



# BEYOND REPORTS

# User Guide



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# Table of Contents

About BEYOND Reports

Setup

- Assign User Permissions

- Setup Wizard

- Copy Report Settings to another Template

License Management

- License Management

Features

- Use BEYOND Reports

- Use Placeholders

  - Create Placeholder

  - Use Placeholders in Field Captions

- Display Header Fields in Reports

  - Display and Position Fields in Reports

  - Edit Field Captions

- Add Text to Document

  - Create Document-Level Pre-Text

  - Create Document-Level Post-Text

  - Create Line-Level Pre-Text

  - Create Line-Level Post-Text

  - Create HTML Text Template

  - Use Text Designer

- Add Free Text to Report Template

  - Create Free Text

  - Place Free Text in Report

  - Use HTML Elements to Format Texts

# 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 default 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
<b>BYD REPORTS ADMIN</b>	<ul style="list-style-type: none"><li>• Activate BEYOND Reports License</li><li>• Setup BEYOND Reports</li><li>• Define custom field captions</li><li>• Define custom report names</li><li>• Create and edit placeholders for reports</li><li>• Create and edit HTML texts</li><li>• Create and edit HTML text templates</li><li>• Add and move fields in reports</li><li>• Create reports with BEYOND Reports</li></ul>
<b>BYD REPORTS USER</b>	<ul style="list-style-type: none"><li>• Create and edit HTML texts</li><li>• Create and edit HTML text templates</li><li>• Create reports with BEYOND Reports</li></ul>
<b>BYD REPORTS READER</b>	<ul style="list-style-type: none"><li>• Create reports with BEYOND Reports (no permissions for the above mentioned features and options)</li></ul>

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.

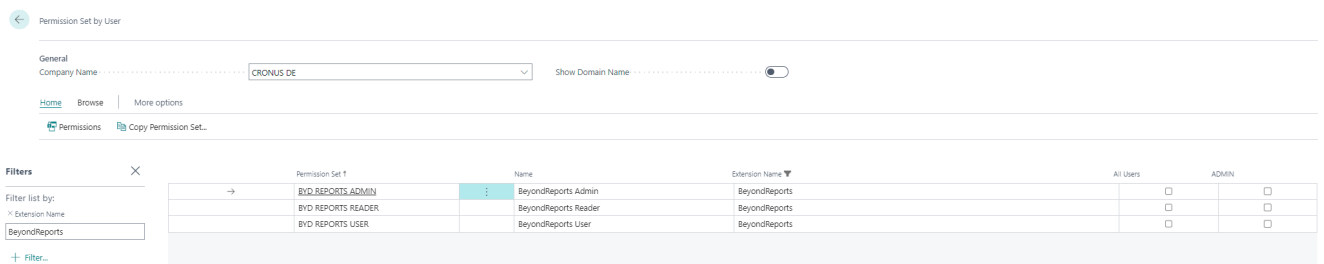


Figure: Permission Sets for BEYOND Reports

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.

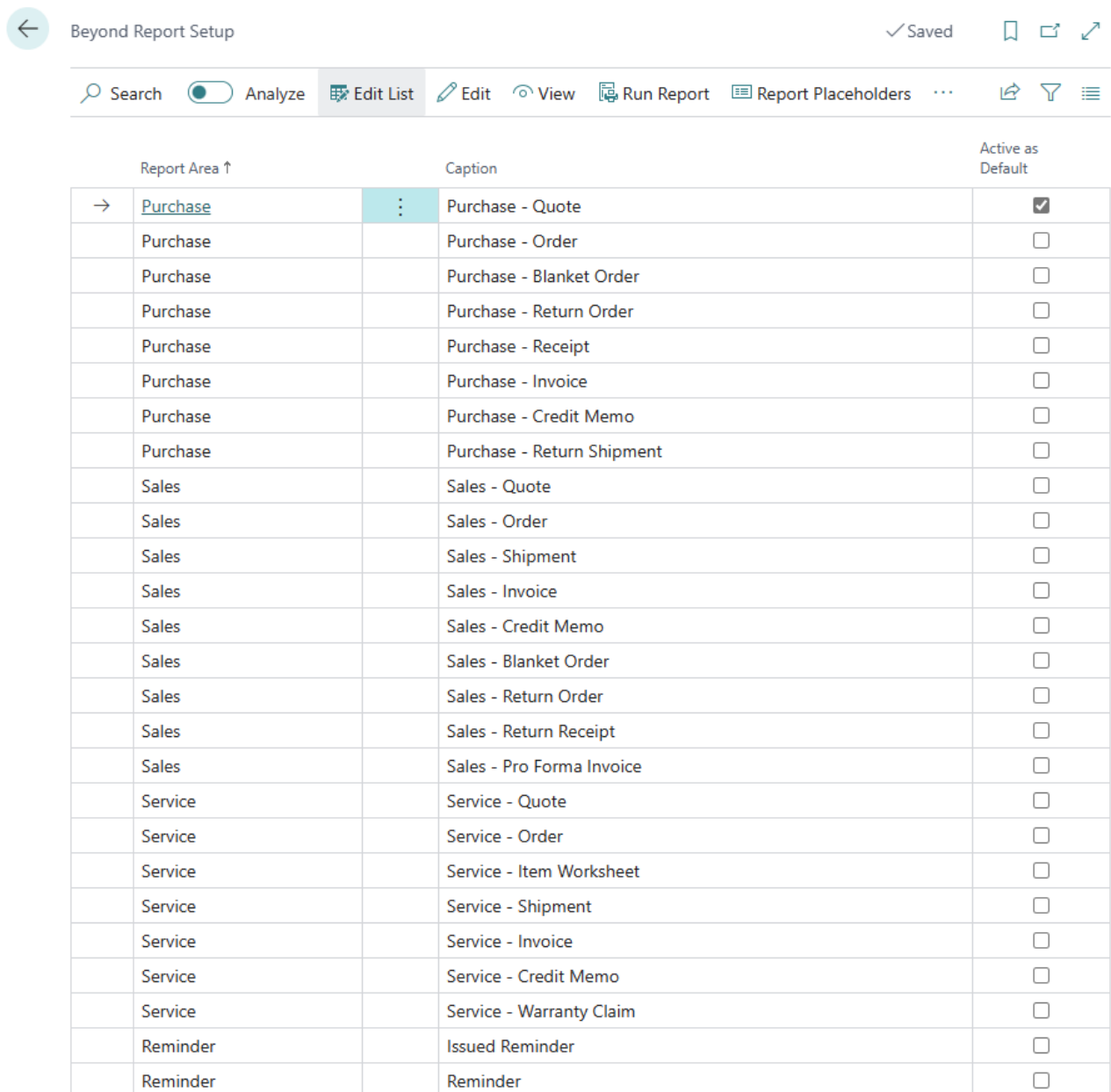
## NOTE

### 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.



Report Area ↑	Caption	Active as Default
→ <a href="#">Purchase</a>	⋮ Purchase - Quote	<input checked="" type="checkbox"/>
Purchase	Purchase - Order	<input type="checkbox"/>
Purchase	Purchase - Blanket Order	<input type="checkbox"/>
Purchase	Purchase - Return Order	<input type="checkbox"/>
Purchase	Purchase - Receipt	<input type="checkbox"/>
Purchase	Purchase - Invoice	<input type="checkbox"/>
Purchase	Purchase - Credit Memo	<input type="checkbox"/>
Purchase	Purchase - Return Shipment	<input type="checkbox"/>
Sales	Sales - Quote	<input type="checkbox"/>
Sales	Sales - Order	<input type="checkbox"/>
Sales	Sales - Shipment	<input type="checkbox"/>
Sales	Sales - Invoice	<input type="checkbox"/>
Sales	Sales - Credit Memo	<input type="checkbox"/>
Sales	Sales - Blanket Order	<input type="checkbox"/>
Sales	Sales - Return Order	<input type="checkbox"/>
Sales	Sales - Return Receipt	<input type="checkbox"/>
Sales	Sales - Pro Forma Invoice	<input type="checkbox"/>
Service	Service - Quote	<input type="checkbox"/>
Service	Service - Order	<input type="checkbox"/>
Service	Service - Item Worksheet	<input type="checkbox"/>
Service	Service - Shipment	<input type="checkbox"/>
Service	Service - Invoice	<input type="checkbox"/>
Service	Service - Credit Memo	<input type="checkbox"/>
Service	Service - Warranty Claim	<input type="checkbox"/>
Reminder	Issued Reminder	<input type="checkbox"/>
Reminder	Reminder	<input type="checkbox"/>

BEYOND Reports Setup

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



### Welcome to the Beyond Reports Setup

This wizard will allow you to setup all reports at once.

### Warning

Please be aware that all settings for all reports will be overwritten by this process!

### Let's go!

Click next to continue.

---

[Suggest Values](#)

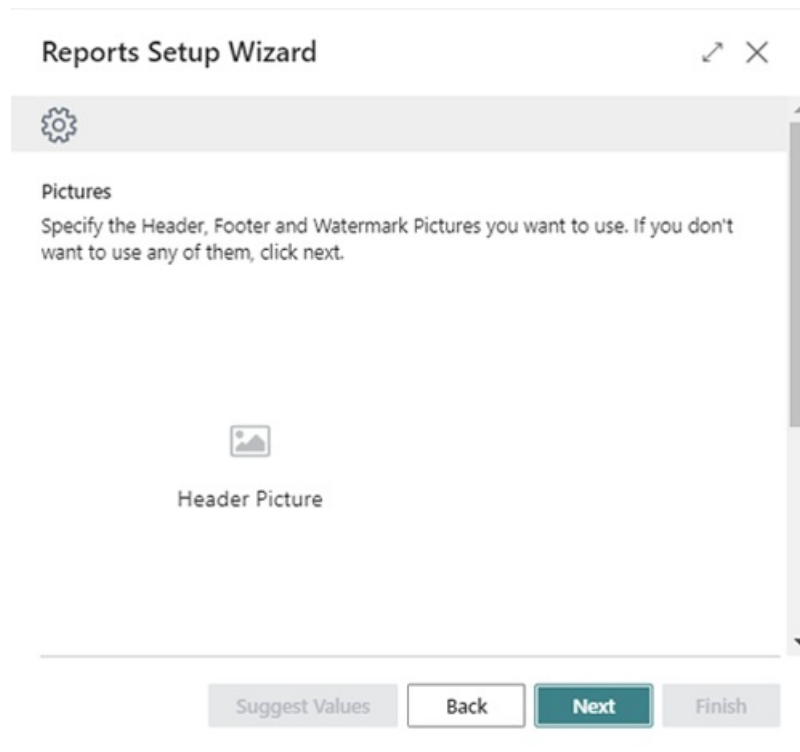
[Back](#)

[Next](#)

[Finish](#)

---

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



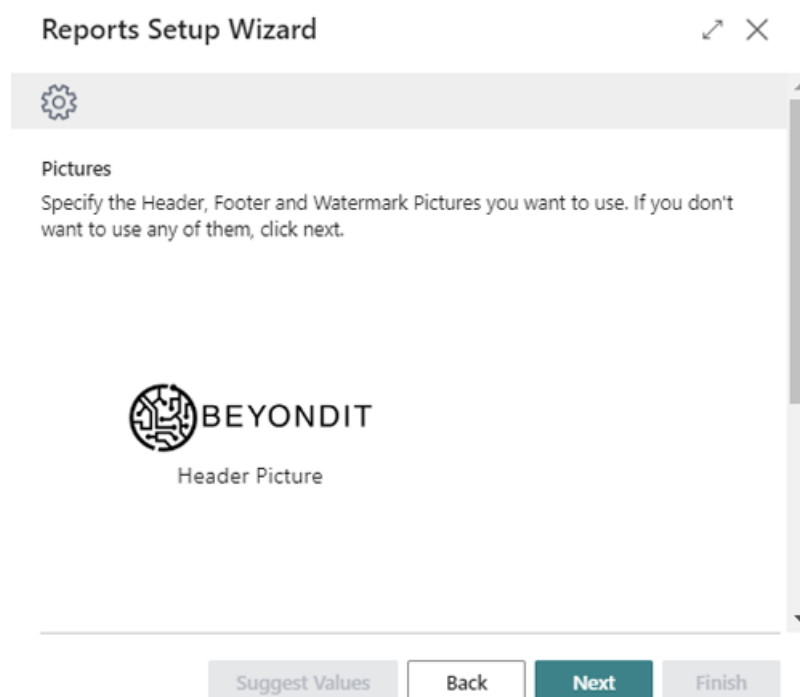
Upload Pictures for Reports

- 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)



Uploaded Report Pictures



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.

**Reports Setup Wizard**

**Print Settings**  
Select how you want the reports to be printed.

Document Header HTML Text	Don't Print
Document Line HTML Text	Don't Print
Description 2	Don't Print
Lines without Quantity	Don't Print
Page Number	Don't Print
Item No.	Print
Signature Area	Don't Print
Barcode	Don't Print

Buttons: Suggest Values, Back, **Next**, Finish

Define Print Settings

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

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

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

## Reports Setup Wizard



### Custom Captions

Setup custom captions for the report fields, if needed.

Custom Captions ▾

Field ↑	New Language Code ↑	New Caption
→		

Suggest Values

Back

Next

Finish

Setup Customized Captions in 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.

## Reports Setup Wizard



### Custom Captions

Setup custom captions for the report fields, if needed.

Custom Captions ▾

Field ↑	New Language Code ↑	New Caption
Verkäufer / E...	DEU	Mitarbeiter
→ Verkäufer / E...	ENU	Employee

Suggest Values

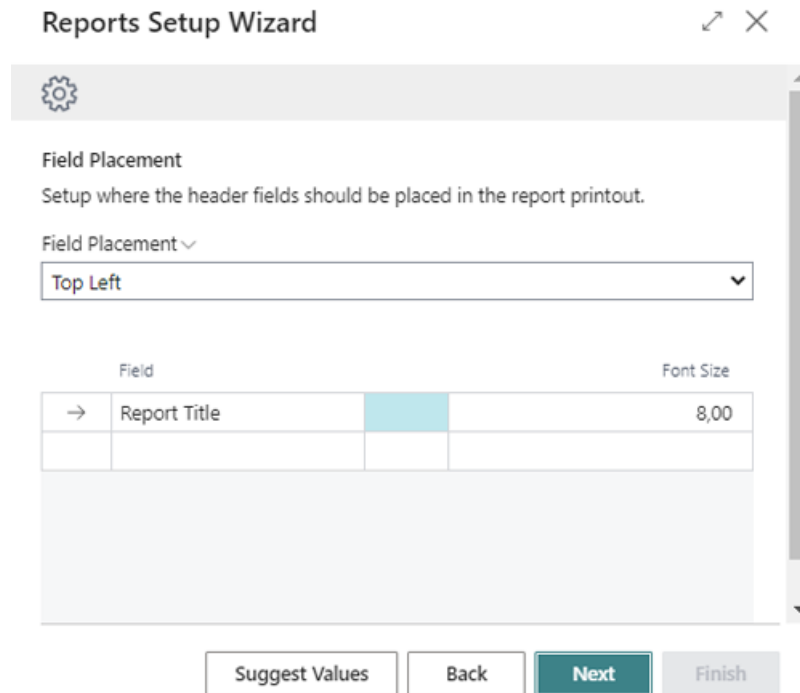
Back

Next

Finish

Customized Captions

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.

