 predefined heading levels to choose from.
	This option allows you delete a formatting for a text. Select the text for which you want to **delete the formatting** and click on this button.
B	With this option you can format text in **bold**. Select the text for which you want to use **bold formatting** and click on this button.
I	With this option you can format text in **italic**. Select the text for which you want to use **italic formatting** and click on this button.
U	With this option you can **underline** text. Select the text for which you want to use **underlined formatting** and click on this button.
~~ab~~	With this option you can **cross out** text. Select the text which you want to **cross out** and click on this button.
	With this option you can **color** text. Select the text which you want to **color**, click on this icon and choose a color.
	With this option you can **left-justify** text. Select the text which you want to **left-justify** and click on this button.
	With this option you can **center-justify** text. Select the text which you want to **center-justify** and click on this button.
	With this option you can **right-justify** text. Select the text which you want to **right-justify** and click on this button.
	This button allows you to format text with a **numbering**. Select the text you want to format with a numbering and click this button.
	This button allows you to format text as **enumeration**. Select the text you want to format as a bulleted list and click this button.
	This button allows you to format text as a **link**. Markieren Sie den Text, den Sie als Link formatieren möchten und klicken Sie auf diese Schaltfläche. Note that you can only format text as a link if it begins with **http://**, **https://**, or **www.** and ends with a top-level domain (e.g. .de, .com, etc.).
	This button is used to **save** any changes to the text.

9. To save your text click the **Save** icon in the menu bar.
10. To close the HTML editor and to return to the document card, click **Close**.

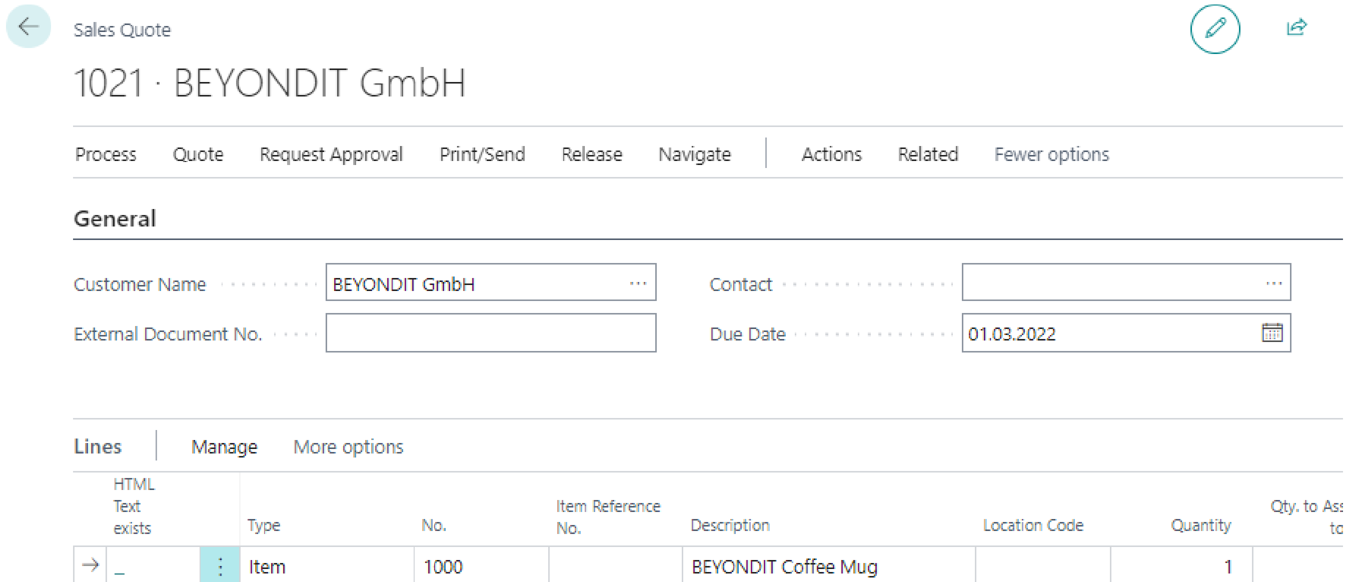
You have created a document-level post-text. This text will be used exclusively for this particular report. For more information on how to create texts that are used for all documents of a document type, see the Create HTML Text Templates chapter.

Create Line-Level Pre-Text

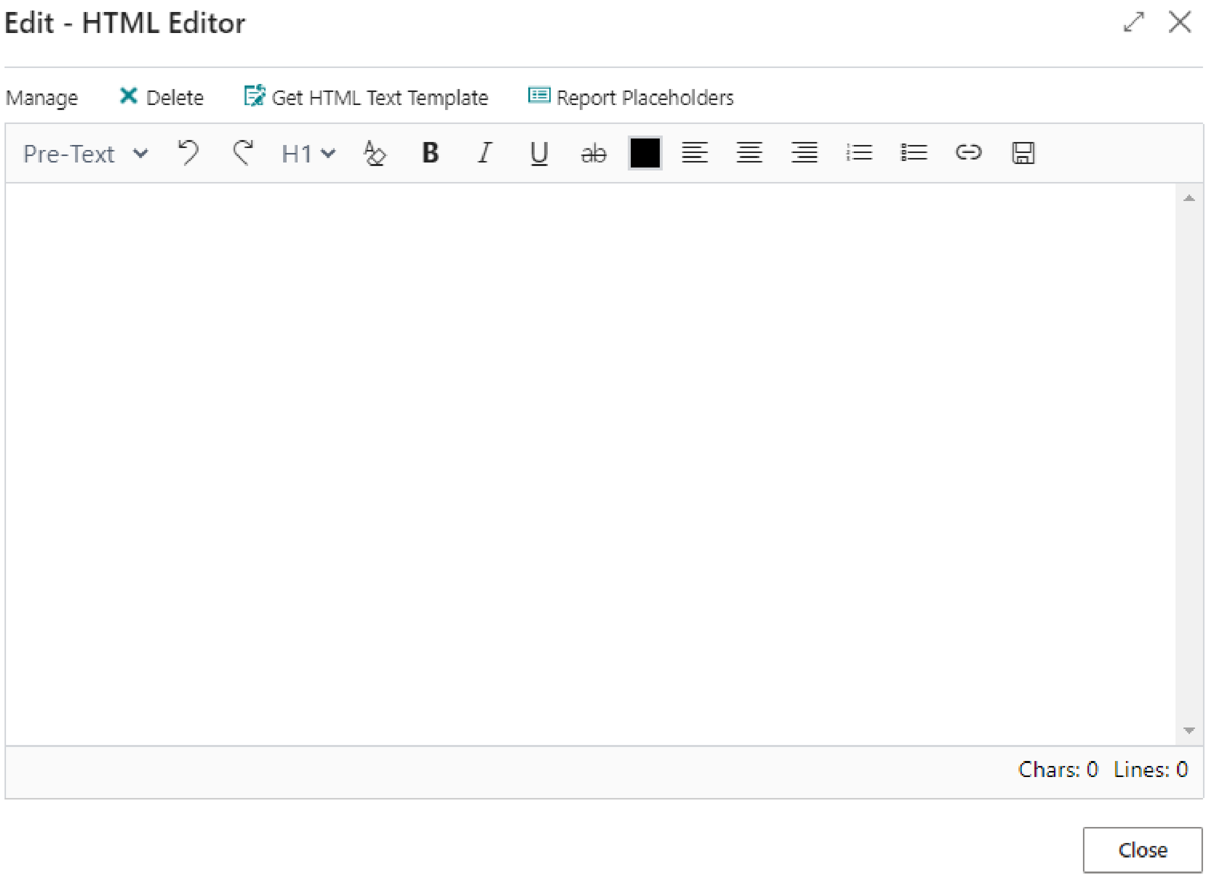
This section describes how to create a **line-level pre-text (2)**.

To add a line-level pre-text (to a sales quote), proceed as follows:

1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) .
3. Search for **Sales Quotes** and click on the corresponding search result. You can use pre- and post-texts for each report type supported by BEYOND Reports.
4. Click on the corresponding document. The document is displayed.