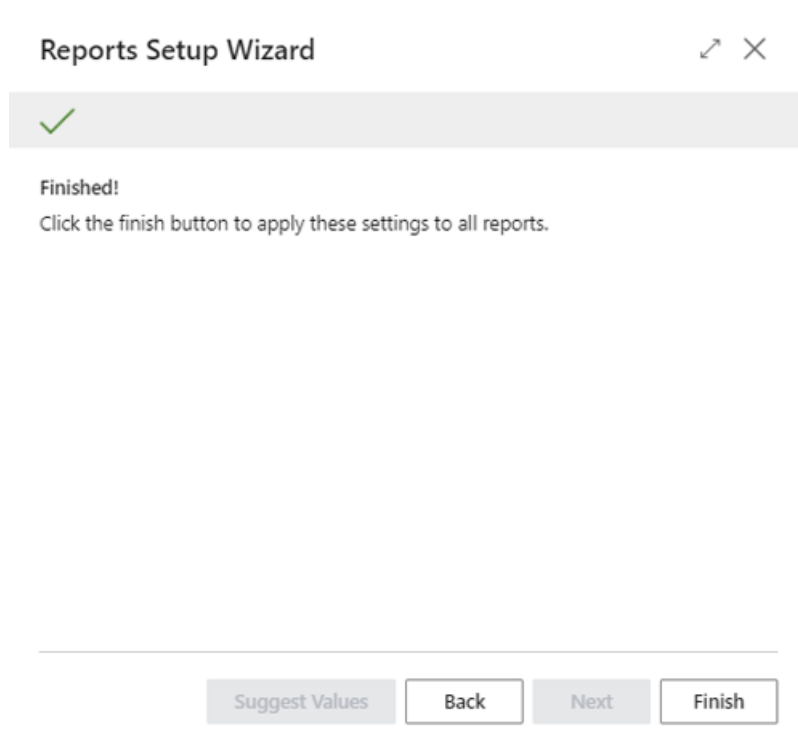


The screenshot shows the 'Reports Setup Wizard' window. At the top, there is a title bar with 'Reports Setup Wizard' and a close button. Below the title bar is a gear icon and the text 'Field Placement' followed by the instruction 'Setup where the header fields should be placed in the report printout.' A dropdown menu labeled 'Field Placement' is set to 'Top Left'. Below this is a table with two columns: 'Field' and 'Font Size'. The first row has a right-pointing arrow in the 'Field' column, 'Report Title' in the next column, a light blue selection box in the third column, and '8,00' in the 'Font Size' column. Below the table are four buttons: 'Suggest Values', 'Back', 'Next' (highlighted in green), and 'Finish'.

Field	Font Size
→ Report Title	8,00

Display and Place Additional Report Header Fields

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**.



Completion of the Setup Wizard

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.

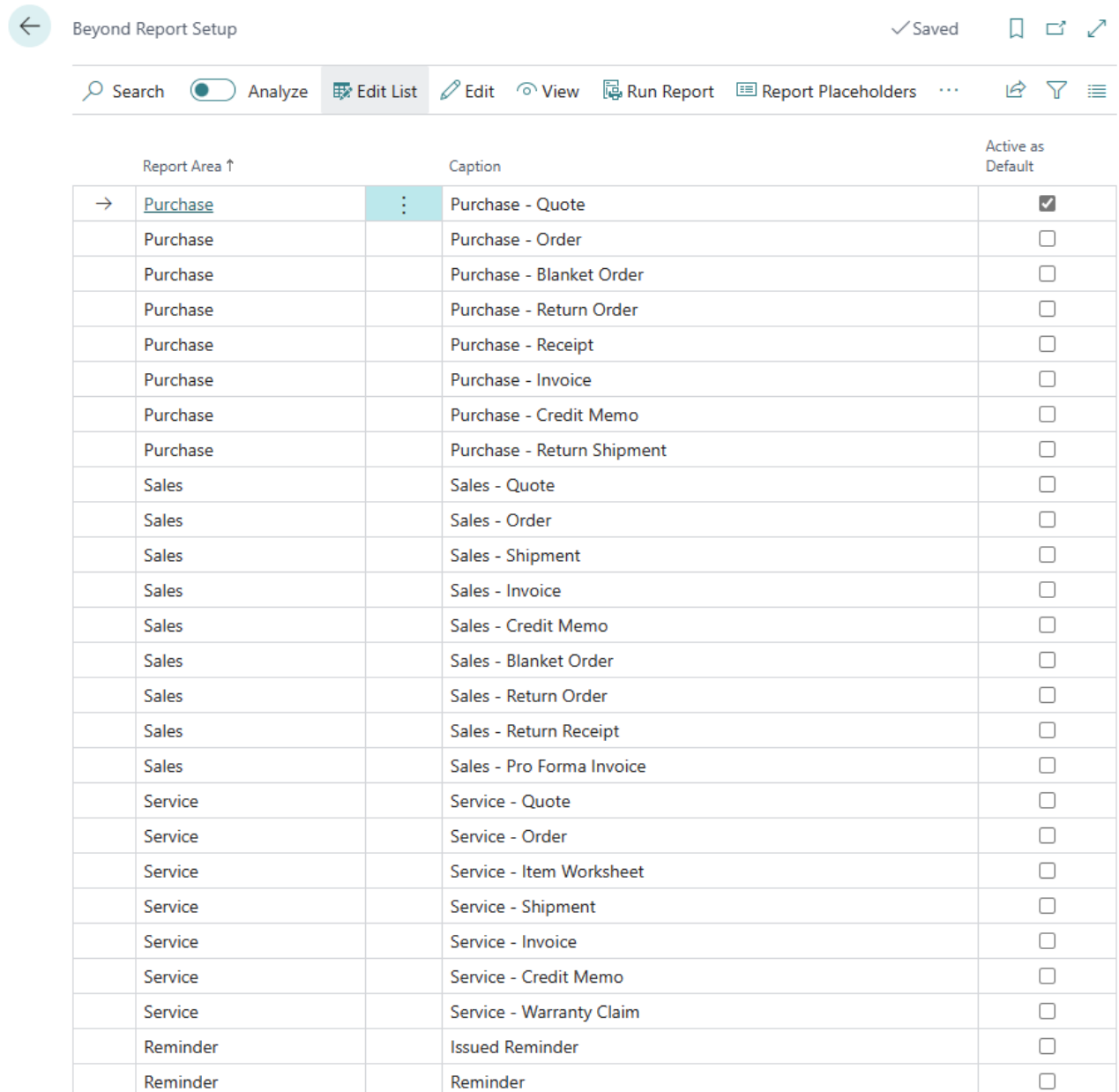
[Next Chapter](#)

# 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.



The screenshot shows the 'Beyond Report Setup' page. At the top, there is a navigation bar with a back arrow, the title 'Beyond Report Setup', a 'Saved' status, and icons for bookmark, share, and refresh. Below this is a toolbar with icons for Search, Analyze, Edit List (highlighted), Edit, View, Run Report, and Report Placeholders. The main content is a table with three columns: 'Report Area ↑', 'Caption', and 'Active as Default'. The first row is selected, showing 'Purchase' as the Report Area and 'Purchase - Quote' as the Caption, with the 'Active as Default' checkbox checked. The table lists various report templates for Purchase, Sales, Service, and Reminder categories.

Report Area ↑	Caption	Active as Default
→ Purchase	Purchase - Quote	<input checked="" type="checkbox"/>
Purchase	Purchase - Order	<input type="checkbox"/>
Purchase	Purchase - Blanket Order	<input type="checkbox"/>
Purchase	Purchase - Return Order	<input type="checkbox"/>
Purchase	Purchase - Receipt	<input type="checkbox"/>
Purchase	Purchase - Invoice	<input type="checkbox"/>
Purchase	Purchase - Credit Memo	<input type="checkbox"/>
Purchase	Purchase - Return Shipment	<input type="checkbox"/>
Sales	Sales - Quote	<input type="checkbox"/>
Sales	Sales - Order	<input type="checkbox"/>
Sales	Sales - Shipment	<input type="checkbox"/>
Sales	Sales - Invoice	<input type="checkbox"/>
Sales	Sales - Credit Memo	<input type="checkbox"/>
Sales	Sales - Blanket Order	<input type="checkbox"/>
Sales	Sales - Return Order	<input type="checkbox"/>
Sales	Sales - Return Receipt	<input type="checkbox"/>
Sales	Sales - Pro Forma Invoice	<input type="checkbox"/>
Service	Service - Quote	<input type="checkbox"/>
Service	Service - Order	<input type="checkbox"/>
Service	Service - Item Worksheet	<input type="checkbox"/>
Service	Service - Shipment	<input type="checkbox"/>
Service	Service - Invoice	<input type="checkbox"/>
Service	Service - Credit Memo	<input type="checkbox"/>
Service	Service - Warranty Claim	<input type="checkbox"/>
Reminder	Issued Reminder	<input type="checkbox"/>
Reminder	Reminder	<input type="checkbox"/>

Figure: Beyond Reports Setup

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.

Report Area ↑	Caption	Active as Default
→ Purchase	Purchase - Order	<input type="checkbox"/>
Purchase	Purchase - Blanket Order	<input type="checkbox"/>
Purchase	Purchase - Return Order	<input type="checkbox"/>
Purchase	Purchase - Receipt	<input type="checkbox"/>
Purchase	Purchase - Invoice	<input type="checkbox"/>
Purchase	Purchase - Credit Memo	<input type="checkbox"/>
Purchase	Purchase - Return Shipment	<input type="checkbox"/>
Sales	Sales - Quote	<input type="checkbox"/>
Sales	Sales - Order	<input type="checkbox"/>
Sales	Sales - Shipment	<input type="checkbox"/>
Sales	Sales - Invoice	<input type="checkbox"/>
Sales	Sales - Credit Memo	<input type="checkbox"/>
Sales	Sales - Blanket Order	<input type="checkbox"/>
Sales	Sales - Return Order	<input type="checkbox"/>
Sales	Sales - Return Receipt	<input type="checkbox"/>
Sales	Sales - Pro Forma Invoice	<input type="checkbox"/>
Service	Service - Quote	<input type="checkbox"/>
Service	Service - Order	<input type="checkbox"/>
Service	Service - Item Worksheet	<input type="checkbox"/>
Service	Service - Shipment	<input type="checkbox"/>
Service	Service - Invoice	<input type="checkbox"/>
Service	Service - Credit Memo	<input type="checkbox"/>
Service	Service - Warranty Claim	<input type="checkbox"/>
Reminder	Issued Reminder	<input type="checkbox"/>
Reminder	Reminder	<input type="checkbox"/>

OK Cancel

Figure: Copy report configuration to another report template

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

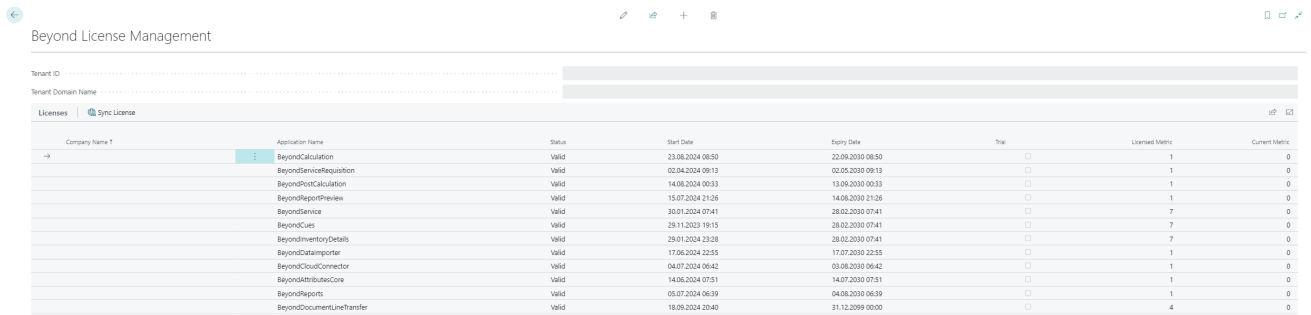
You have transferred the configuration of a report template to other report templates.

# 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.



Company Name 1	Application Name	Status	Start Date	Expiry Date	Trial	Licensed Metric	Current Metric
	BeyondCalculation	Valid	23.08.2024 08:50	22.09.2030 08:50	<input type="checkbox"/>	1	0
	BeyondServiceRequester	Valid	02.04.2024 09:13	02.05.2030 09:13	<input type="checkbox"/>	1	0
	BeyondProtCalculation	Valid	14.08.2024 09:33	13.09.2030 09:33	<input type="checkbox"/>	1	0
	BeyondReportReview	Valid	15.07.2024 21:26	14.08.2030 21:26	<input type="checkbox"/>	1	0
	BeyondService	Valid	30.01.2024 07:41	28.02.2030 07:41	<input type="checkbox"/>	7	0
	BeyondCuts	Valid	29.11.2023 19:15	28.02.2030 07:41	<input type="checkbox"/>	7	0
	BeyondInventoryDetails	Valid	29.01.2024 23:28	28.02.2030 07:41	<input type="checkbox"/>	7	0
	BeyondDataImporter	Valid	17.08.2024 22:55	17.07.2030 22:55	<input type="checkbox"/>	1	0
	BeyondCloudConnector	Valid	04.07.2024 09:42	03.08.2030 09:42	<input type="checkbox"/>	1	0
	BeyondAttributionCore	Valid	14.06.2024 07:51	14.07.2030 07:51	<input type="checkbox"/>	1	0
	BeyondReports	Valid	05.07.2024 06:39	04.08.2030 06:39	<input type="checkbox"/>	1	0
	BeyondDocumentLineTransfer	Valid	18.09.2024 20:40	31.12.2099 00:00	<input type="checkbox"/>	4	0

Figure: License Management

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
<b>Company Name</b>	This column indicates the name of the company.
<b>Application Name</b>	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,
<b>Status</b>	This is the status of the product license. Several values are possible: <b>Valid:</b> The product license is valid and the application can be used without restrictions. <b>Expired:</b> The product license has expired. The application can no longer be used. <b>Trial:</b> 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 <b>expiry date</b> column) with restrictions or without restrictions. <b>Exceeded:</b> The product license has expired. The application can no longer be used.
<b>Start Date</b>	This is the date on which the product license was registered.
<b>Expiry Date</b>	This is the date on which the product license becomes or became invalid. The application can no longer be used.
<b>Trial</b>	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 <b>Expiry date</b> column).
<b>Licensed Metric</b>	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.
<b>Current Metric</b>	This column shows how many licenses are used in the environment. The difference between the values in the <b>Licensed metric</b> and <b>Current metric</b> 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](#)
- [Setup Footer Picture](#)
- [Setup Watermark](#)
- [Available Print Settings](#)
  - [Document Header HTML Text](#)
  - [Document Line HTML Text](#)
  - [Description 2](#)
  - [Lines without Quantity](#)
  - [Page Number](#)
  - [Item Number](#)
  - [Signature Area](#)
  - [Barcode](#)
  - [Position No.](#)
  - [Increase Position No.](#)
  - [Font Type](#)
  - [Font Size](#)
- [Use BEYOND Reports](#)

## 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
→ <a href="#">Purchase</a>	Purchase - Quote	<input checked="" type="checkbox"/>
Purchase	Purchase - Order	<input type="checkbox"/>
Purchase	Purchase - Blanket Order	<input type="checkbox"/>
Purchase	Purchase - Return Order	<input type="checkbox"/>
Purchase	Purchase - Receipt	<input type="checkbox"/>
Purchase	Purchase - Invoice	<input type="checkbox"/>
Purchase	Purchase - Credit Memo	<input type="checkbox"/>
Purchase	Purchase - Return Shipment	<input type="checkbox"/>
Sales	Sales - Quote	<input type="checkbox"/>
Sales	Sales - Order	<input type="checkbox"/>
Sales	Sales - Shipment	<input type="checkbox"/>
Sales	Sales - Invoice	<input type="checkbox"/>
Sales	Sales - Credit Memo	<input type="checkbox"/>
Sales	Sales - Blanket Order	<input type="checkbox"/>
Sales	Sales - Return Order	<input type="checkbox"/>
Sales	Sales - Return Receipt	<input type="checkbox"/>
Sales	Sales - Pro Forma Invoice	<input type="checkbox"/>
Service	Service - Quote	<input type="checkbox"/>
Service	Service - Order	<input type="checkbox"/>
Service	Service - Item Worksheet	<input type="checkbox"/>
Service	Service - Shipment	<input type="checkbox"/>
Service	Service - Invoice	<input type="checkbox"/>
Service	Service - Credit Memo	<input type="checkbox"/>
Service	Service - Warranty Claim	<input type="checkbox"/>
Reminder	Issued Reminder	<input type="checkbox"/>
Reminder	Reminder	<input type="checkbox"/>

BEYOND Reports Setup

- 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.
- 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.

**General**

ID: 70839255

Name: BYD Sales - Quote

Caption: Sales - Quote

Active as Default:

**Pictures**

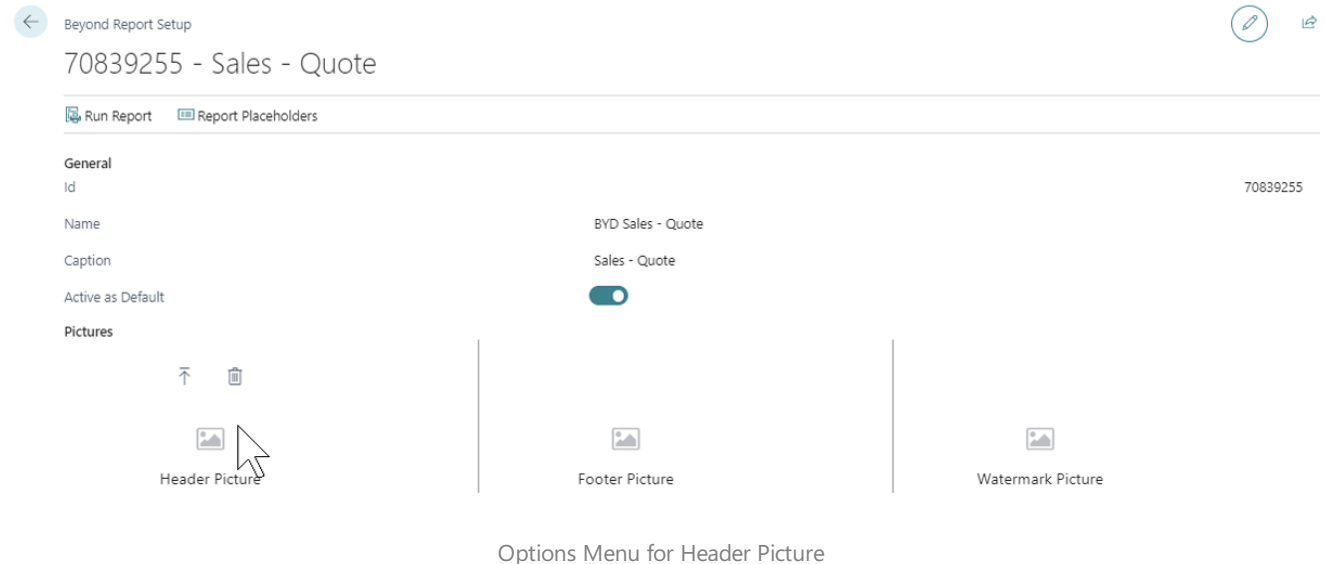
Header Picture  Footer Picture  Watermark Picture

**BEYOND Quake, Helsinki 12, Kavatt, 20097 Helsingborg**


Pos. No.	Description	Quantity	Unit Price	Line Amount
1	BEYOND Quake	1	1,000.00	1,000.00
2	BEYOND Quake	1	1,000.00	1,000.00
Total		2		2,000.00

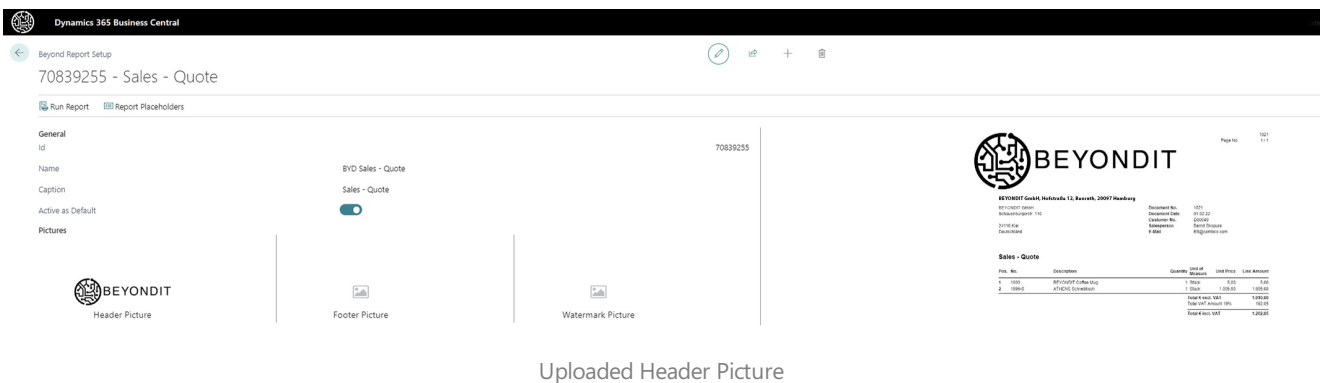
Set Header Picture

- 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.



Options Menu for Header Picture

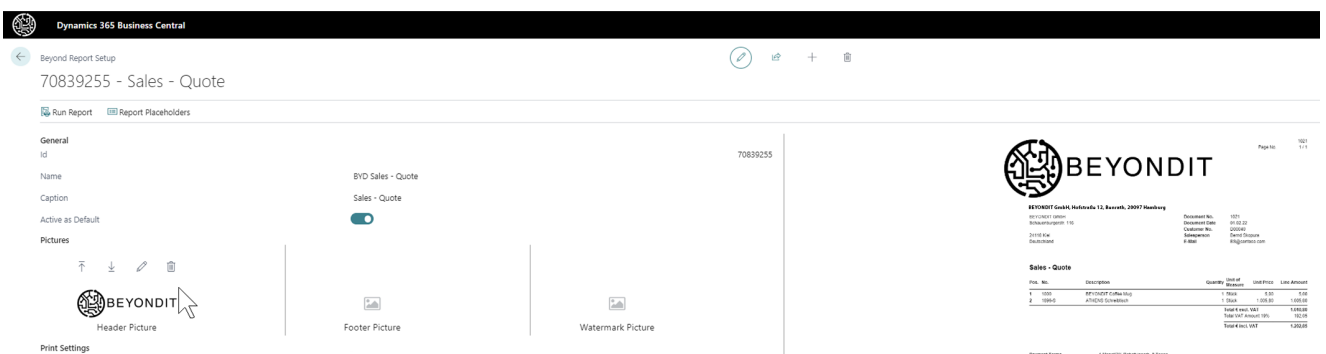
7. In the options menu for the header picture, click the **Upload** icon .
8. The file explorer is displayed. Specify the path to the header picture and select the appropriate picture. Observe the following given specifications:
  - Size:** 2480×531 px
  - File Type:** PNG file
  - Features:** transparent 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.



Uploaded Header Picture

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.

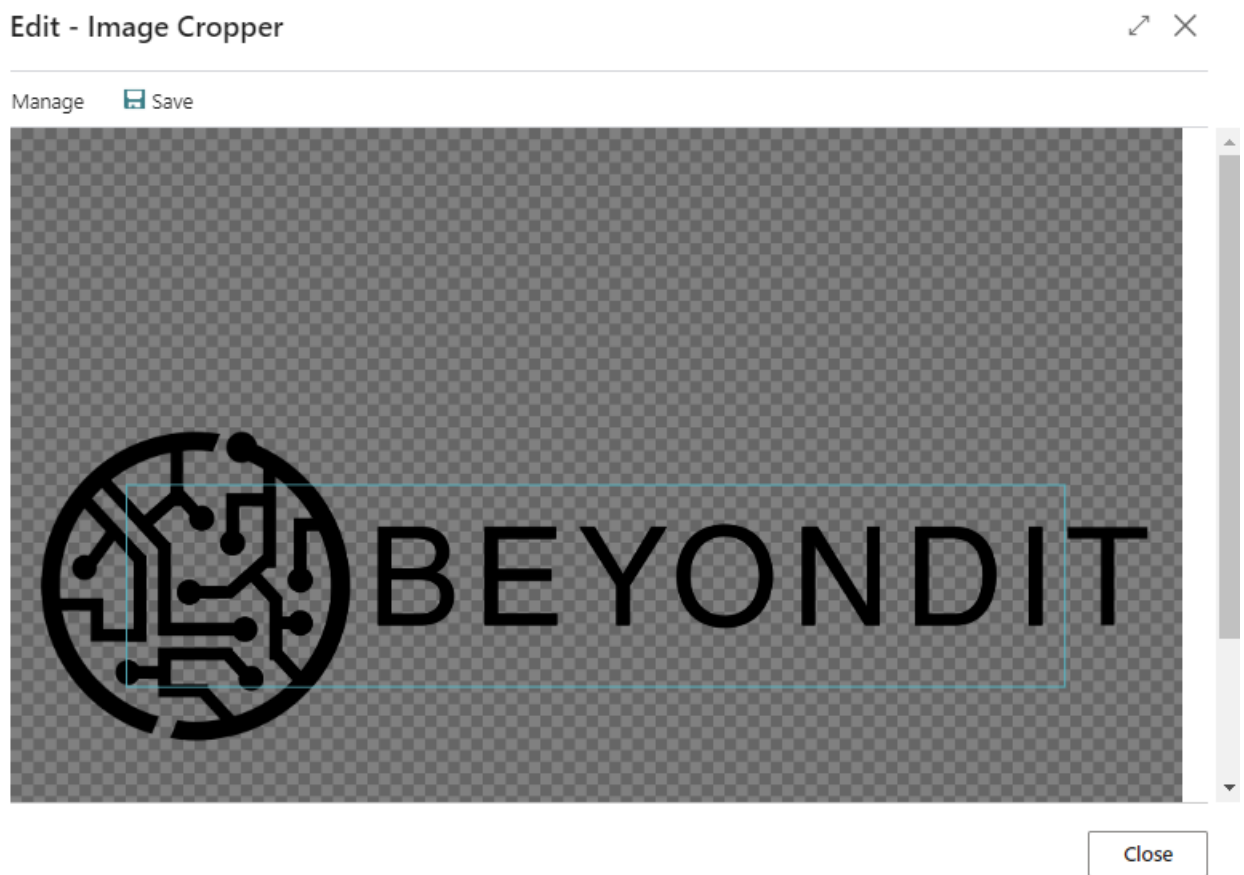
10. Move the mouse cursor to the header picture you have set up in the **Pictures > Header Picture** area.



Additional Options for Header Picture

11. Click the **pen icon** .

12. The **Edit – Image Cropper** window is displayed.



Edit Header Picture


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).

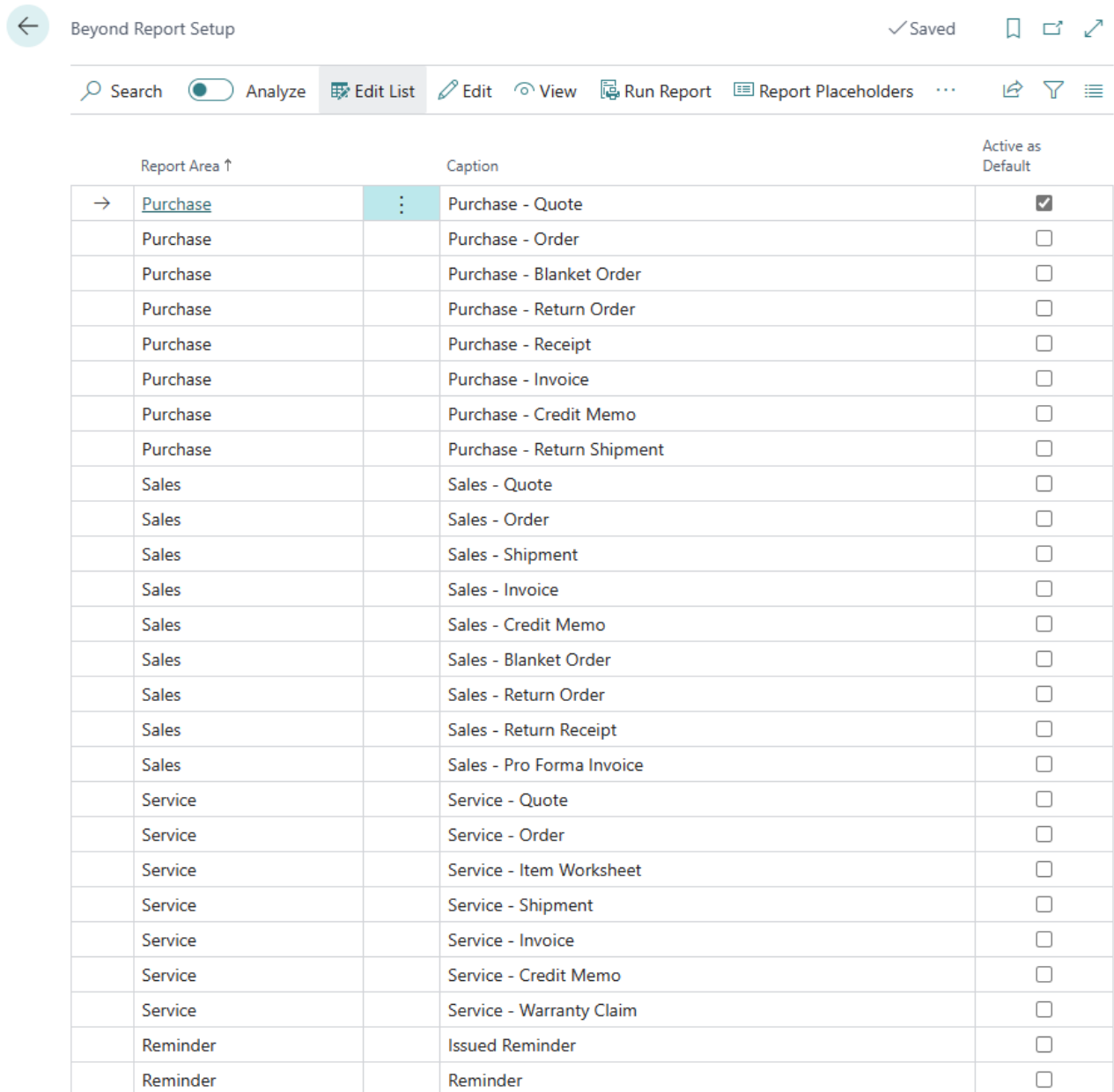
To save the picture and use it in the report, click **Save** in the menu bar. The preview of the report is updated.

# 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.

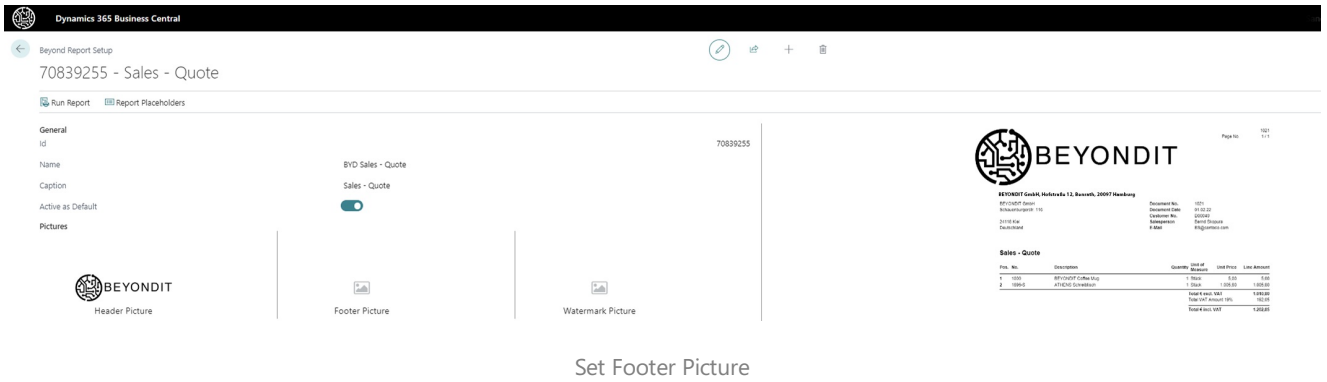


The screenshot shows the 'Beyond Report Setup' page. At the top, there is a navigation bar with a back arrow, the page title 'Beyond Report Setup', and a 'Saved' status. Below the navigation bar is a toolbar with icons for Search, Analyze, Edit List (highlighted), Edit, View, Run Report, Report Placeholders, and a menu icon. The main content is a table with the following columns: Report Area (with an upward arrow), Caption, and Active as Default (with a checkbox). The table lists various report cards across different report areas: Purchase, Sales, Service, and Reminder. The 'Purchase - Quote' report card is selected, indicated by a blue highlight and a checked checkbox in the 'Active as Default' column.