5. In the **Lines** tab the column **HTML Text exists** is displayed. In this column, symbols indicate whether no, one or more HTML text(s) are stored for a line:
   —: If no symbol is displayed in the column, neither a pre-text nor a post-text is stored for the line.
   : If the icon with the green area at the top is displayed, a pre-text is stored for the line.
   : If the icon with the green area at the top is displayed, a post-text is stored for the line.
   : If both symbols are displayed, a pre-text and a post-text are stored for the line.
6. Click the displayed icon in the column.
7. The HTML editor is displayed.



8. Using the dropdown menu you can determine whether you want to enter a pre-text (**Pre-Text** option) or a post-text (**Post-Text** option) for the document. You can enter both types of texts. We will enter only a pre-text in this description. You can select from available text templates using the **Get HTML Text Template** button. For more information about HTML text templates, see the Create HTML text templates section.
9. Enter the text in the input field. You can use the following options to format the text:

Button	Description
	This option allows you to **undo** changes to the formatting of the entered text.
	This option allows you to **repeat** changes to the formatting of the entered text after previously undoing them.
H1	This option allows you to format a **headline** in the text. You have 6 predefined heading levels to choose from.
	This option allows you delete a formatting for a text. Select the text for which you want to **delete the formatting** and click on this button.
B	With this option you can format text in **bold**. Select the text for which you want to use **bold formatting** and click on this button.
I	With this option you can format text in **italic**. Select the text for which you want to use **italic formatting** and click on this button.
U	With this option you can **underline** text. Select the text for which you want to use **underlined formatting** and click on this button.
~~ab~~	With this option you can **cross out** text. Select the text which you want to **cross out** and click on this button.
	With this option you can **color** text. Select the text which you want to **color**, click on this icon and choose a color.
	With this option you can **left-justify** text. Select the text which you want to **left-justify** and click on this button.
	With this option you can **center-justify** text. Select the text which you want to **center-justify** and click on this button.
	With this option you can **right-justify** text. Select the text which you want to **right-justify** and click on this button.
	This button allows you to format text with a **numbering**. Select the text you want to format with a numbering and click this button.
	This button allows you to format text as **enumeration**. Select the text you want to format as a bulleted list and click this button.
	This button allows you to format text as a **link**. Markieren Sie den Text, den Sie als Link formatieren möchten und klicken Sie auf diese Schaltfläche. Note that you can only format text as a link if it begins with **http://**, **https://**, or **www.** and ends with a top-level domain (e.g. .de, .com, etc.).
	This button is used to **save** any changes to the text.

10. To save your text click the **Save** icon  in the menu bar.
11. To close the HTML editor and to return to the document card, click **Close**.

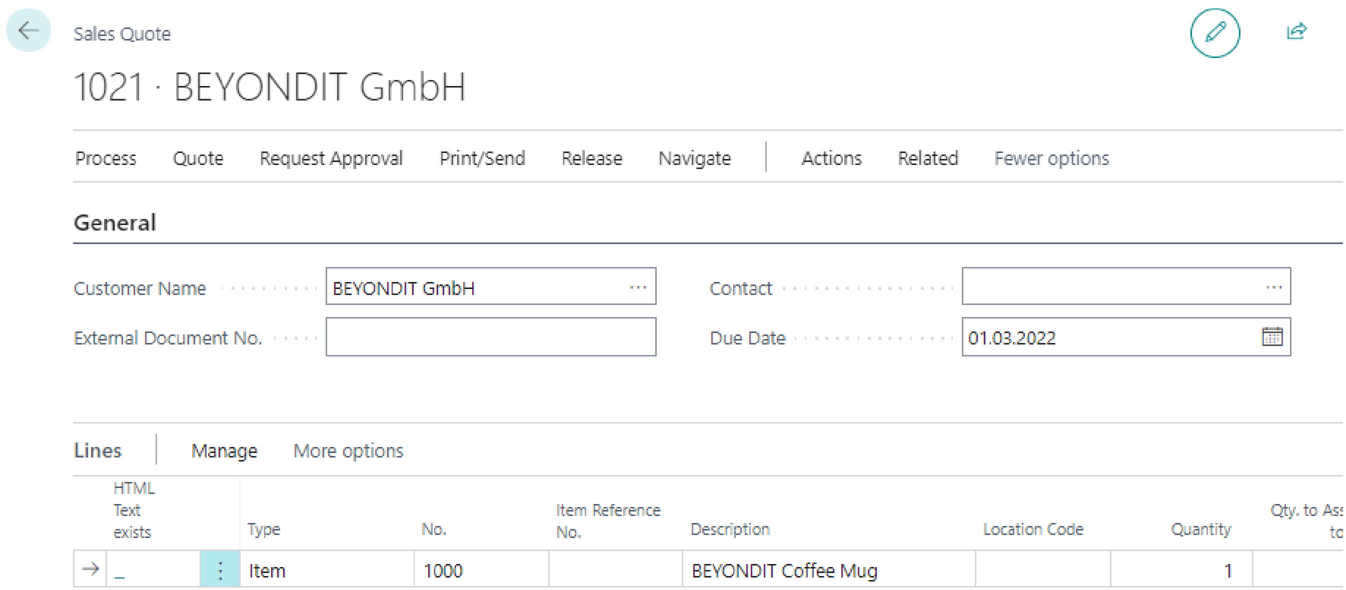
You have added a line-level pre-text to a document.

Create Line-Level Post-Text

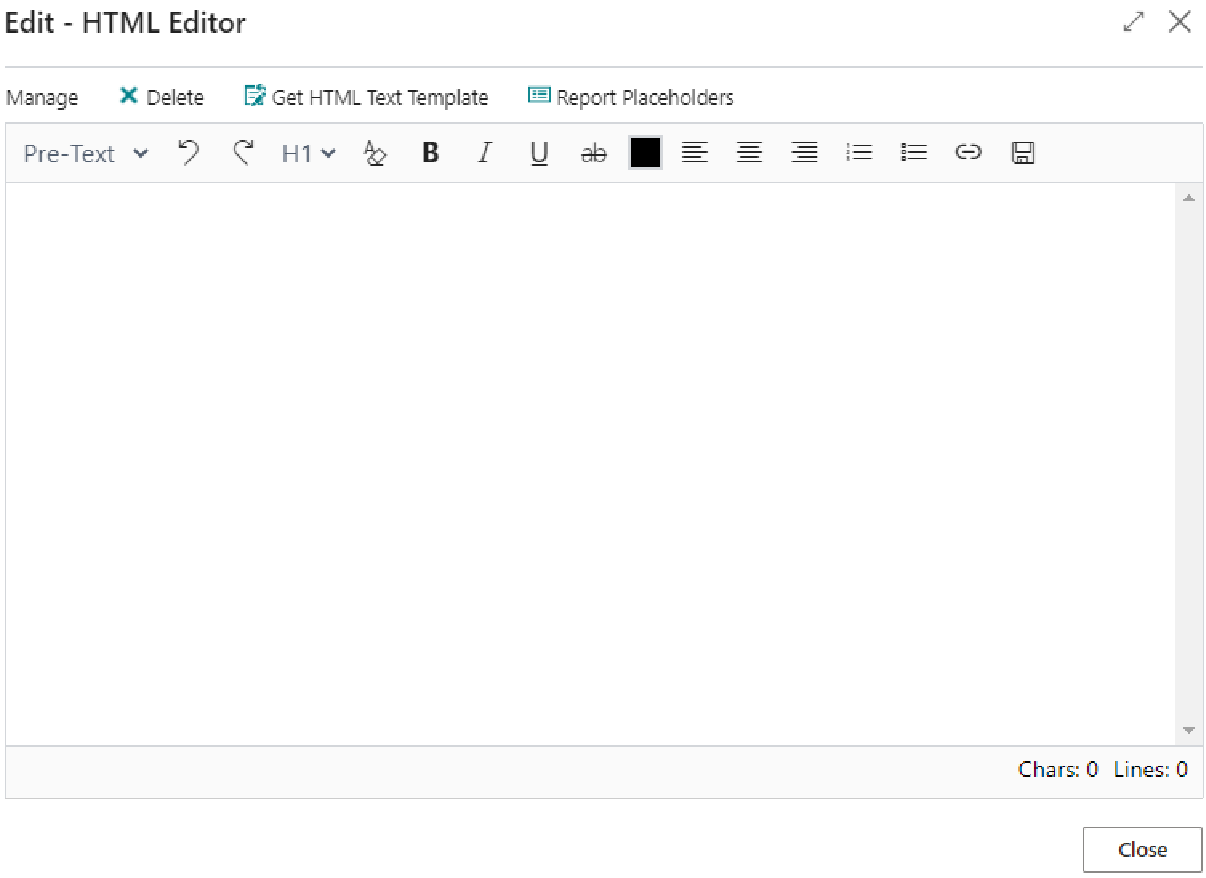
This section describes how to create a **line-level post-text (3)**.