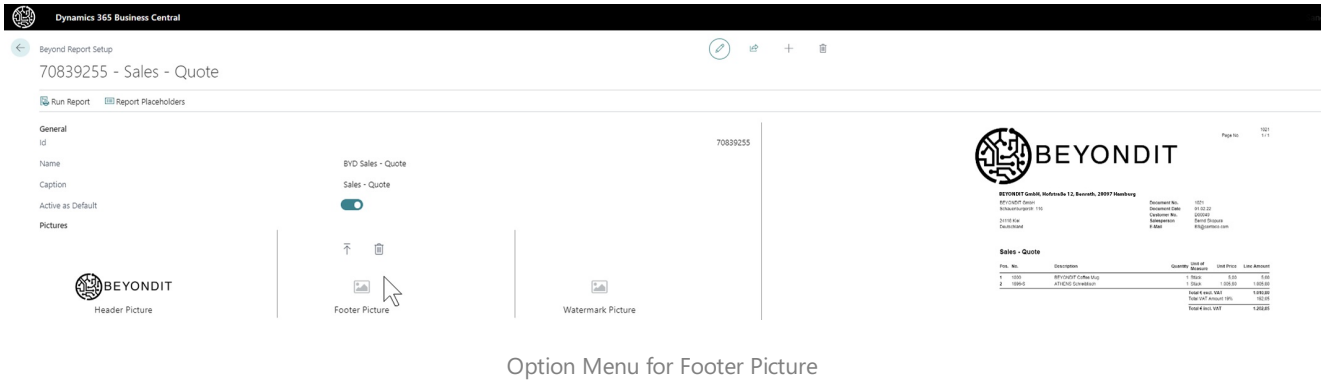
Report Area ↑	Caption	Active as Default
→ Purchase	Purchase - Quote	<input checked="" type="checkbox"/>
Purchase	Purchase - Order	<input type="checkbox"/>
Purchase	Purchase - Blanket Order	<input type="checkbox"/>
Purchase	Purchase - Return Order	<input type="checkbox"/>
Purchase	Purchase - Receipt	<input type="checkbox"/>
Purchase	Purchase - Invoice	<input type="checkbox"/>
Purchase	Purchase - Credit Memo	<input type="checkbox"/>
Purchase	Purchase - Return Shipment	<input type="checkbox"/>
Sales	Sales - Quote	<input type="checkbox"/>
Sales	Sales - Order	<input type="checkbox"/>
Sales	Sales - Shipment	<input type="checkbox"/>
Sales	Sales - Invoice	<input type="checkbox"/>
Sales	Sales - Credit Memo	<input type="checkbox"/>
Sales	Sales - Blanket Order	<input type="checkbox"/>
Sales	Sales - Return Order	<input type="checkbox"/>
Sales	Sales - Return Receipt	<input type="checkbox"/>
Sales	Sales - Pro Forma Invoice	<input type="checkbox"/>
Service	Service - Quote	<input type="checkbox"/>
Service	Service - Order	<input type="checkbox"/>
Service	Service - Item Worksheet	<input type="checkbox"/>
Service	Service - Shipment	<input type="checkbox"/>
Service	Service - Invoice	<input type="checkbox"/>
Service	Service - Credit Memo	<input type="checkbox"/>
Service	Service - Warranty Claim	<input type="checkbox"/>
Reminder	Issued Reminder	<input type="checkbox"/>
Reminder	Reminder	<input type="checkbox"/>


BEYOND Reports Setup

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.

Beyond Report Setup

### 70839255 - Sales - Quote

Run Report Report Placeholders

**General**

Id: 70839255

Name: BYD Sales - Quote

Caption: Sales - Quote

Active as Default:

**Pictures**

Header Picture:

Footer Picture:

Watermark Picture:

Additional Options for Footer Picture

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

### Edit - Image Cropper

Manage Save

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

Page 1 of 1 of Invoice #2022-112

Close

Edit Footer Picture


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).

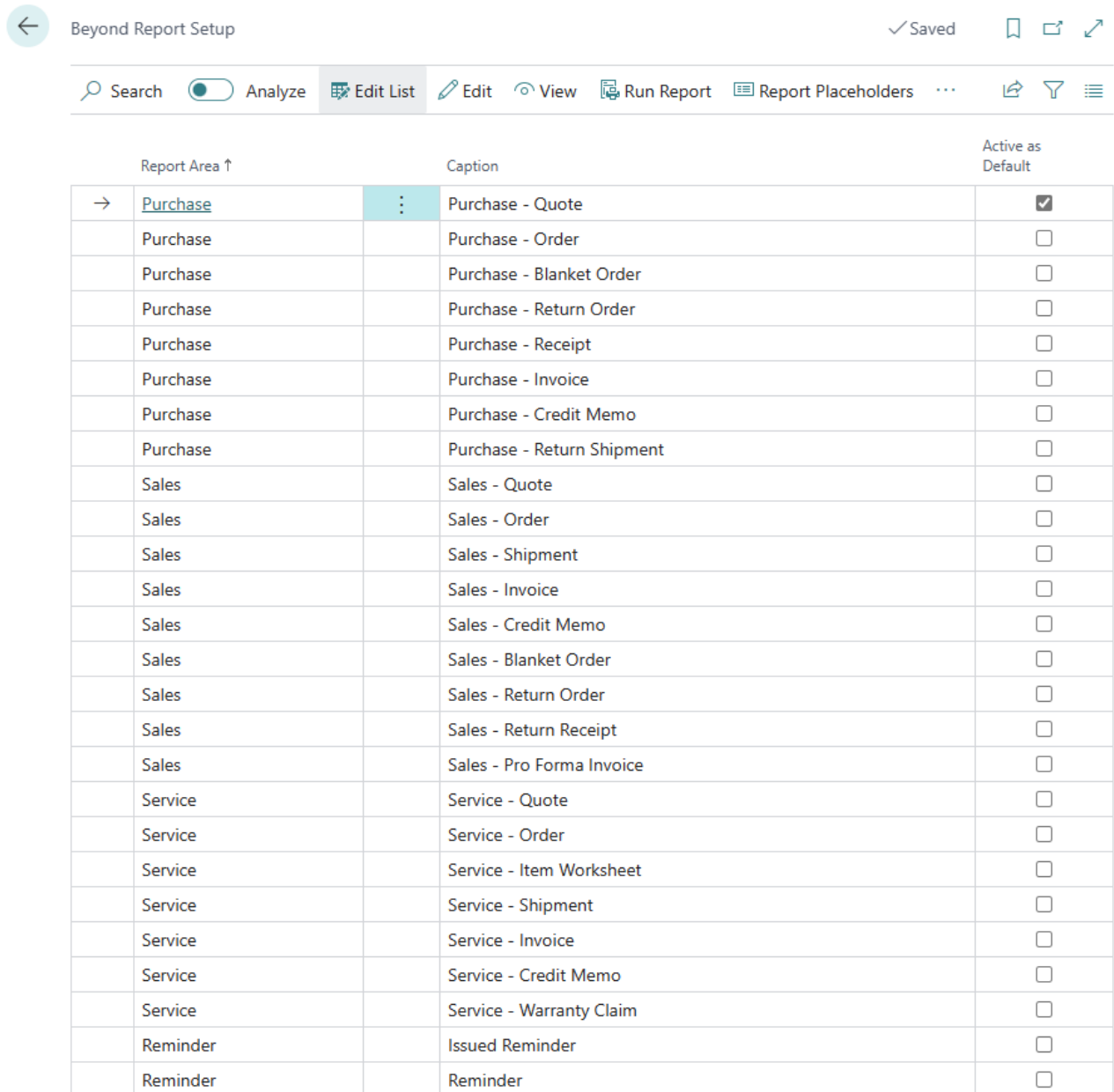
To save the picture and use it in the report, click **Save** in the menu bar. The preview of the report is updated.

# 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.



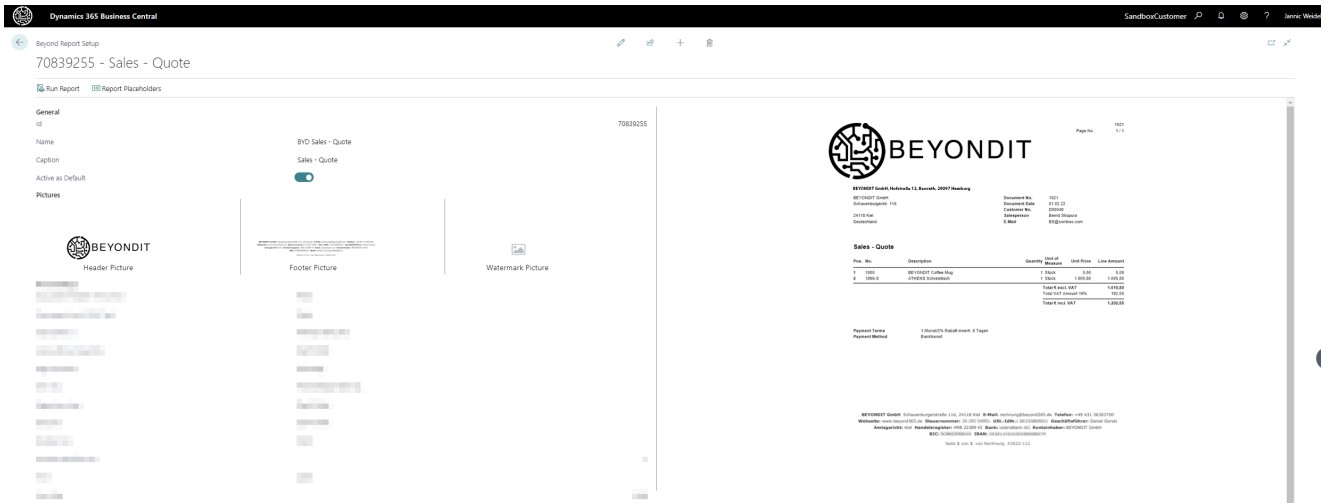
The screenshot shows the 'Beyond Report Setup' page. At the top, there is a navigation bar with a back arrow, the page title 'Beyond Report Setup', and a 'Saved' status. Below the navigation bar is a toolbar with icons for Search, Analyze, Edit List (highlighted), Edit, View, Run Report, Report Placeholders, and a menu icon. The main content is a table with the following columns: Report Area (with an upward arrow), Caption, and Active as Default (with a checkbox). The table lists various reports categorized by Report Area: Purchase, Sales, Service, and Reminder. The 'Purchase - Quote' report is selected, indicated by a blue highlight and a checkmark in the 'Active as Default' column.

Report Area ↑	Caption	Active as Default
→ Purchase	Purchase - Quote	<input checked="" type="checkbox"/>
Purchase	Purchase - Order	<input type="checkbox"/>
Purchase	Purchase - Blanket Order	<input type="checkbox"/>
Purchase	Purchase - Return Order	<input type="checkbox"/>
Purchase	Purchase - Receipt	<input type="checkbox"/>
Purchase	Purchase - Invoice	<input type="checkbox"/>
Purchase	Purchase - Credit Memo	<input type="checkbox"/>
Purchase	Purchase - Return Shipment	<input type="checkbox"/>
Sales	Sales - Quote	<input type="checkbox"/>
Sales	Sales - Order	<input type="checkbox"/>
Sales	Sales - Shipment	<input type="checkbox"/>
Sales	Sales - Invoice	<input type="checkbox"/>
Sales	Sales - Credit Memo	<input type="checkbox"/>
Sales	Sales - Blanket Order	<input type="checkbox"/>
Sales	Sales - Return Order	<input type="checkbox"/>
Sales	Sales - Return Receipt	<input type="checkbox"/>
Sales	Sales - Pro Forma Invoice	<input type="checkbox"/>
Service	Service - Quote	<input type="checkbox"/>
Service	Service - Order	<input type="checkbox"/>
Service	Service - Item Worksheet	<input type="checkbox"/>
Service	Service - Shipment	<input type="checkbox"/>
Service	Service - Invoice	<input type="checkbox"/>
Service	Service - Credit Memo	<input type="checkbox"/>
Service	Service - Warranty Claim	<input type="checkbox"/>
Reminder	Issued Reminder	<input type="checkbox"/>
Reminder	Reminder	<input type="checkbox"/>

BEYOND Reports Setup

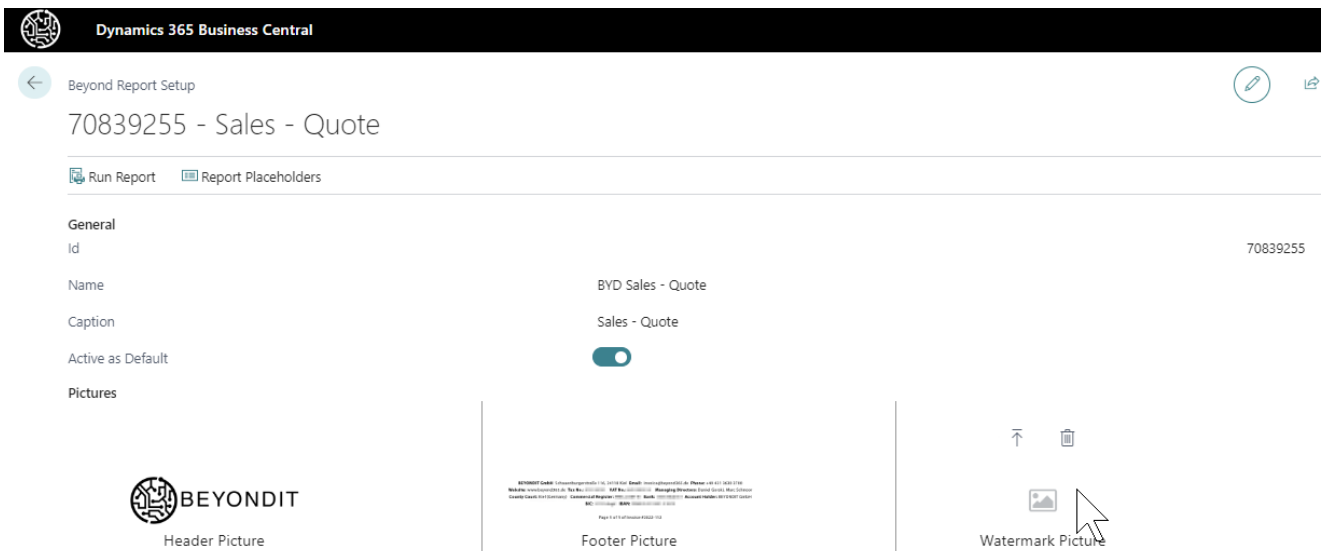
4. To change the watermark for a specific report, click on the value under the **Report Area** column in the displayed list. For the following description of the print settings, we have selected the **Sales - Quote** report card.
5. The report card is displayed. On the left side of the screen you will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






Set Watermark

- 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.



Options Menu for Watermark Picture

- In the options menu for the watermark picture, click the **Upload** icon .
- 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 (grayscale only), transparent background (if you use PNG)
- 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.