To add a line-level post-text (in this description for a sales quote), proceed as follows:

1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) 🔍.
3. Search for **Sales Quotes** and click on the corresponding search result. You can use pre- and post-texts for each report type supported by BEYOND Reports.
4. Click on the corresponding document. The document is displayed.



5. In the **Lines** tab the column **HTML Text exists** is displayed. In this column, symbols indicate whether no, one or more HTML text(s) are stored for a line:
   _: If no symbol is displayed in the column, neither a pre-text nor a post-text is stored for the line.
   : If the icon with the green area at the top is displayed, a pre-text is stored for the line.
   : If the icon with the green area at the top is displayed, a post-text is stored for the line.
   : If both symbols are displayed, a pre-text and a post-text are stored for the line.
6. Click the displayed icon in the column.
7. The HTML editor is displayed.



8. Using the dropdown menu you can determine whether you want to enter a pre-text (**Pre-Text** option) or a post-text (**Post-Text** option) for the document. You can enter both types of texts. We will enter only a post-text in this description. You can select from available text templates using the **Get HTML Text Template** button. For more information about HTML text templates, see the Create HTML text templates section.
9. Enter the text in the input field. You can use the following options to format the text:

Button	Description
↶	This option allows you to **undo** changes to the formatting of the entered text.
↷	This option allows you to **repeat** changes to the formatting of the entered text after previously undoing them.
H1	This option allows you to format a **headline** in the text. You have 6 predefined heading levels to choose from.
	This option allows you delete a formatting for a text. Select the text for which you want to **delete the formatting** and click on this button.
B	With this option you can format text in **bold**. Select the text for which you want to use **bold formatting** and click on this button.
I	With this option you can format text in **italic**. Select the text for which you want to use **italic formatting** and click on this button.
U	With this option you can **underline** text. Select the text for which you want to use **underlined formatting** and click on this button.
~~ab~~	With this option you can **cross out** text. Select the text which you want to **cross out** and click on this button.
■	With this option you can **color** text. Select the text which you want to **color**, click on this icon and choose a color.
	With this option you can **left-justify** text. Select the text which you want to **left-justify** and click on this button.
	With this option you can **center-justify** text. Select the text which you want to **center-justify** and click on this button.
	With this option you can **right-justify** text. Select the text which you want to **right-justify** and click on this button.
	This button allows you to format text with a **numbering**. Select the text you want to format with a numbering and click this button.
	This button allows you to format text as **enumeration**. Select the text you want to format as a bulleted list and click this button.
	This button allows you to format text as a **link**. Markieren Sie den Text, den Sie als Link formatieren möchten und klicken Sie auf diese Schaltfläche. Note that you can only format text as a link if it begins with **http://**, **https://**, or **www.** and ends with a top-level domain (e.g. .de, .com, etc.).
	This button is used to **save** any changes to the text.

10. To save your text click the **Save** icon in the menu bar.
11. To close the HTML editor and to return to the document card, click **Close**.

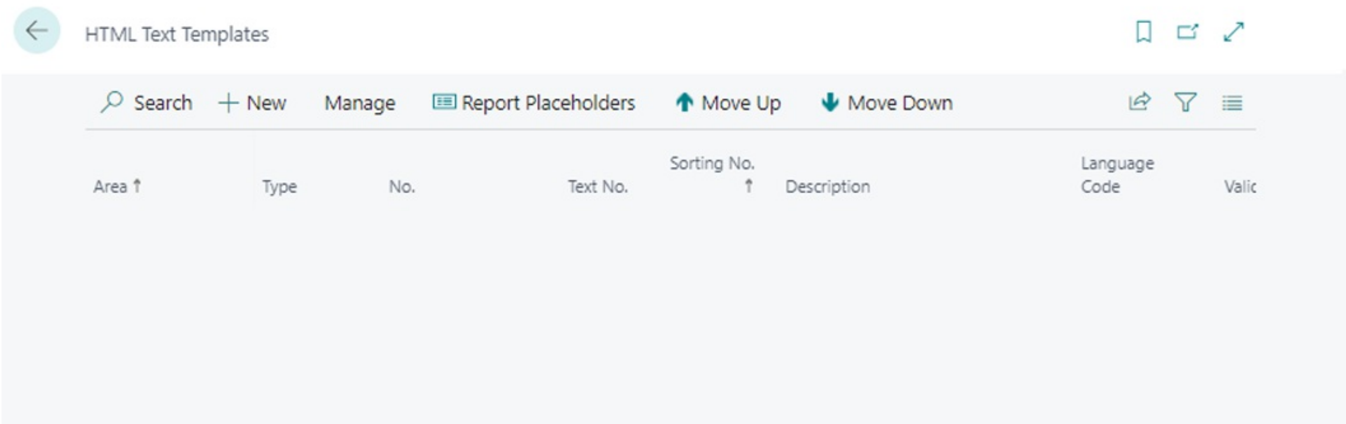
You have added a line-level post-text to a document.

Create HTML Text Template

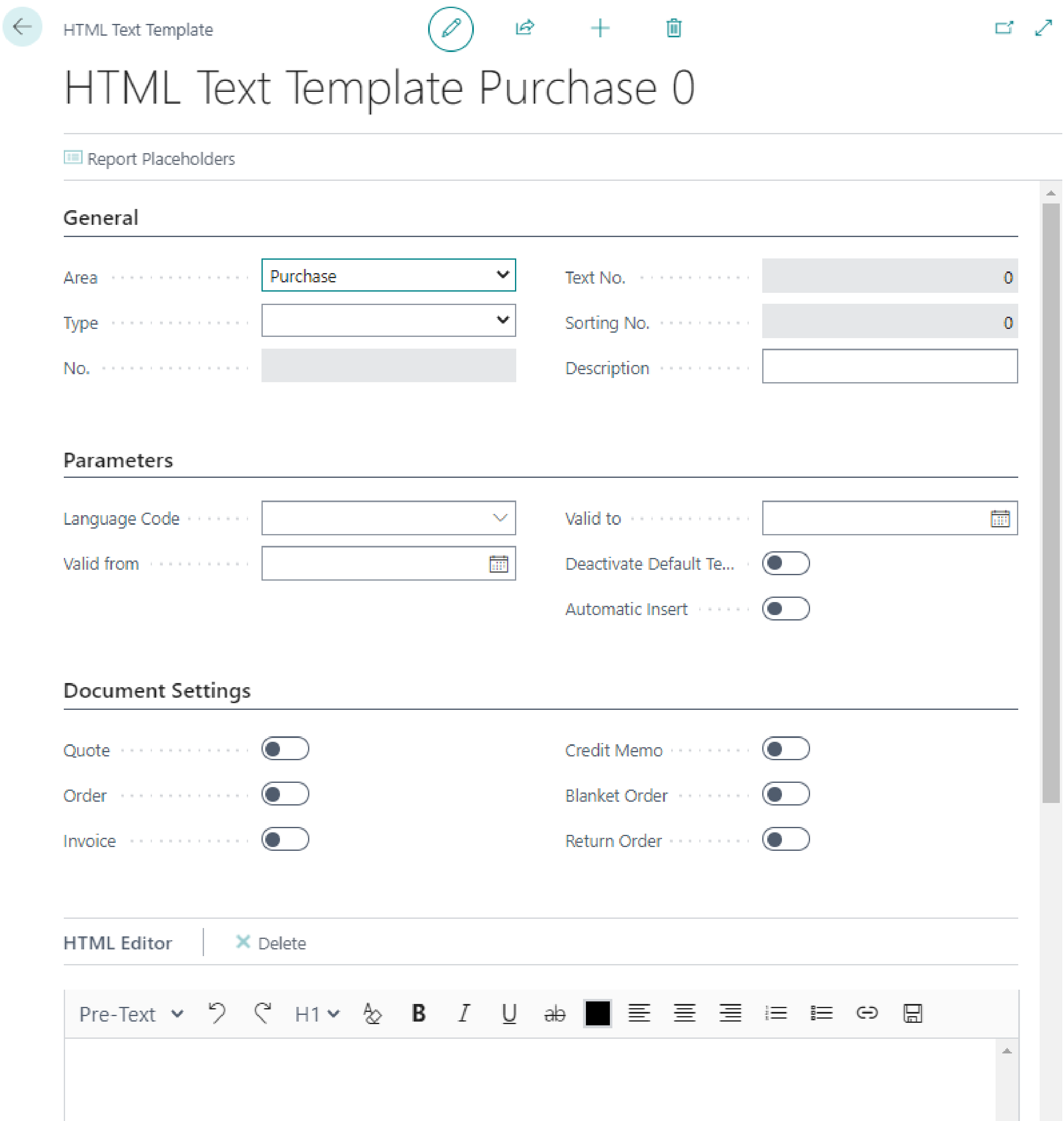
This section describes how to create an HTML text template. You can use BEYOND Reports to create HTML text templates that are automatically used for supported reports of the defined business areas, specific vendors/customers/items or a combination of these elements. It is also possible to define a date from or until which a text template will be used automatically by specifying a start and end date.

To create an HTML text template, proceed as follows:

1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) .
3. Search for **HTML Text Templates** and click on the corresponding search result.
4. The **HTML Text Templates** page is displayed.



5. To create a new HTML Text Template, click **New** from the menun bar.
6. The **HTML Text Template** card is displayed.



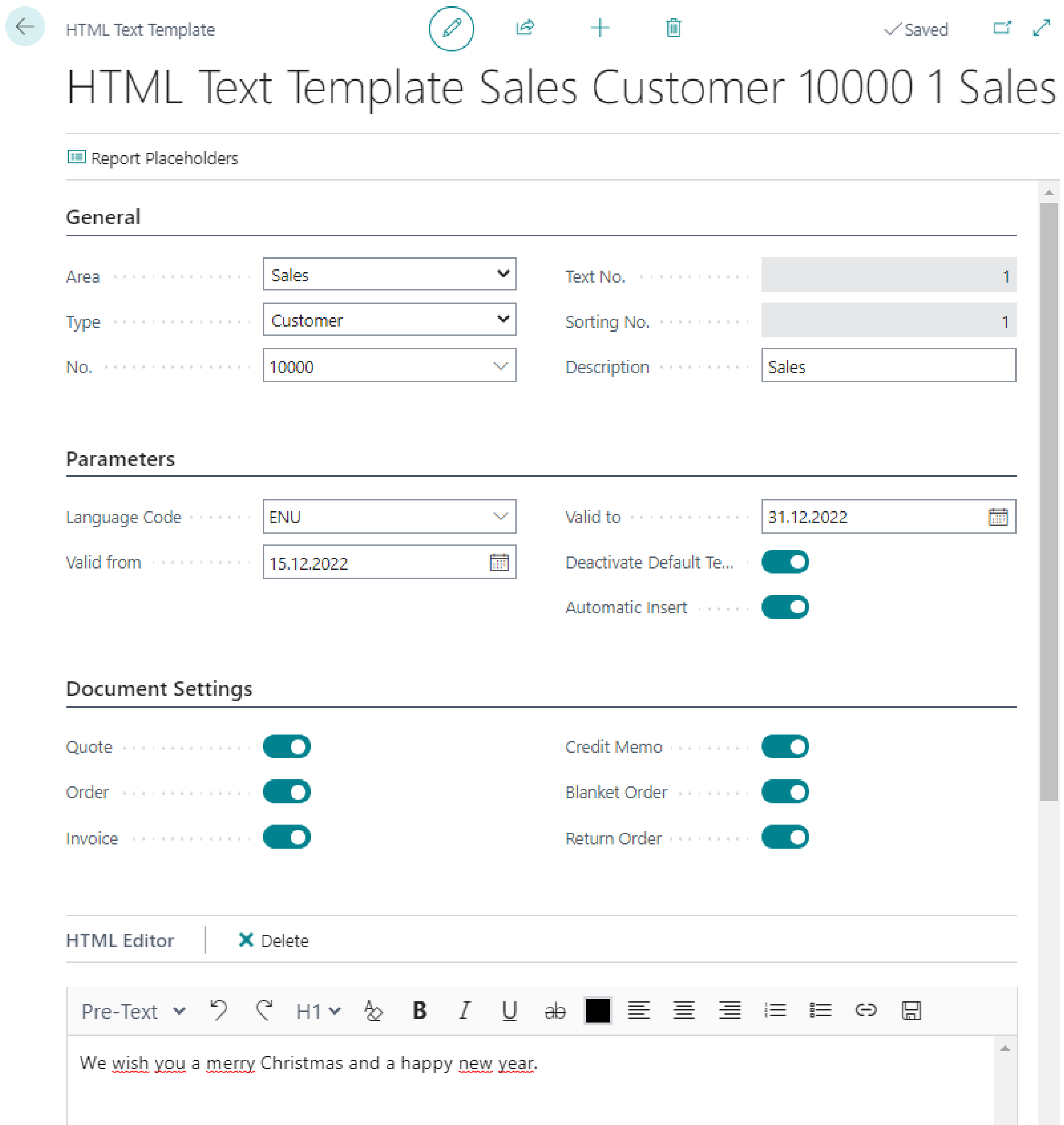
7. Define the scope of the HTML text template using the options in the **General** area:

Field	Description
Area	From the dropdown list choose the value for the **Area** field: **Purchase**: The text template is used for purchase documents. **Sales**:The text template is used for sales documents. **Service**: The text template is used for service documents.
Type	In addition to setting the (business) area, you can additionally define that the HTML text template should be used when a specific **vendor**, **customer** or **item** is used in the report.
No.	Enter the corresponding vendor, customer or item number in this input field (if you have further limited the use of the HTML text template under the **General** area in the Type field).
Text No.	In this field you enter the ID number for the text.
Sorting No.	In this field you specify the sorting number for the sequence in case of multiple texts/HTML text templates. Here, the value **1** corresponds to the first position in the sequence.
Description	In this field you enter a description for the HTML text template.

8. Define the other parameters for the usage of the HTML text template:

Field	Description
Language Code	In this field you define the language for the HTML text template.
Valid from	In this field you define the start date for the usage of the HTML text template.
Valid to	In this field you define the end date for the usage of the HTML text template.
Deactivate Deafult Template	Use this slider to specify whether to disable default report templates.
Automatic Insert	This slider allows you to define whether the HTML text template should be used automatically.

9. Use the sliders under the **Document settings** area to define for which document types the HTML text template should be used.
10. Under the **HTML Editor** area you can define a pre-text as well as a post-text for the HTML text template.



11. Using the dropdown list you can determine whether you want to enter a pre-text (**Pre-Text** option) or a post-text (**Post-Text** option) for the document. You can enter both types of texts.
12. Enter the text in the input field. You can use the following options to format the text:

Button	Description
↶	This option allows you to **undo** changes to the formatting of the entered text.
↷	This option allows you to **repeat** changes to the formatting of the entered text after previously undoing them.
H1	This option allows you to format a **headline** in the text. You have 6 predefined heading levels to choose from.
	This option allows you delete a formatting for a text. Select the text for which you want to **delete the formatting** and click on this button.
B	With this option you can format text in **bold**. Select the text for which you want to use **bold formatting** and click on this button.
I	With this option you can format text in **italic**. Select the text for which you want to use **italic formatting** and click on this button.
U	With this option you can **underline** text. Select the text for which you want to use **underlined formatting** and click on this button.
~~ab~~	With this option you can **cross out** text. Select the text which you want to **cross out** and click on this button.
■	With this option you can **color** text. Select the text which you want to **color**, click on this icon and choose a color.
	With this option you can **left-justify** text. Select the text which you want to **left-justify** and click on this button.
	With this option you can **center-justify** text. Select the text which you want to **center-justify** and click on this button.
	With this option you can **right-justify** text. Select the text which you want to **right-justify** and click on this button.
	This button allows you to format text with a **numbering**. Select the text you want to format with a numbering and click this button.
	This button allows you to format text as **enumeration**. Select the text you want to format as a bulleted list and click this button.
	This button allows you to format text as a **link**. Markieren Sie den Text, den Sie als Link formatieren möchten und klicken Sie auf diese Schaltfläche. Note that you can only format text as a link if it begins with **http://**, **https://**, or **www.** and ends with a top-level domain (e.g. .de, .com, etc.).
	This button is used to **save** any changes to the text.