Dynamics 365 Business Central | SandborCustomer | Jemmy

Report Setup | 70839255 - Sales - Quote

Run Report | Report Placeholders

General


ID: 70839255


Name: BYD Sales - Quote


Caption: Sales - Quote

Active as Default:

Pictures

Header Picture: 

Footer Picture: 

Watermark Picture: 

Preview:

BEYONDIT GmbH, Mittelstraße 11, Borsdorf, 13077 Borsdorf

Document No.: 1011  
 Document Date: 11.02.20  
 Customer No.: 200000  
 Document No.: 8000  
 Document Date: 08.02.20

Sales - Quote

Item No.	Description	Quantity	Unit of Measure	Unit Price	Line Amount
1 1000	BYD10007 Carbon Mug	1	Stück	1,00	1,00
2 10004	BYD10004 Smartphone	1	Stück	1.800,00	1.800,00
				Tax € 445,15	445,15
				Tax € 100,00	100,00
				Tax € 885,15	885,15
				Tax € 200,00	200,00
				Tax € 685,15	685,15
				Tax € 1.200,00	1.200,00

Report Pages: 1 (Header) | 2 (Table) | 3 (Footer)

Payment Terms: 1 (Standard) | 2 (Special) | 3 (Other)

BEYONDIT GmbH, Mittelstraße 11, 13077 Borsdorf, Borsdorf@beyondit.de, Phone: +49 341 9438 3700  
 Webshop: www.beyondit.de, Tax No.: DE273000000, VAT No.: DE273000000, Managing Director: Christof Grottel, Hans Schöner  
 General Ledger: 400 (General) | 5000 (Bank) | 6000 (Revenue) | 7000 (Expense) | 8000 (Assets) | 9000 (Liabilities)

Page 1 of 1 of Items 4/2011 112


Uploaded Watermark

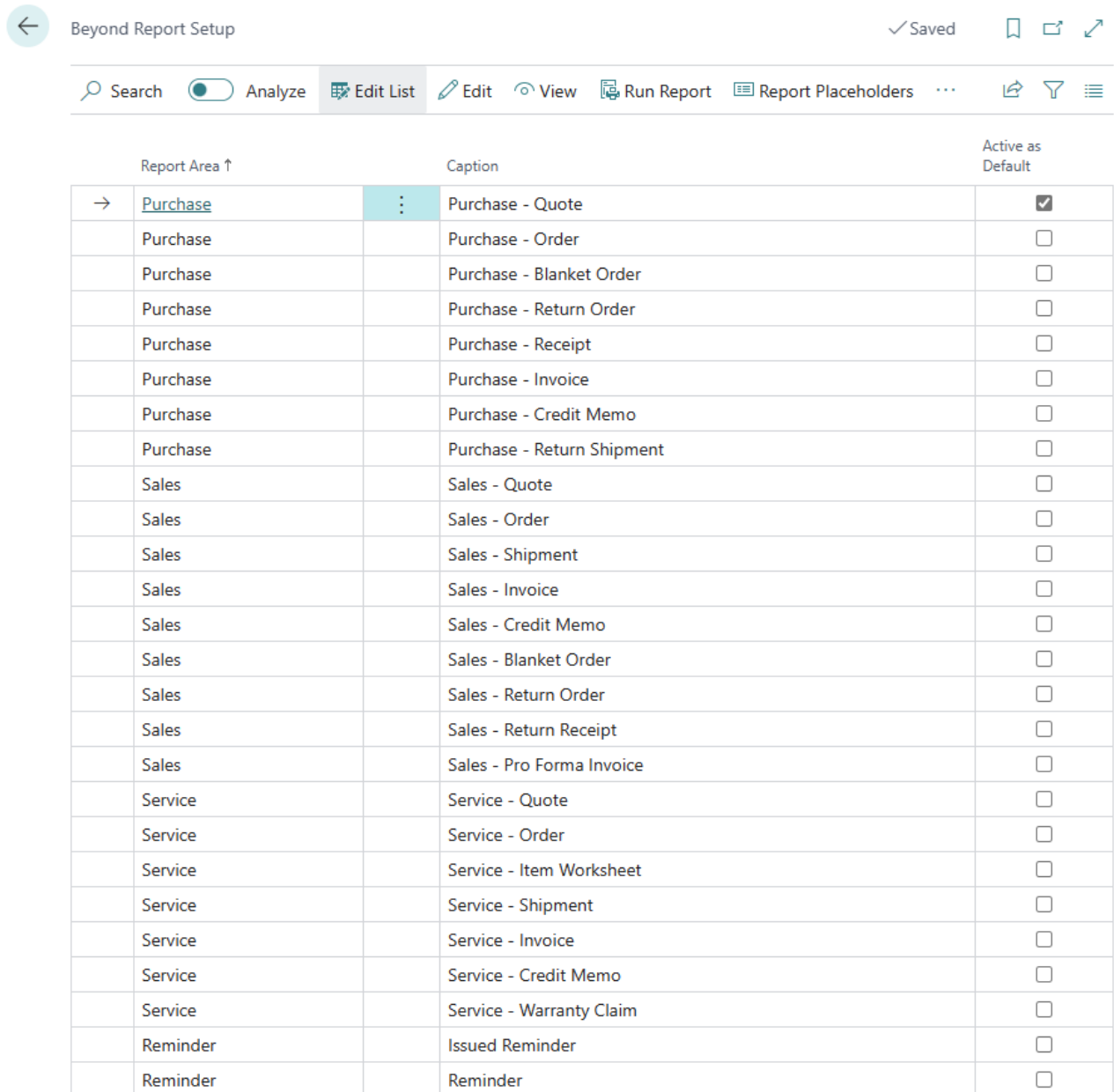
You have set the watermark picture for the selected report. Please note that this change is applied only to the selected report.

# 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 ↑	Report Area	Caption	Active as Default
→	<u>Purchase</u>	⋮ Purchase - Quote	<input checked="" type="checkbox"/>
	Purchase	Purchase - Order	<input type="checkbox"/>
	Purchase	Purchase - Blanket Order	<input type="checkbox"/>
	Purchase	Purchase - Return Order	<input type="checkbox"/>
	Purchase	Purchase - Receipt	<input type="checkbox"/>
	Purchase	Purchase - Invoice	<input type="checkbox"/>
	Purchase	Purchase - Credit Memo	<input type="checkbox"/>
	Purchase	Purchase - Return Shipment	<input type="checkbox"/>
	Sales	Sales - Quote	<input type="checkbox"/>
	Sales	Sales - Order	<input type="checkbox"/>
	Sales	Sales - Shipment	<input type="checkbox"/>
	Sales	Sales - Invoice	<input type="checkbox"/>
	Sales	Sales - Credit Memo	<input type="checkbox"/>
	Sales	Sales - Blanket Order	<input type="checkbox"/>
	Sales	Sales - Return Order	<input type="checkbox"/>
	Sales	Sales - Return Receipt	<input type="checkbox"/>
	Sales	Sales - Pro Forma Invoice	<input type="checkbox"/>
	Service	Service - Quote	<input type="checkbox"/>
	Service	Service - Order	<input type="checkbox"/>
	Service	Service - Item Worksheet	<input type="checkbox"/>
	Service	Service - Shipment	<input type="checkbox"/>
	Service	Service - Invoice	<input type="checkbox"/>
	Service	Service - Credit Memo	<input type="checkbox"/>
	Service	Service - Warranty Claim	<input type="checkbox"/>
	Reminder	Issued Reminder	<input type="checkbox"/>
	Reminder	Reminder	<input type="checkbox"/>

BEYOND Reports Setup

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

HTML Text on Document-Level

## 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 Texts – 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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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	1	Stück	5,00	5,00
2	1896-S	1	Stück	1.005,80	1.005,80
				<b>Total € excl. VAT</b>	<b>1.010,80</b>
				<b>Total VAT Amount 19%</b>	<b>192,05</b>
				<b>Total € incl. VAT</b>	<b>1.202,85</b>

HTML Text in Document Line

## 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 <span style="border: 1px solid red; padding: 2px;">Description 2</span>
2 1896-S	ATHENS Desk

"Print" Option

**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 <span style="border: 1px solid red; padding: 2px;">Description 2</span>

"Print as new Line" Option

## Lines Without Quantity

Use the print setting **Lines Without Quantity** to specify whether lines with the value **0** in the field **Quantity** (or no value 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

Print Lines without Quantity in Reports

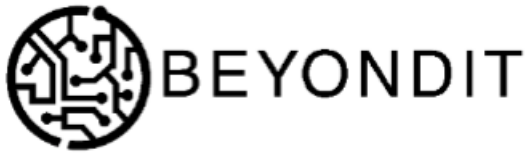
## Page Number

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 GmbH, Hofstraße 12, Benrath, 20097 Hamburg**

BEYONDIT GmbH  
Schauenburgerstr. 116

Document No. 1021  
Document Date 01.02.22

Print Page Numbers at the Top Right Corner of the Report

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

Page No. 1 / 1

Print Page Number at the Bottom Right Corner of the Report



## 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.



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	Fabrikam-01033541 BEYONDIT Coffee Mug	10	Stück	5,00	50,00
				<b>Total excl. VAT</b>	<b>50,00</b>
				Total VAT Amount 0%	0,00
				<b>Total incl. VAT</b>	<b>50,00</b>
Ship-to Address	CRONUS DE, Hofstraße 12, Benrath, 20097 Hamburg, Deutschland				
Payment Terms	Laufender Monat				

Print Vendor Item Numbers in the Report

## 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
<b>Total € excl. VAT</b>					<b>1.010,80</b>
<b>Total VAT Amount 19%</b>					<b>192,05</b>
<b>Total € incl. VAT</b>					<b>1.202,85</b>

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

_____ <b>Signature Employee</b>	_____ <b>Signature Customer</b>
------------------------------------	------------------------------------

Signature Areas in the Report

**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.

**BEYONDIT 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

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

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

\_\_\_\_\_  
**Signature Vendor**

Vendor Signature Area in Purchase Quote

**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

Employee Signature Area in Sales Quote

## 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 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

## Sales - Quote

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



Print Barcode in Report

## 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.

**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				

Report without Position Numbers

**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				

Report with Position Numbers

**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 Microsoft 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.

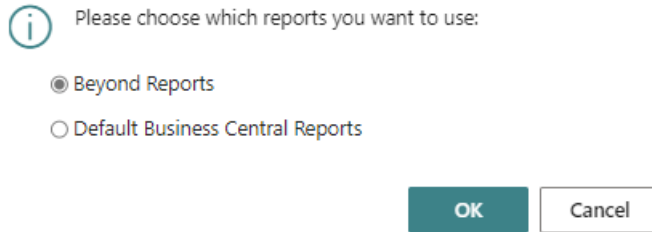
← Beyond Report Setup ✓ Saved   

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

Report Area ↑		Caption	Active as Default
→ Purchase		Purchase - Quote	<input checked="" type="checkbox"/>
Purchase		Purchase - Order	<input type="checkbox"/>
Purchase		Purchase - Blanket Order	<input type="checkbox"/>
Purchase		Purchase - Return Order	<input type="checkbox"/>
Purchase		Purchase - Receipt	<input type="checkbox"/>
Purchase		Purchase - Invoice	<input type="checkbox"/>
Purchase		Purchase - Credit Memo	<input type="checkbox"/>
Purchase		Purchase - Return Shipment	<input type="checkbox"/>
Sales		Sales - Quote	<input type="checkbox"/>
Sales		Sales - Order	<input type="checkbox"/>
Sales		Sales - Shipment	<input type="checkbox"/>
Sales		Sales - Invoice	<input type="checkbox"/>
Sales		Sales - Credit Memo	<input type="checkbox"/>
Sales		Sales - Blanket Order	<input type="checkbox"/>
Sales		Sales - Return Order	<input type="checkbox"/>
Sales		Sales - Return Receipt	<input type="checkbox"/>
Sales		Sales - Pro Forma Invoice	<input type="checkbox"/>
Service		Service - Quote	<input type="checkbox"/>
Service		Service - Order	<input type="checkbox"/>
Service		Service - Item Worksheet	<input type="checkbox"/>
Service		Service - Shipment	<input type="checkbox"/>
Service		Service - Invoice	<input type="checkbox"/>
Service		Service - Credit Memo	<input type="checkbox"/>
Service		Service - Warranty Claim	<input type="checkbox"/>
Reminder		Issued Reminder	<input type="checkbox"/>
Reminder		Reminder	<input type="checkbox"/>

BEYOND Reports Setup

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



Dialog Box to set default reports

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 GmbH, Hofstraße 12, Benrath, 20097 Hamburg

BEYONDIT GmbH  
Schauenburgerstr. 116  
24118 Kiel  
Deutschland

Document No. 1021  
Document Date 01.02.22  
Customer No. 000040  
Salesperson Bernd Skapura  
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 Schreibisch	1	Stück	1.005,80	1.005,80
				<b>Total € excl. VAT</b>	<b>1.010,80</b>
				Total VAT Amount 19%	192,05
				<b>Total € incl. VAT</b>	<b>1.202,85</b>

Placeholders in Reports


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
→ <a href="#">Purchase</a>	⋮	Purchase - Quote	<input checked="" type="checkbox"/>
Purchase		Purchase - Order	<input type="checkbox"/>
Purchase		Purchase - Blanket Order	<input type="checkbox"/>
Purchase		Purchase - Return Order	<input type="checkbox"/>
Purchase		Purchase - Receipt	<input type="checkbox"/>
Purchase		Purchase - Invoice	<input type="checkbox"/>
Purchase		Purchase - Credit Memo	<input type="checkbox"/>
Purchase		Purchase - Return Shipment	<input type="checkbox"/>
Sales		Sales - Quote	<input type="checkbox"/>
Sales		Sales - Order	<input type="checkbox"/>
Sales		Sales - Shipment	<input type="checkbox"/>
Sales		Sales - Invoice	<input type="checkbox"/>
Sales		Sales - Credit Memo	<input type="checkbox"/>
Sales		Sales - Blanket Order	<input type="checkbox"/>
Sales		Sales - Return Order	<input type="checkbox"/>
Sales		Sales - Return Receipt	<input type="checkbox"/>
Sales		Sales - Pro Forma Invoice	<input type="checkbox"/>
Service		Service - Quote	<input type="checkbox"/>
Service		Service - Order	<input type="checkbox"/>
Service		Service - Item Worksheet	<input type="checkbox"/>
Service		Service - Shipment	<input type="checkbox"/>
Service		Service - Invoice	<input type="checkbox"/>
Service		Service - Credit Memo	<input type="checkbox"/>
Service		Service - Warranty Claim	<input type="checkbox"/>
Reminder		Issued Reminder	<input type="checkbox"/>
Reminder		Reminder	<input type="checkbox"/>

## BEYOND Reports Setup

- 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.
- The report card is displayed.
- Click **Report Placeholder** in the menu bar.
- The **Placeholder** page is displayed.
- Click in the input field for the **Placeholder** column and define a placeholder (e.g. %1 or <DOCUMENTNO>).
- Click in the input field for the **Field No.** column and extend the dropdown list.
- To see the complete list of available fields whose field values you can reference, click **Select from full list**.

## Select - Fields Lookup



No. ↑	Field Name	Field Caption
→ 11	Your Reference	Your Reference
12	Ship-to Code	Ship-to Code
13	Ship-to Name	Ship-to Name
14	Ship-to Name 2	Ship-to Name 2
15	Ship-to Address	Ship-to Address
16	Ship-to Address 2	Ship-to Address 2
17	Ship-to City	Ship-to City
18	Ship-to Contact	Ship-to Contact
19	Order Date	Order Date
20	Posting Date	Posting Date
21	Shipment Date	Shipment Date
22	Posting Description	Posting Description
23	Payment Terms Code	Payment Terms Code
24	Due Date	Due Date
25	Payment Discount %	Payment Discount %
26	Pmt. Discount Date	Pmt. Discount Date
27	Shipment Method Code	Shipment Method Code

Referencable Fields

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.

## Edit - Report Placeholders



Manage

Placeholder ↑	Field No.	Field Caption
%1	11	Your Reference
%2	3	No.
%3	5	Bill-to Name
→ <DOCUMENTNO>	3	No.

Defined Placeholders

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.

Page No. 1 / 1

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BEYONDIT GmbH  
Schauenburgerstr. 116  
24118 Kiel  
Deutschland

Document No. 1021  
Document Date 01.02.22  
Customer No. 000040  
Salesperson Bernd Skopura  
E-Mail BS@contoso.com

Document No. 1021  
Document Date 01.02.22  
Customer No. 000040  
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Page No. 1 / 1

BEYONDIT GmbH, Hofstraße 12, Benrath, 20097 Hamburg

BEYONDIT GmbH  
Schauenburgerstr. 116  
24118 Kiel  
Deutschland

Document No. 1021  
Document Date 01.02.22  
Customer No. 000040  
Salesperson Bernd Skopura  
E-Mail BS@contoso.com

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

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 Schreibzettel	1	Stück	1.005,80	1.005,80
Total € excl. VAT					1.010,80


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

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 Schreibzettel	1	Stück	1.005,80	1.005,80
Total € excl. VAT					1.010,80

Placeholder in a Field Caption

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 (see [Figure: Defined Placeholders](#) for %2 placeholder). 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
→ <u>Purchase</u>	⋮	Purchase - Quote	<input checked="" type="checkbox"/>
Purchase		Purchase - Order	<input type="checkbox"/>
Purchase		Purchase - Blanket Order	<input type="checkbox"/>
Purchase		Purchase - Return Order	<input type="checkbox"/>
Purchase		Purchase - Receipt	<input type="checkbox"/>
Purchase		Purchase - Invoice	<input type="checkbox"/>
Purchase		Purchase - Credit Memo	<input type="checkbox"/>
Purchase		Purchase - Return Shipment	<input type="checkbox"/>
Sales		Sales - Quote	<input type="checkbox"/>
Sales		Sales - Order	<input type="checkbox"/>
Sales		Sales - Shipment	<input type="checkbox"/>
Sales		Sales - Invoice	<input type="checkbox"/>
Sales		Sales - Credit Memo	<input type="checkbox"/>
Sales		Sales - Blanket Order	<input type="checkbox"/>
Sales		Sales - Return Order	<input type="checkbox"/>
Sales		Sales - Return Receipt	<input type="checkbox"/>
Sales		Sales - Pro Forma Invoice	<input type="checkbox"/>
Service		Service - Quote	<input type="checkbox"/>
Service		Service - Order	<input type="checkbox"/>
Service		Service - Item Worksheet	<input type="checkbox"/>
Service		Service - Shipment	<input type="checkbox"/>
Service		Service - Invoice	<input type="checkbox"/>
Service		Service - Credit Memo	<input type="checkbox"/>
Service		Service - Warranty Claim	<input type="checkbox"/>
Reminder		Issued Reminder	<input type="checkbox"/>
Reminder		Reminder	<input type="checkbox"/>

BEYOND Reports Setup

- Click on the corresponding report (in our example **Sales - Quote**). The report card will be displayed.
- Scroll down to the **Custom Report Captions** tab.
- 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).
- Click in the input field in the **Language Code** column and enter the language code (for English enter **ENU**).
- 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).

Custom Report Captions | Manage 🔗 📄

Field ↑		New Language Code ↑	New Caption
→ Report Title	⋮	ENU	Quote %2

Placeholder in Field Caption

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:

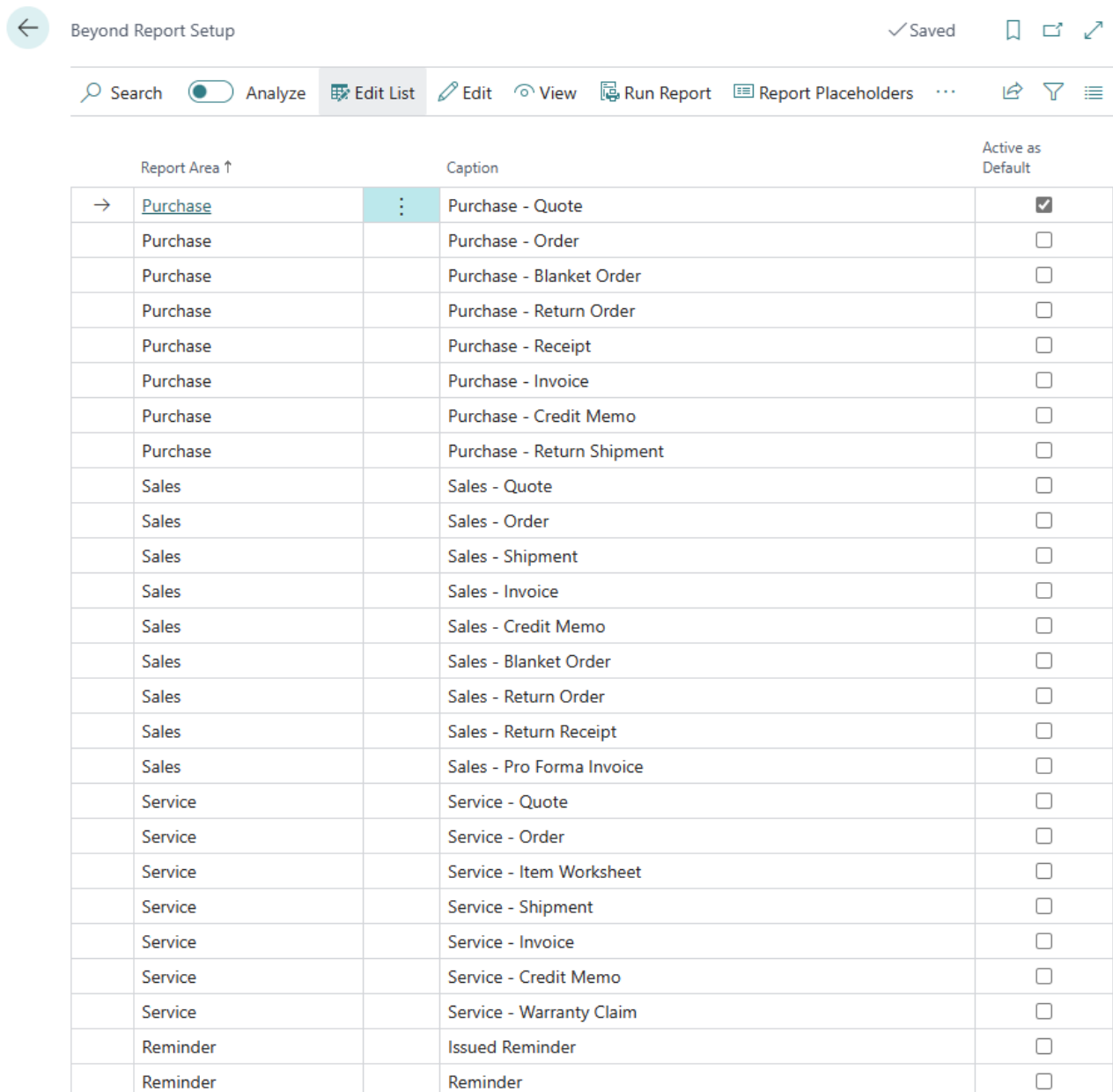
- [Display and Position Fields in Reports](#)
- [Edit Field Captions](#)




## 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.



← Beyond Report Setup ✓ Saved   

Search  Analyze  Edit List  Edit  View  Run Report  Report Placeholders  ⋮   

Report Area ↑		Caption	Active as Default
→ <a href="#">Purchase</a>		Purchase - Quote	<input checked="" type="checkbox"/>
Purchase		Purchase - Order	<input type="checkbox"/>
Purchase		Purchase - Blanket Order	<input type="checkbox"/>
Purchase		Purchase - Return Order	<input type="checkbox"/>
Purchase		Purchase - Receipt	<input type="checkbox"/>
Purchase		Purchase - Invoice	<input type="checkbox"/>
Purchase		Purchase - Credit Memo	<input type="checkbox"/>
Purchase		Purchase - Return Shipment	<input type="checkbox"/>
Sales		Sales - Quote	<input type="checkbox"/>
Sales		Sales - Order	<input type="checkbox"/>
Sales		Sales - Shipment	<input type="checkbox"/>
Sales		Sales - Invoice	<input type="checkbox"/>
Sales		Sales - Credit Memo	<input type="checkbox"/>
Sales		Sales - Blanket Order	<input type="checkbox"/>
Sales		Sales - Return Order	<input type="checkbox"/>
Sales		Sales - Return Receipt	<input type="checkbox"/>
Sales		Sales - Pro Forma Invoice	<input type="checkbox"/>
Service		Service - Quote	<input type="checkbox"/>
Service		Service - Order	<input type="checkbox"/>
Service		Service - Item Worksheet	<input type="checkbox"/>
Service		Service - Shipment	<input type="checkbox"/>
Service		Service - Invoice	<input type="checkbox"/>
Service		Service - Credit Memo	<input type="checkbox"/>
Service		Service - Warranty Claim	<input type="checkbox"/>
Reminder		Issued Reminder	<input type="checkbox"/>
Reminder		Reminder	<input type="checkbox"/>

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:

Field Placement | Manage ↗ ↻


Top Left ▼

	Field		Font Size
→	Address	⋮	8,00
	Report Title		12,00

Display and Place 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.

Page No. 1 / 1



1

**BEONDIT GmbH, Hofstraße 12, Benrath, 20097 Hamburg**

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

2

<b>Document No.</b>	1001
<b>Document Date</b>	01.02.22
<b>Vendor No.</b>	10000

**Purchase - Quote**

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

3

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

---

Signature Employee

Available Placement Areas for Header Fields


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.

← Beyond Report Setup ✓ Saved   

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

Report Area ↑		Caption	Active as Default
→ Purchase		Purchase - Quote	<input checked="" type="checkbox"/>
Purchase		Purchase - Order	<input type="checkbox"/>
Purchase		Purchase - Blanket Order	<input type="checkbox"/>
Purchase		Purchase - Return Order	<input type="checkbox"/>
Purchase		Purchase - Receipt	<input type="checkbox"/>
Purchase		Purchase - Invoice	<input type="checkbox"/>
Purchase		Purchase - Credit Memo	<input type="checkbox"/>
Purchase		Purchase - Return Shipment	<input type="checkbox"/>
Sales		Sales - Quote	<input type="checkbox"/>
Sales		Sales - Order	<input type="checkbox"/>
Sales		Sales - Shipment	<input type="checkbox"/>
Sales		Sales - Invoice	<input type="checkbox"/>
Sales		Sales - Credit Memo	<input type="checkbox"/>
Sales		Sales - Blanket Order	<input type="checkbox"/>
Sales		Sales - Return Order	<input type="checkbox"/>
Sales		Sales - Return Receipt	<input type="checkbox"/>
Sales		Sales - Pro Forma Invoice	<input type="checkbox"/>
Service		Service - Quote	<input type="checkbox"/>
Service		Service - Order	<input type="checkbox"/>
Service		Service - Item Worksheet	<input type="checkbox"/>
Service		Service - Shipment	<input type="checkbox"/>
Service		Service - Invoice	<input type="checkbox"/>
Service		Service - Credit Memo	<input type="checkbox"/>
Service		Service - Warranty Claim	<input type="checkbox"/>
Reminder		Issued Reminder	<input type="checkbox"/>
Reminder		Reminder	<input type="checkbox"/>

BEYOND Reports Setup

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.

Custom Report Captions | Manage ↶ ↷

Field ↑	New Language Code ↑	New Caption
→ Salesperson / Purchaser	ENU	Employee

Edited Field Caption

You have edited the field caption.

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

Page No. 1 / 1



**BEYONDIT**

BEYONDIT GmbH, Hofstraße 12, Benrath, 20057 Hamburg  
BEYONDIT GmbH  
Schauenburgerstr. 116  
24118 Kiel  
Deutschland

Document No.	1021
Document Date	01.02.22
Customer No.	D00040
<b>Employee</b>	Bernd Skopura
E-Mail	BS@contoso.com

**Sales - Quote**



Edited Field Caption in the Live Preview

[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



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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

## Quote 1021

This is the document-level pre-text.



Pos. No.	Description	Quantity	Unit of Measure	Unit Price	Line Amount
1	1000 This is the line-level pre-text. BEYONDIT Coffee Mug This is the line-level post-text.	1	Stück	5,00	5,00
2	1896-S ATHENS Schreibtisch	1	Stück	1.005,80	1.005,80
<b>Total € excl. VAT</b>					<b>1.010,80</b>
<b>Total VAT Amount 19%</b>					<b>192,05</b>
<b>Total € incl. VAT</b>					<b>1.202,85</b>

This is the document-level post-text.

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

Signature Customer


Explanation Text Type

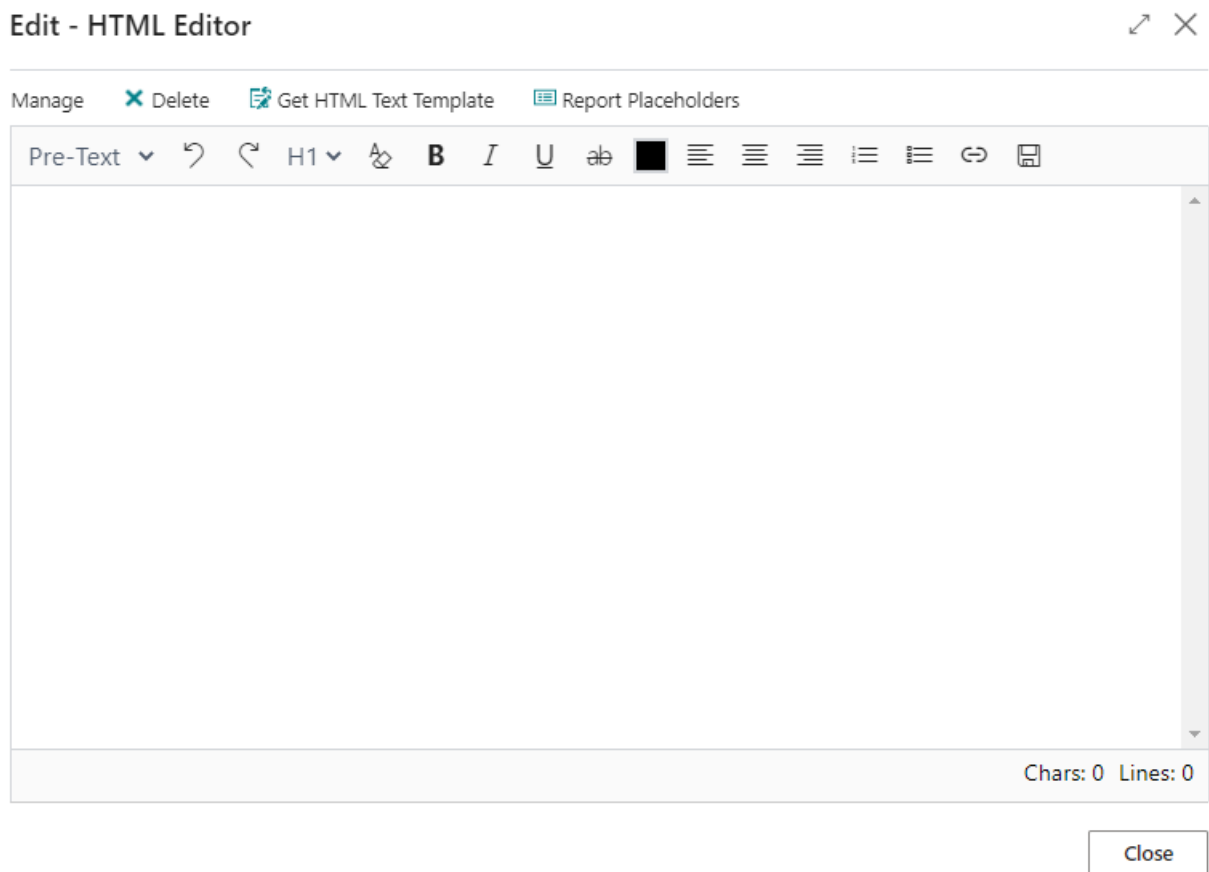
# Create Document-Level Pre-Text

This section describes how to create a **document-level pre-text (1)** (see [Figure: Explanation text type](#)) 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](#) ([Figure: Defined placeholders: Placeholder %2](#)).