13. To save your text click the **Save** icon in the menu bar.

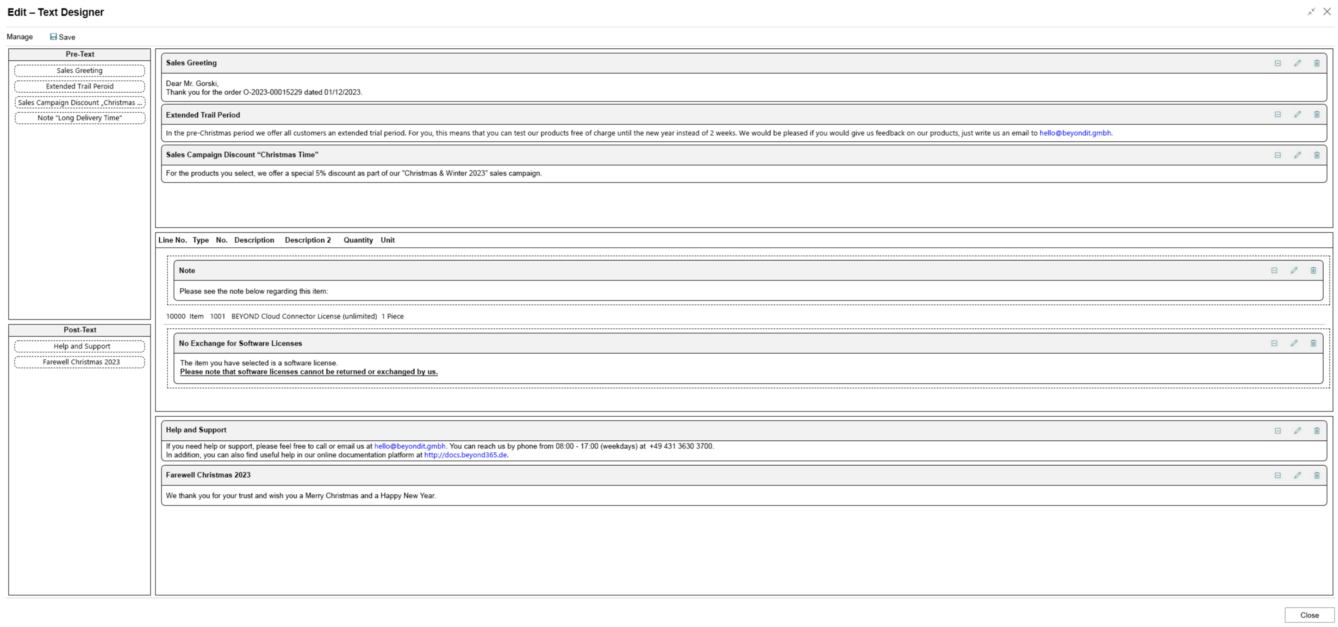
You have created an HTML text template. This can be loaded into the HTML editor for documents (if the template settings on the HTML text template card are set correctly) via the **Get HTML Text Template** button.

Use Text Designer

This section describes how to use the text designer. The text designer allows you to manage the texts used in the document (document-level pre-texts and post-texts for documents, line-level pre-texts and post-texts, and the available HTML text templates) quickly and easily.

Follow these steps to manage texts for a document using the text designer:

1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) .
3. Search for the **Sale Quotes** page (or any other corresponding document page) and click the search result. You can use the text designer for any report type supported by BEYOND Reports.
4. Click on the corresponding document. The document card is displayed.
5. Click **Process** > **Text Designer** in the menu bar.
6. The **Text Designer** window is displayed.



7. The available HTML text templates are displayed on the left edge of the window. You can drag and drop (click and drag) the HTML text templates into the document.
8. HTML text templates already present in the document (right side of the window) can be edited, deleted or their order changed.

> **NOTE**
>
> **HTML formatting possible**
>
> You can use HTML elements to format field captions, free text, placeholders and/or words. How to use these HTML elements and format texts/words with them is described under the corresponding sections under the chapter Use HTML Elements to Format Texts.

Next Chapter

Add Free Text to Report Template

This chapter describes how to add a free text to the report. You can use HTML elements in these free texts.
The contents of this chapter are divided into the following sections:

- Create Free Text
- Place Free Text in Report

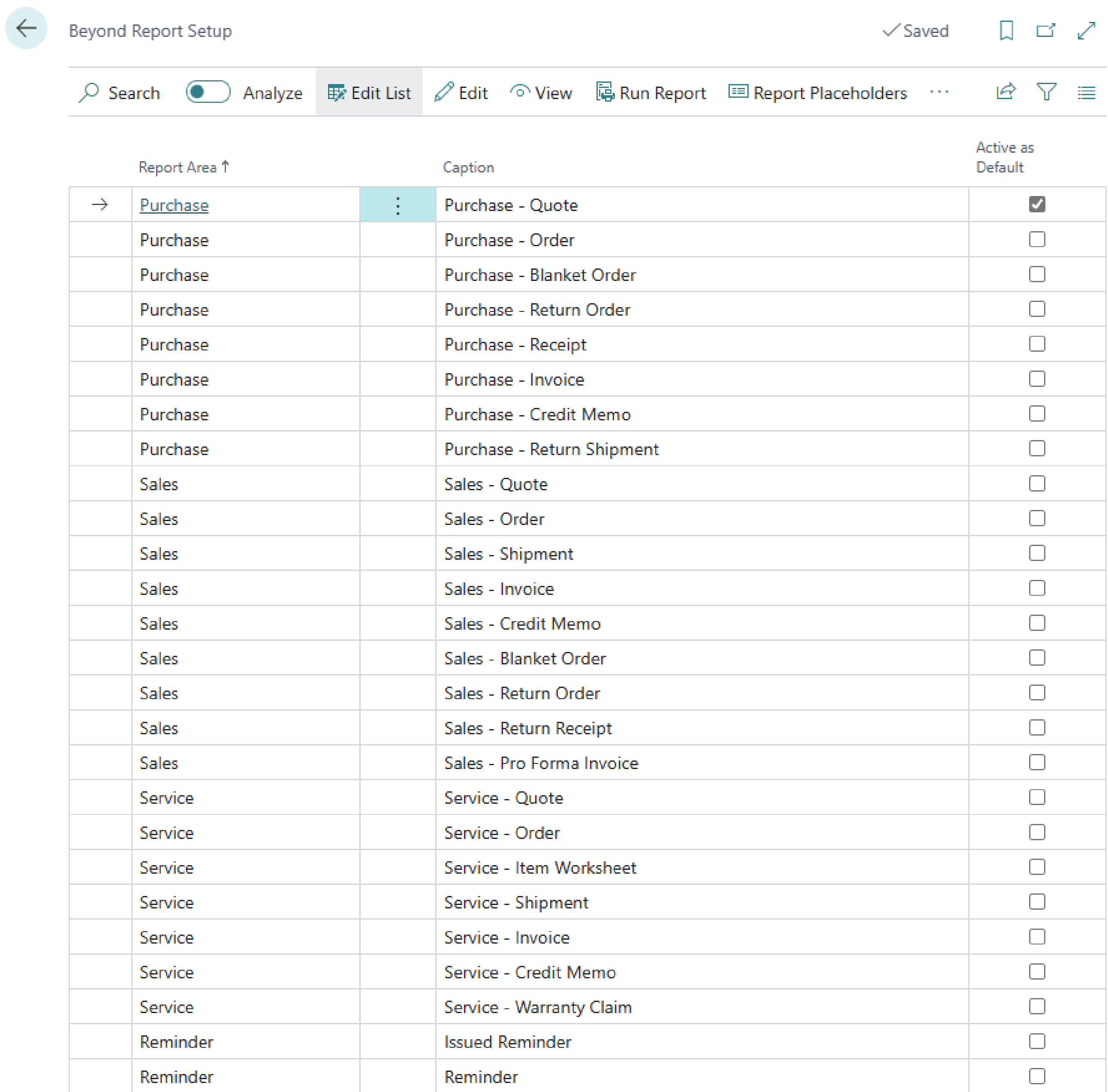
Create Free Text

This section describes how to create a free text and use it in a report template.