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.



HTML Editor

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:

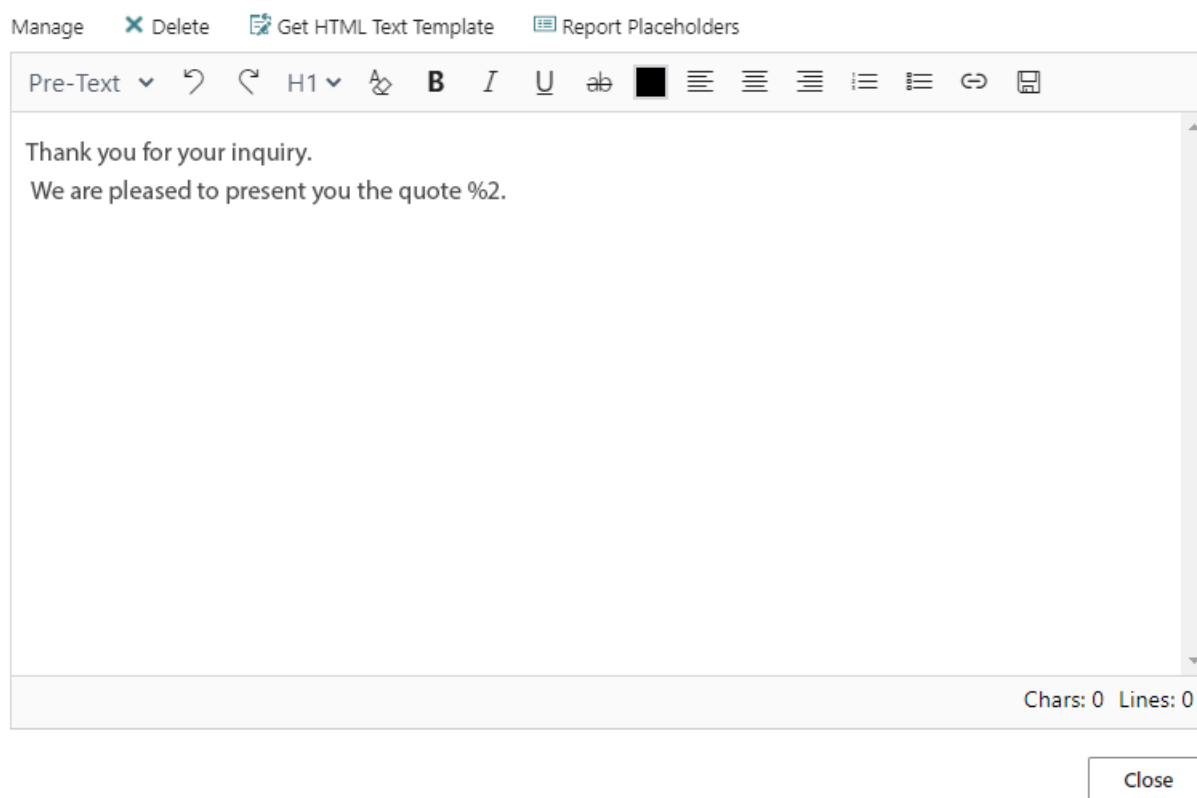
Button	Description
	This option allows you to <b>undo</b> changes to the formatting of the entered text.
	This option allows you to <b>repeat</b> changes to the formatting of the entered text after previously undoing them.
H1	This option allows you to format a <b>headline</b> in the text. You have 6 predefined heading levels to choose from.
	This option allows you delete a formatting for a text. Select the text for which you want to <b>delete the formatting</b> and click on this button.
<b>B</b>	With this option you can format text in <b>bold</b> . Select the text for which you want to use <b>bold formatting</b> and click on this button.
<i>I</i>	With this option you can format text in <b>italic</b> . Select the text for which you want to use <b>italic formatting</b> and click on this button.
<u>U</u>	With this option you can <b>underline</b> text. Select the text for which you want to use <b>underlined formatting</b> and click on this button.
<del>ab</del>	With this option you can <b>cross out</b> text. Select the text which you want to <b>cross out</b> and click on this button.
	With this option you can <b>color</b> text. Select the text which you want to <b>color</b> , click on this icon and choose a color.
	With this option you can <b>left-justify</b> text. Select the text which you want to <b>left-justify</b> and click on this button.
	With this option you can <b>center-justify</b> text. Select the text which you want to <b>center-justify</b> and click on this button.
	With this option you can <b>right-justify</b> text. Select the text which you want to <b>right-justify</b> and click on this button.
	This button allows you to format text with a <b>numbering</b> . Select the text you want to format with a numbering and click this button.
	This button allows you to format text as <b>enumeration</b> . Select the text you want to format as a bulleted list and click this button.
	This button allows you to format text as a <b>link</b> . 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 <b>http://</b> , <b>https://</b> , or <b>www.</b> and ends with a top-level domain (e.g. .de, .com, etc.).
	This button is used to <b>save</b> 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.



Add Document-Level Pre-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**.

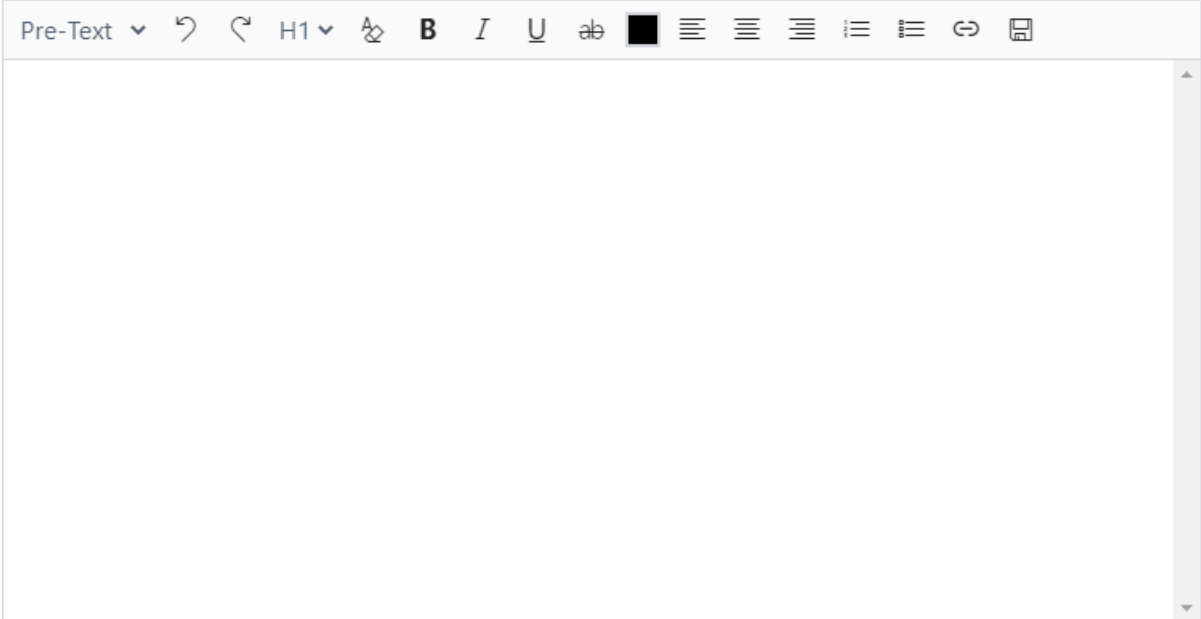
You have created a document-specific pre-text with a placeholder. This text will be used exclusively for this particular report. For more information on how to create texts that will be used for all documents of a document type, see the [Create HTML Text Template](#) chapter. The text templates can be 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)** (see [Figure: Explanation Text Type](#)).

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.












Manage  Delete  Get HTML Text Template  Report Placeholders


Pre-Text    H1   **B** *I* U         

Chars: 0 Lines: 0

## HTML Editor

- 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.
- 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 <b>undo</b> changes to the formatting of the entered text.
	This option allows you to <b>repeat</b> changes to the formatting of the entered text after previously undoing them.
H1	This option allows you to format a <b>headline</b> 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 <b>delete the formatting</b> and click on this button.
<b>B</b>	With this option you can format text in <b>bold</b> . Select the text for which you want to use <b>bold formatting</b> and click on this button.
<i>I</i>	With this option you can format text in <b>italic</b> . Select the text for which you want to use <b>italic formatting</b> and click on this button.
<u>U</u>	With this option you can <b>underline</b> text. Select the text for which you want to use <b>underlined formatting</b> and click on this button.
<del>ab</del>	With this option you can <b>cross out</b> text. Select the text which you want to <b>cross out</b> and click on this button.
	With this option you can <b>color</b> text. Select the text which you want to <b>color</b> , click on this icon and choose a color.
	With this option you can <b>left-justify</b> text. Select the text which you want to <b>left-justify</b> and click on this button.
	With this option you can <b>center-justify</b> text. Select the text which you want to <b>center-justify</b> and click on this button.
	With this option you can <b>right-justify</b> text. Select the text which you want to <b>right-justify</b> and click on this button.
	This button allows you to format text with a <b>numbering</b> . Select the text you want to format with a numbering and click this button.
	This button allows you to format text as <b>enumeration</b> . Select the text you want to format as a bulleted list and click this button.
	This button allows you to format text as a <b>link</b> . 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 <b>http://</b> , <b>https://</b> , or <b>www.</b> and ends with a top-level domain (e.g. .de, .com, etc.).
	This button is used to <b>save</b> any changes to the text.


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

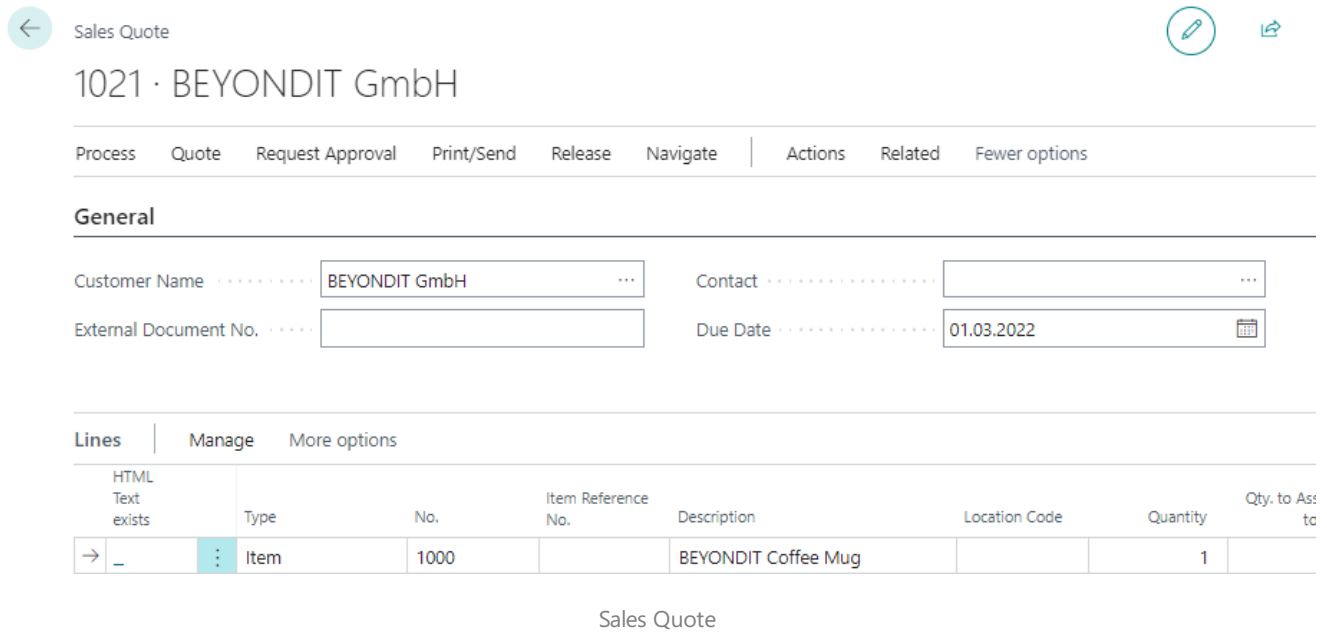
You have created a document-level post-text. This text will be used exclusively for this particular report. For more information on how to create texts that are used for all documents of a document type, see the [Create HTML Text Templates](#) chapter.

# Create Line-Level Pre-Text

This section describes how to create a **line-level pre-text (2)** (see [Figure: Explanation Text Type](#)).

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.




Sales Quote

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Process Quote Request Approval Print/Send Release Navigate Actions Related Fewer options

**General**




Customer Name ..... BEYONDIT GmbH ... Contact ..... ...

External Document No. .... External Document No. .... Due Date ..... 01.03.2022 

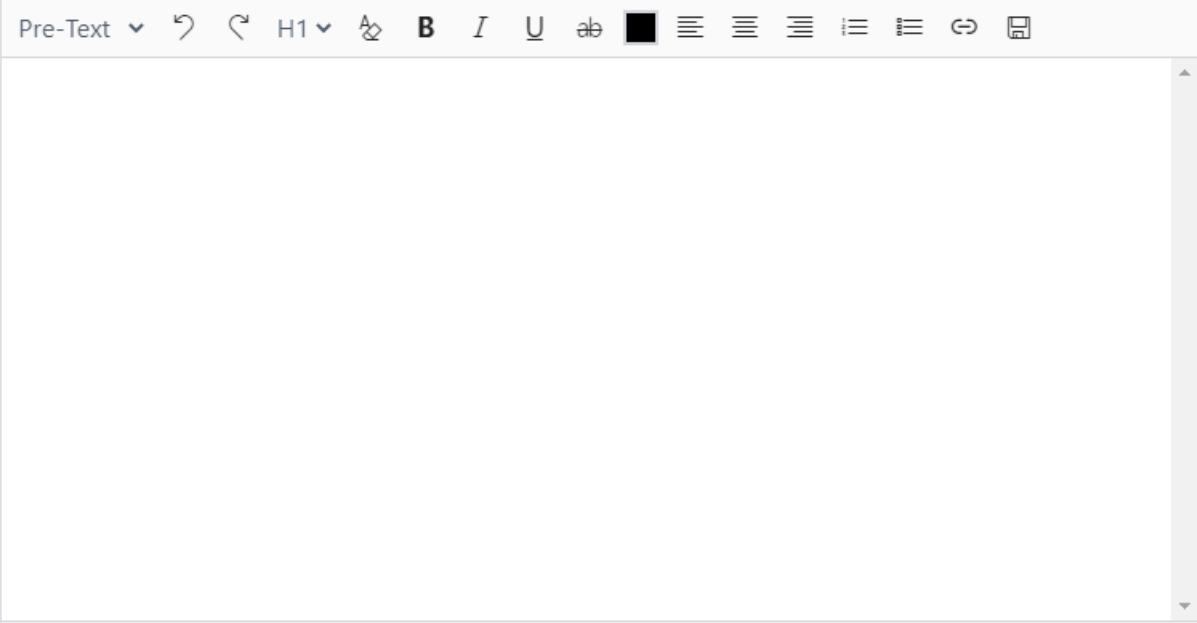
**Lines** | Manage More options








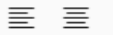



HTML Text exists	Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Ass. tc
	Item	1000		BEYONDIT Coffee Mug		1	

Sales Quote

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 bottom 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.