> **NOTE**
>
> **Placeholders**
> You can use placeholders in the free texts. Placeholders allow you to reference values of fields from the report in free texts. For more information about placeholders, see the Use Placeholders section.

To create a free text, proceed as follows:

1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) .
3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.



Report Area	Caption	Active as Default
Purchase	Purchase - Quote	☑
Purchase	Purchase - Order	☐
Purchase	Purchase - Blanket Order	☐
Purchase	Purchase - Return Order	☐
Purchase	Purchase - Receipt	☐
Purchase	Purchase - Invoice	☐
Purchase	Purchase - Credit Memo	☐
Purchase	Purchase - Return Shipment	☐
Sales	Sales - Quote	☐
Sales	Sales - Order	☐
Sales	Sales - Shipment	☐
Sales	Sales - Invoice	☐
Sales	Sales - Credit Memo	☐
Sales	Sales - Blanket Order	☐
Sales	Sales - Return Order	☐
Sales	Sales - Return Receipt	☐
Sales	Sales - Pro Forma Invoice	☐
Service	Service - Quote	☐
Service	Service - Order	☐
Service	Service - Item Worksheet	☐
Service	Service - Shipment	☐
Service	Service - Invoice	☐
Service	Service - Credit Memo	☐
Service	Service - Warranty Claim	☐
Reminder	Issued Reminder	☐
Reminder	Reminder	☐

4. To change a description for a report header field in a report template, click the value under the **Report Area** column in the list that is displayed. For the description below, we have selected the **Sales - Quote** report card.
5. The report card is displayed.
6. Scroll down to the **Custom Report Captions** tab.
7. From the dropdown menu under the **Field** column, select **Free Text**.
8. In the input field under the **New Language Code** column, specify the code for the language (for example, **DEU** for German). If you want to change the field label for your client language, you can omit this field.
9. Enter the free text in the input field under the **New Caption** column.

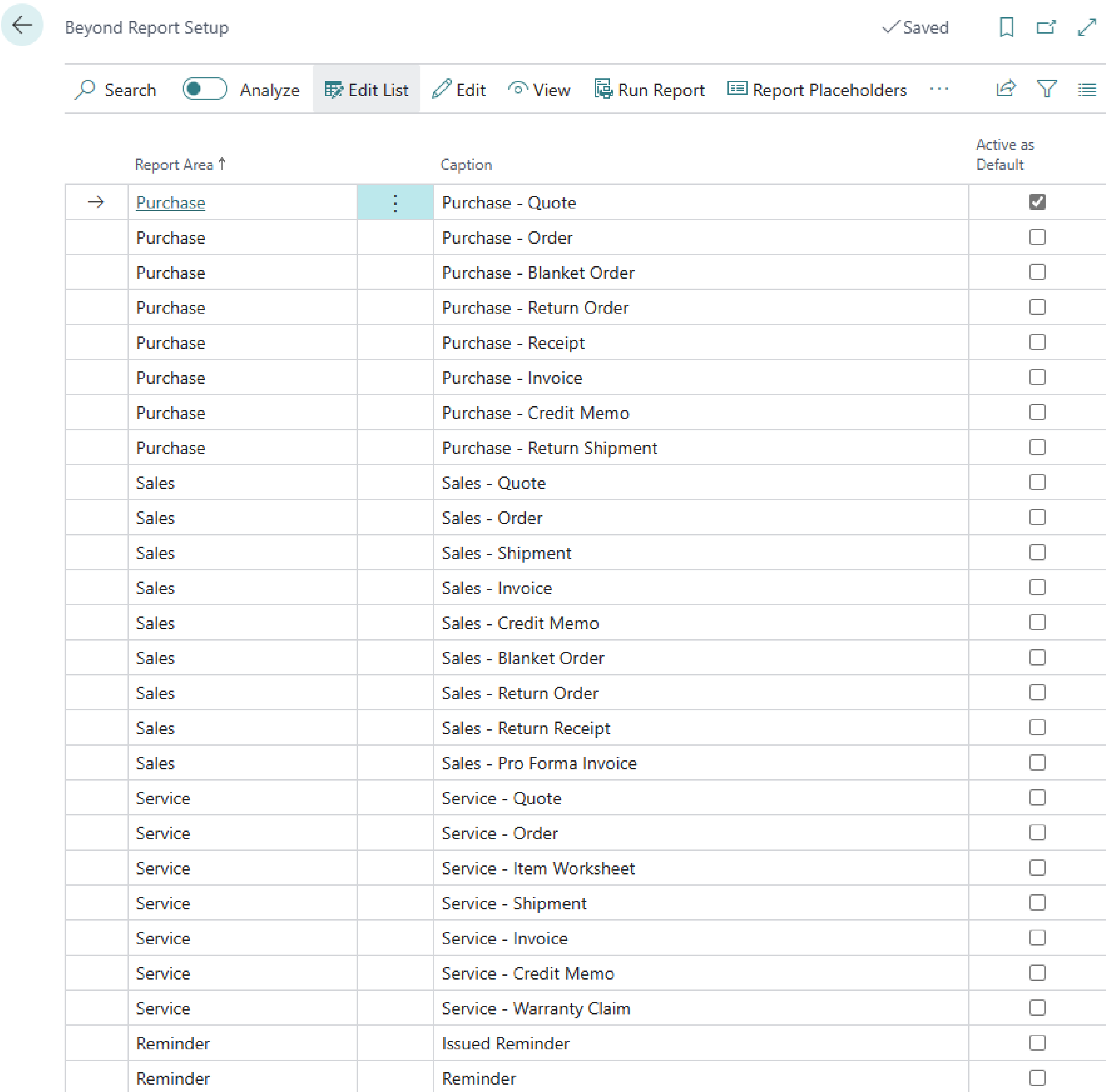
> **NOTE**
>
> **HTML formatting is possible**
>
> You can use HTML elements to format field captions, free text, for placeholders and/or words. How to use these HTML elements and format texts/words with them is described under the corresponding sections under the chapter Using HTML Elements to Format Texts.

You have created a free text. In order for the free text to be displayed in reports, you must place it in a report area. For more information, see the section Place free text in report.

Place Free Text in Report

This section describes how to place a free text in a report after you have created a free text.
To place a free text, do the following:

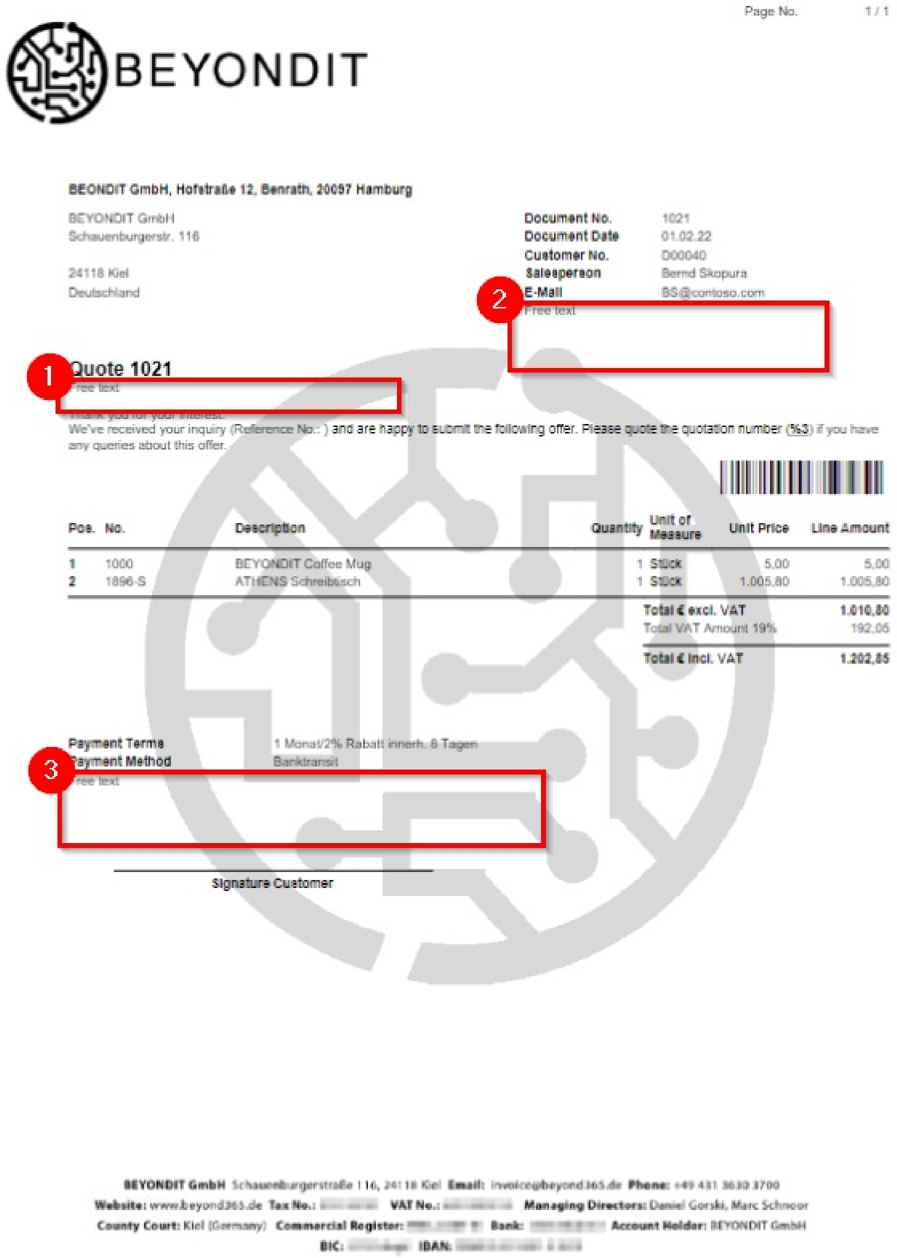
1. Open your Business Central.
2. From the Role Center, open the search (**ALT+Q**) ⎕.
3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.



Report Area ↑	Caption	Active as Default
Purchase	Purchase - Quote	☑
Purchase	Purchase - Order	☐
Purchase	Purchase - Blanket Order	☐
Purchase	Purchase - Return Order	☐
Purchase	Purchase - Receipt	☐
Purchase	Purchase - Invoice	☐
Purchase	Purchase - Credit Memo	☐
Purchase	Purchase - Return Shipment	☐
Sales	Sales - Quote	☐
Sales	Sales - Order	☐
Sales	Sales - Shipment	☐
Sales	Sales - Invoice	☐
Sales	Sales - Credit Memo	☐
Sales	Sales - Blanket Order	☐
Sales	Sales - Return Order	☐
Sales	Sales - Return Receipt	☐
Sales	Sales - Pro Forma Invoice	☐
Service	Service - Quote	☐
Service	Service - Order	☐
Service	Service - Item Worksheet	☐
Service	Service - Shipment	☐
Service	Service - Invoice	☐
Service	Service - Credit Memo	☐
Service	Service - Warranty Claim	☐
Reminder	Issued Reminder	☐
Reminder	Reminder	☐

4. To place a free text in a report template, click the value under the **Report Area** column in the list that is displayed. For the description below, we have selected the **Sales - Quote** report card.
5. The report card is displayed.
6. Scroll down to the **Field Placement** tab.
7. From the dropdown menu, select the area where you want to add the free text:

- **Top Left** (1): Select this area to place the free text at the top left.
- **Top Right** (2): Select this area to place the free text at the top right.
- **Bottom** (3): Select this area to place the free text at the bottom.



Page No. 1 / 1

BEONDIT GmbH, Hofstraße 12, Benrath, 20057 Hamburg

BEYONDIT GmbH
Schauenburgerstr. 116

24118 Kiel
Deutschland

Document No. 1021
Document Date 01.02.22
Customer No. D00040
Salesperson Bernd Skopura
E-Mail BS@contoso.com
Free text

2

1

Quote 1021

Free text

Thank you for your interest.
We've received your inquiry (Reference No.:) and are happy to submit the following offer. Please quote the quotation number (%3) if you have any queries about this offer.

Pos.	No.	Description	Quantity	Unit of Measure	Unit Price	Line Amount
1	1000	BEYONDIT Coffee Mug	1	Stück	5,00	5,00
2	1896-S	ATHENS Schreibtisch	1	Stück	1.005,80	1.005,80

Total € excl. VAT 1.010,80
Total VAT Amount 19% 192,05
Total € incl. VAT 1.202,85

Payment Terms 1 Monat/2% Rabatt innerh. 8 Tagen
Payment Method Banktransit

3

Free text

Signature Customer

BEYONDIT GmbH Schauenburgerstraße 116, 24118 Kiel **Email:** invoice@beyond365.de **Phone:** +49 431 3630 3700
Website: www.beyond365.de **Tax No.:** [illegible] **VAT No.:** [illegible] **Managing Directors:** Daniel Gorski, Marc Schnoor
County Court: Kiel (Germany) **Commercial Register:** [illegible] **Bank:** [illegible] **Account Holder:** BEYONDIT GmbH
BIC: [illegible] **IBAN:** [illegible]

8. Under the **Field** column, add the **Free Text** field to the selected display area.

You have placed the free text in the report template. This free text is used for all documents for which the corresponding report template is also applied.

Next Chapter

Use HTML Elements to Format Texts

This section describes which HTML elements BEYOND Reports supports and which HTML elements you can use to layout texts (e.g. in field captions or in free texts).

NOTE

Combination
You can combine these HTML elements in any order, i.e. you can also format an important passage in your text or the field caption in red, underlined and bold.

The following HTML elements are supported:

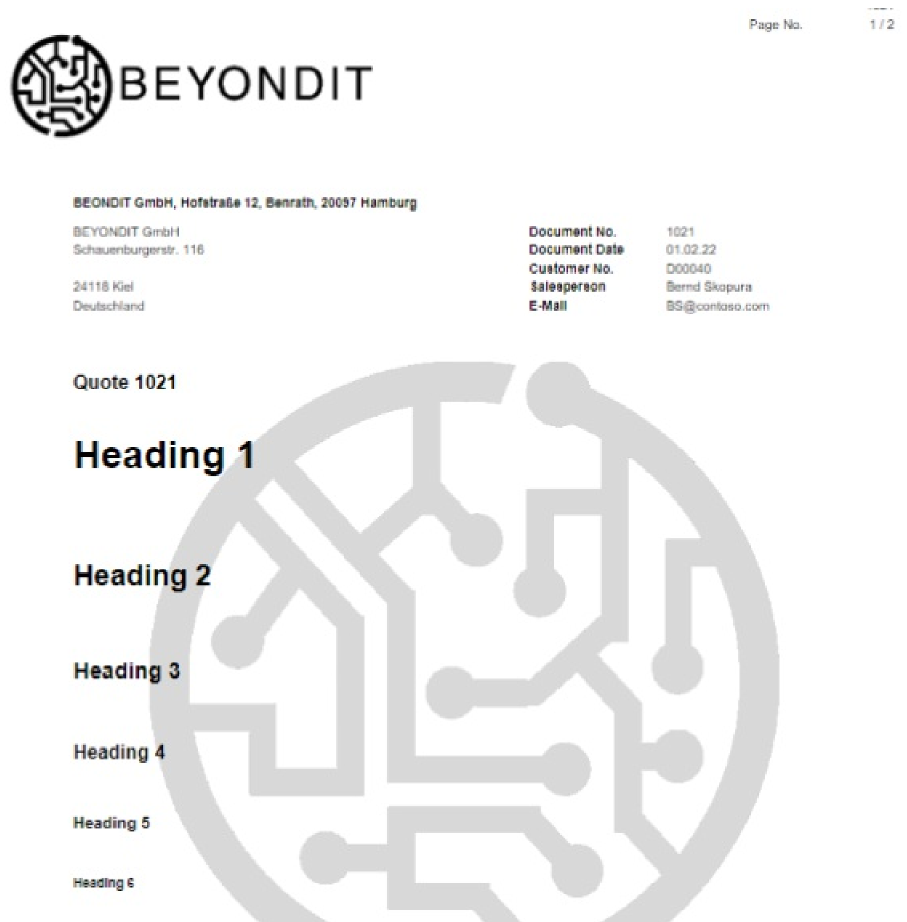
- Heading
- Line Break
- Color
  - Color Formatting with Words
  - Color Formatting with Hex Values
- Bold
- Italic
- Underlined

Heading

You can format texts or words in free texts or field captions as headings. BEYOND Reports supports up to 6 heading levels. To format a text or word as a heading, you must use so-called "tags". The tags declare the beginning of the formatting and the end of the formatting, i.e. from where in the text the formatting starts and where it ends. Below you will find an overview of the HTML heading elements:

Element	HTML Tags	Description
Heading 1		Enter the text which you want to format as **Heading 1** enclosed in the tags. Example: ** Heading 1 **
Heading 2		Enter the text which you want to format as **Heading 2** enclosed in the tags. Example: ** Heading 2 **
Heading 3		Enter the text which you want to format as **Heading 3** enclosed in the tags. Example: ** Heading 3 **
Heading 4		Enter the text which you want to format as **Heading 4** enclosed in the tags. Example: ** Heading 4 **
Heading 5		Enter the text which you want to format as **Heading 5** enclosed in the tags. Example: ** Heading 5 **
Heading 6		Enter the text which you want to format as **Heading 6** enclosed in the tags. Example: ** Heading 6 **

The following figure shows a comparison of headings to each other and to the body text in a report.



Page No. 1 / 2

BEONDIT GmbH, Hofstraße 12, Benrath, 20097 Hamburg

BEYONDIT GmbH
Schauenburgerstr. 116

24118 Kiel
Deutschland

Document No.	1021
Document Date	01.02.22
Customer No.	D00040
Salesperson	Bernd Skopura
E-Mail	BS@contoso.com

Quote 1021

Heading 1

Heading 2

Heading 3

Heading 4

Heading 5

Heading 6

Line Break

If you want to add a line break to a text, you can insert it using the HTML tag <br>.

> **NOTE**
>
> **Use of Line Breaks**
> For a line break, it is not necessary to define a start and end point for the formatting because they did not differ. Therefore, you do not need to add a “closing” tag.

Element	HTML Tags	Description
Line Break	 	Enter the line break at the desired location in your text. A new text line is used behind the line break tag. The new line would start right after the tag.

Color

You can format texts or words in free texts or field labels with color. To color a text or word, you must use so-called “tags”. The tags declare the beginning of the formatting and the end of the formatting, i.e. from where in the text the formatting starts and where it ends. You can specify color words or hex values for the formatting.

Below is an overview of common colors and the corresponding tags for formatting:

Color Formatting with Words Color Formatting with Hex Values

Color Formatting with Words

Black color is used by default, if you want to format a word or text in a different color, you can do it using color formatting with color words or hexadecimal color formatting.

Color	HTML Tags	Description
Red	</color>	Example: **Red**
Blue	</color>	Example: **Blue**
Green	</color>	Example: **Green**
Yellow	</color>	Example: **Yellow**
Orange	</color>	Example: **Orange**

The color words listed here are just a few examples that allow you to do basic formatting of the text/field captions. There are many more color words that you can use. See the website w3schools for a more detailed overview of available color words.

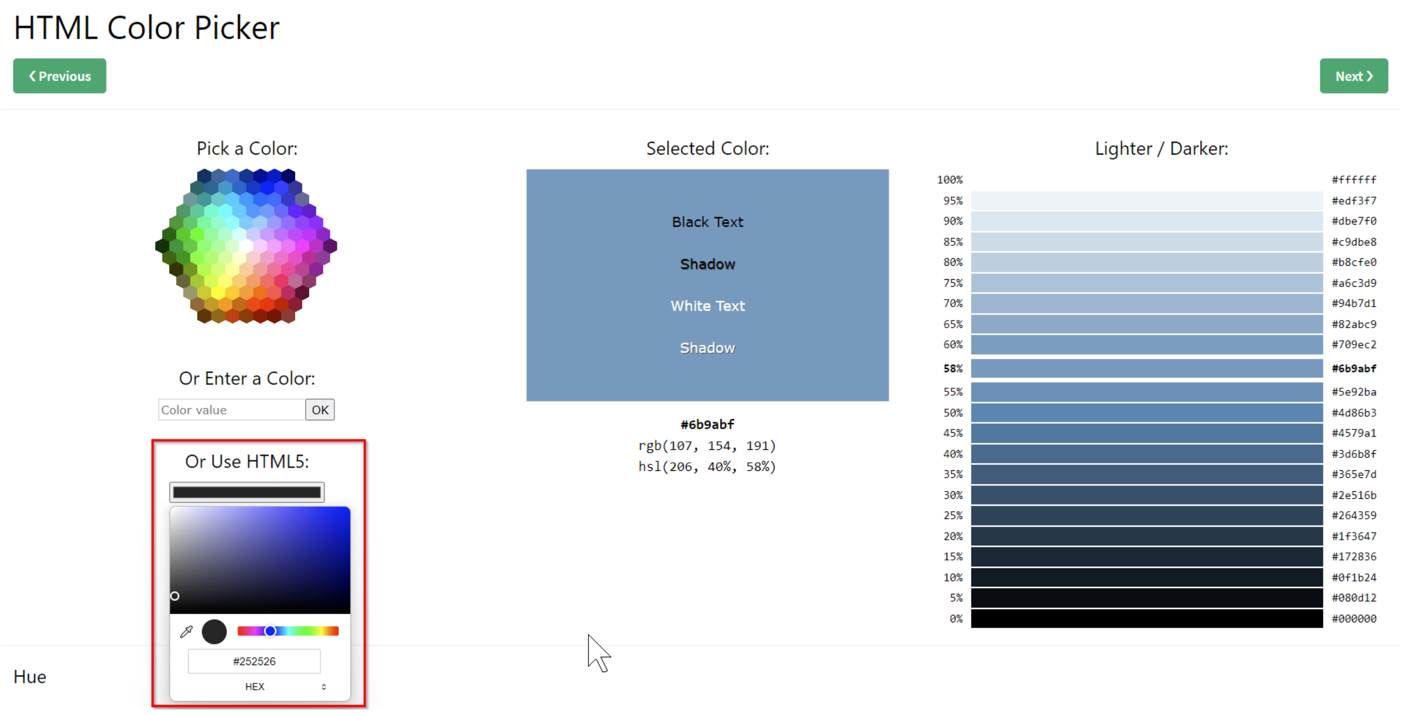
If you want to write a text in your corporate colors, it is possible that no color word corresponds to your exact corporate color. In this case, you should resort to color formatting using hexadecimal values so that the color formatting matches your color exactly.

Color Formatting with Hex Values

Hexadecimal color formatting offers you a wide color palette for color formatting your texts or field captions. With hexadecimal colors you can select countless color gradations (for example all red levels between white/light red and dark red/black) for formatting. Below you will find an example of how to specify a corresponding color.

Color	HTML Tags	Description
Red	</color>	Example: **Red**
Blue	</color>	Example: **Blue**
Green	</color>	Example: **Green**
Yellow	</color>	Example: **Yellow**
Orange	</color>	Example: **Orange**

The website w3schools offers a hexadecimal color picker/generator. You can determine the exact color there via the tool .



Bold

You can format text or words in free text or field captions in bold. To format a text or word in bold, you must use so-called “tags”. The tags declare the beginning of the formatting and the end of the formatting, i.e. from where in the text the formatting starts and where it ends.

Element	HTML Tags	Description
Bold		Enter the text that you want to format enclosed in the bold tags in the input field. Example: The word **bold** will be formatted bold.

Italic

You can italicize text or words in free text or field captions. To format a text or word in italics, you must use so-called “tags”. The tags declare the beginning of the formatting and the end of the formatting, i.e. from where in the text the formatting starts and where it ends.

Element	HTML Tags	Description
Italic	<i></i>	Enter the text that you want to format enclosed in the italic tags in the input field. Example: The word *<i>italic</i>* will be formatted italic.

Underlined

You can underline text or words in free text or field captions. To underline a text or a word you have to use so-called “tags”. The tags declare the beginning of the formatting and the end of the formatting, i.e. from where in the text the formatting starts and where it ends.

Element	HTML Tags	Description
Underlined	<u></u>	Enter the text that you want to format enclosed in the underlined tags in the input field. Example: The word <u>underlined</u> will be underlined.