Manage  Delete  Get HTML Text Template  Report Placeholders

Pre-Text    H1   **B** *I* U      

Chars: 0 Lines: 0

## HTML Editor

- 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.
- Enter the text in the input field. You can use the following options to format the text:

Button	Description
	This option allows you to <b>undo</b> changes to the formatting of the entered text.
	This option allows you to <b>repeat</b> changes to the formatting of the entered text after previously undoing them.
H1	This option allows you to format a <b>headline</b> 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 <b>delete the formatting</b> and click on this button.
<b>B</b>	With this option you can format text in <b>bold</b> . Select the text for which you want to use <b>bold formatting</b> and click on this button.
<i>I</i>	With this option you can format text in <b>italic</b> . Select the text for which you want to use <b>italic formatting</b> and click on this button.
<u>U</u>	With this option you can <b>underline</b> text. Select the text for which you want to use <b>underlined formatting</b> and click on this button.
<del>ab</del>	With this option you can <b>cross out</b> text. Select the text which you want to <b>cross out</b> and click on this button.
	With this option you can <b>color</b> text. Select the text which you want to <b>color</b> , click on this icon and choose a color.
	With this option you can <b>left-justify</b> text. Select the text which you want to <b>left-justify</b> and click on this button.
	With this option you can <b>center-justify</b> text. Select the text which you want to <b>center-justify</b> and click on this button.
	With this option you can <b>right-justify</b> text. Select the text which you want to <b>right-justify</b> and click on this button.
	This button allows you to format text with a <b>numbering</b> . Select the text you want to format with a numbering and click this button.
	This button allows you to format text as <b>enumeration</b> . Select the text you want to format as a bulleted list and click this button.
	This button allows you to format text as a <b>link</b> . 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 <b>http://</b> , <b>https://</b> , or <b>www.</b> and ends with a top-level domain (e.g. .de, .com, etc.).
	This button is used to <b>save</b> 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**.

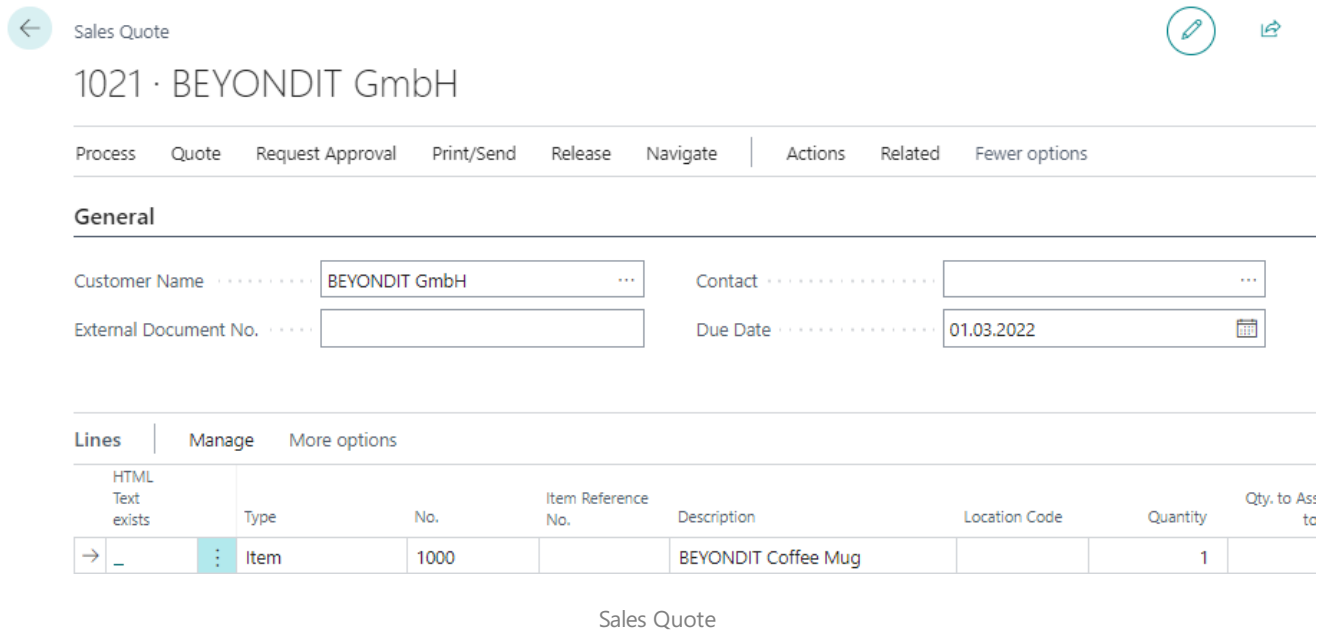
You have added a line-level pre-text to a document.

# Create Line-Level Post-Text

This section describes how to create a **line-level post-text (3)** (see [Figure: Explanation text type](#)).

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.




Sales Quote

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
Process Quote Request Approval Print/Send Release Navigate Actions Related Fewer options

**General**




Customer Name ..... BEYONDIT GmbH ... Contact ..... .....


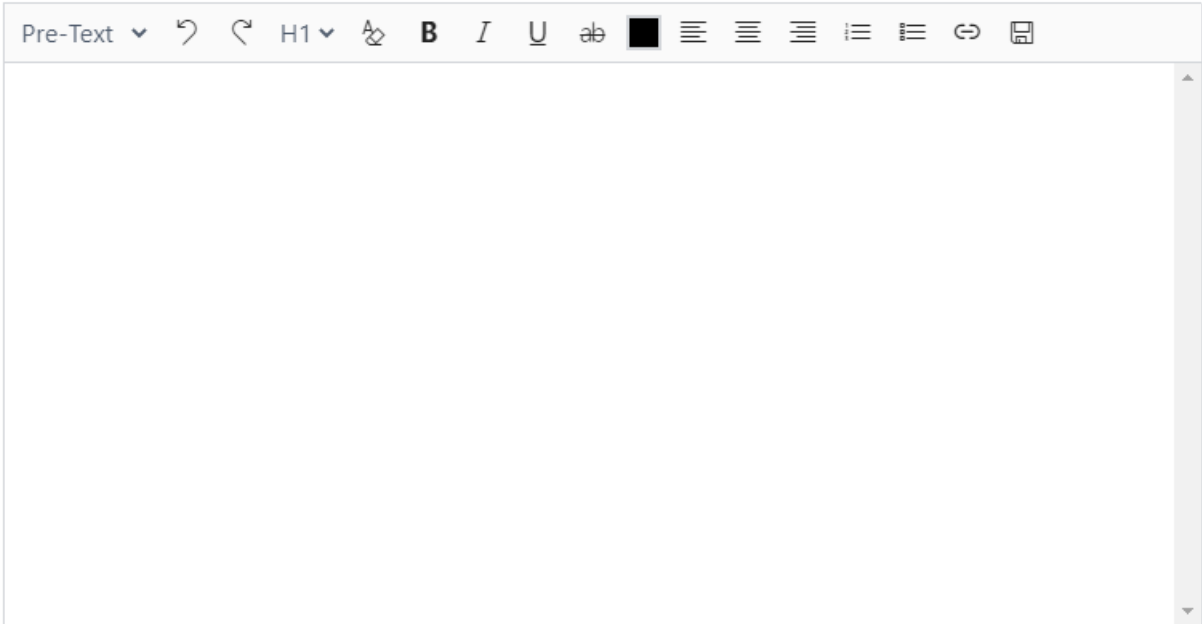
External Document No. .... External Document No. .... Due Date ..... 01.03.2022 

**Lines** | Manage More options

HTML Text exists	Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Ass. tc
→ 	Item	1000		BEYONDIT Coffee Mug		1	

Sales Quote












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.

Manage  Delete  Get HTML Text Template  Report Placeholders

Chars: 0 Lines: 0

## HTML Editor

- 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.
- Enter the text in the input field. You can use the following options to format the text:

Button	Description
	This option allows you to <b>undo</b> changes to the formatting of the entered text.
	This option allows you to <b>repeat</b> changes to the formatting of the entered text after previously undoing them.
H1	This option allows you to format a <b>headline</b> 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 <b>delete the formatting</b> and click on this button.
<b>B</b>	With this option you can format text in <b>bold</b> . Select the text for which you want to use <b>bold formatting</b> and click on this button.
<i>I</i>	With this option you can format text in <b>italic</b> . Select the text for which you want to use <b>italic formatting</b> and click on this button.
<u>U</u>	With this option you can <b>underline</b> text. Select the text for which you want to use <b>underlined formatting</b> and click on this button.
<del>ab</del>	With this option you can <b>cross out</b> text. Select the text which you want to <b>cross out</b> and click on this button.
	With this option you can <b>color</b> text. Select the text which you want to <b>color</b> , click on this icon and choose a color.
	With this option you can <b>left-justify</b> text. Select the text which you want to <b>left-justify</b> and click on this button.
	With this option you can <b>center-justify</b> text. Select the text which you want to <b>center-justify</b> and click on this button.
	With this option you can <b>right-justify</b> text. Select the text which you want to <b>right-justify</b> and click on this button.
	This button allows you to format text with a <b>numbering</b> . Select the text you want to format with a numbering and click this button.
	This button allows you to format text as <b>enumeration</b> . Select the text you want to format as a bulleted list and click this button.
	This button allows you to format text as a <b>link</b> . 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 <b>http://</b> , <b>https://</b> , or <b>www.</b> and ends with a top-level domain (e.g. .de, .com, etc.).
	This button is used to <b>save</b> 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**.

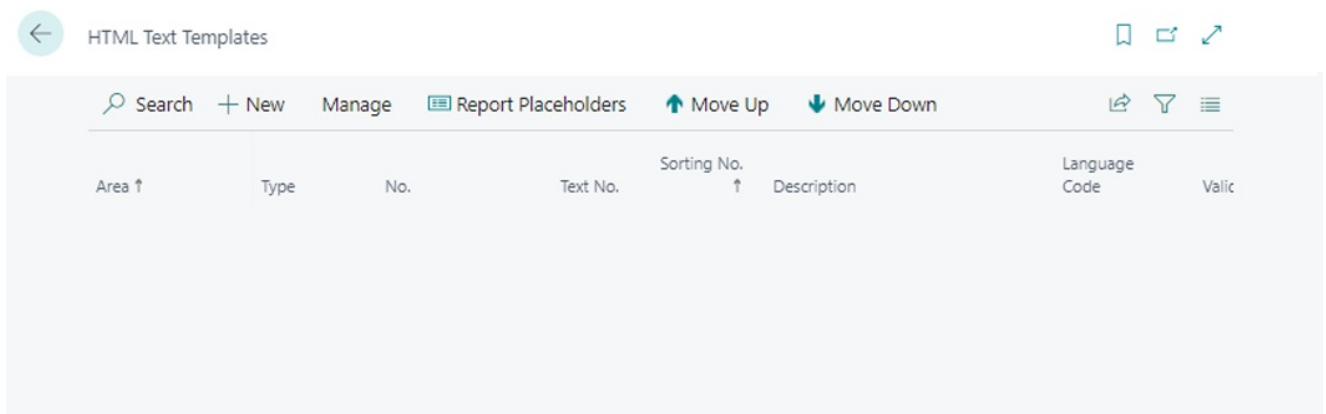
You have added a line-level post-text to a document.

# 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.



HTML Text Templates

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



# HTML Text Template Purchase 0

Report Placeholders

## General

Area	<input type="text" value="Purchase"/>	Text No.	<input type="text" value="0"/>
Type	<input type="text"/>	Sorting No.	<input type="text" value="0"/>
No.	<input type="text"/>	Description	<input type="text"/>

## Parameters

Language Code	<input type="text"/>	Valid to	<input type="text"/>
Valid from	<input type="text"/>	Deactivate Default Te...	<input type="checkbox"/>
		Automatic Insert	<input type="checkbox"/>

## Document Settings

Quote	<input type="checkbox"/>	Credit Memo	<input type="checkbox"/>
Order	<input type="checkbox"/>	Blanket Order	<input type="checkbox"/>
Invoice	<input type="checkbox"/>	Return Order	<input type="checkbox"/>

HTML Editor | [Delete](#)

Pre-Text  Undo  Redo  H1  **B** *I* U

Create HTML Text Template

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

Field	Description
	From the dropdown list choose the value for the <b>Area</b> field:
<b>Area</b>	<b>Purchase:</b> The text template is used for purchase documents. <b>Sales:</b> The text template is used for sales documents. <b>Service:</b> The text template is used for service documents.
<b>Type</b>	In addition to setting the (business) area, you can additionally define that the HTML text template should be used when a specific <b>vendor</b> , <b>customer</b> or <b>item</b> is used in the report.
<b>No.</b>	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 <b>General</b> area in the Type field).
<b>Text No.</b>	In this field you enter the ID number for the text.
<b>Sorting No.</b>	In this field you specify the sorting number for the sequence in case of multiple texts/HTML text templates. Here, the value <b>1</b> corresponds to the first position in the sequence.
<b>Description</b>	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
<b>Language Code</b>	In this field you define the language for the HTML text template.
<b>Valid from</b>	In this field you define the start date for the usage of the HTML text template.
<b>Valid to</b>	In this field you define the end date for the usage of the HTML text template.
<b>Deactivate Default Template</b>	Use this slider to specify whether to disable default report templates.
<b>Automatic Insert</b>	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.





# HTML Text Template Sales Customer 10000 1 Sales

## Report Placeholders

### General

Area	Sales	Text No.	1
Type	Customer	Sorting No.	1
No.	10000	Description	Sales

### Parameters

Language Code	ENU	Valid to	31.12.2022
Valid from	15.12.2022	Deactivate Default Te...	<input checked="" type="checkbox"/>
		Automatic Insert	<input checked="" type="checkbox"/>

### Document Settings

Quote	<input checked="" type="checkbox"/>	Credit Memo	<input checked="" type="checkbox"/>
Order	<input checked="" type="checkbox"/>	Blanket Order	<input checked="" type="checkbox"/>
Invoice	<input checked="" type="checkbox"/>	Return Order	<input checked="" type="checkbox"/>

### HTML Editor













[Delete](#)

Pre-Text   H1  **B** *I* U

We wish you a merry Christmas and a happy new year.

### HTML Text Template

- 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.
- Enter the text in the input field. You can use the following options to format the text:

Button	Description
	This option allows you to <b>undo</b> changes to the formatting of the entered text.
	This option allows you to <b>repeat</b> changes to the formatting of the entered text after previously undoing them.
H1	This option allows you to format a <b>headline</b> 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 <b>delete the formatting</b> and click on this button.
<b>B</b>	With this option you can format text in <b>bold</b> . Select the text for which you want to use <b>bold formatting</b> and click on this button.
<i>I</i>	With this option you can format text in <b>italic</b> . Select the text for which you want to use <b>italic formatting</b> and click on this button.
<u>U</u>	With this option you can <b>underline</b> text. Select the text for which you want to use <b>underlined formatting</b> and click on this button.
	With this option you can <b>cross out</b> text. Select the text which you want to <b>cross out</b> and click on this button.
	With this option you can <b>color</b> text. Select the text which you want to <b>color</b> , click on this icon and choose a color.
	With this option you can <b>left-justify</b> text. Select the text which you want to <b>left-justify</b> and click on this button.
	With this option you can <b>center-justify</b> text. Select the text which you want to <b>center-justify</b> and click on this button.
	With this option you can <b>right-justify</b> text. Select the text which you want to <b>right-justify</b> and click on this button.
	This button allows you to format text with a <b>numbering</b> . Select the text you want to format with a numbering and click this button.
	This button allows you to format text as <b>enumeration</b> . Select the text you want to format as a bulleted list and click this button.
	This button allows you to format text as a <b>link</b> . 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 <b>http://</b> , <b>https://</b> , or <b>www.</b> and ends with a top-level domain (e.g. .de, .com, etc.).
	This button is used to <b>save</b> any changes to the text.


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

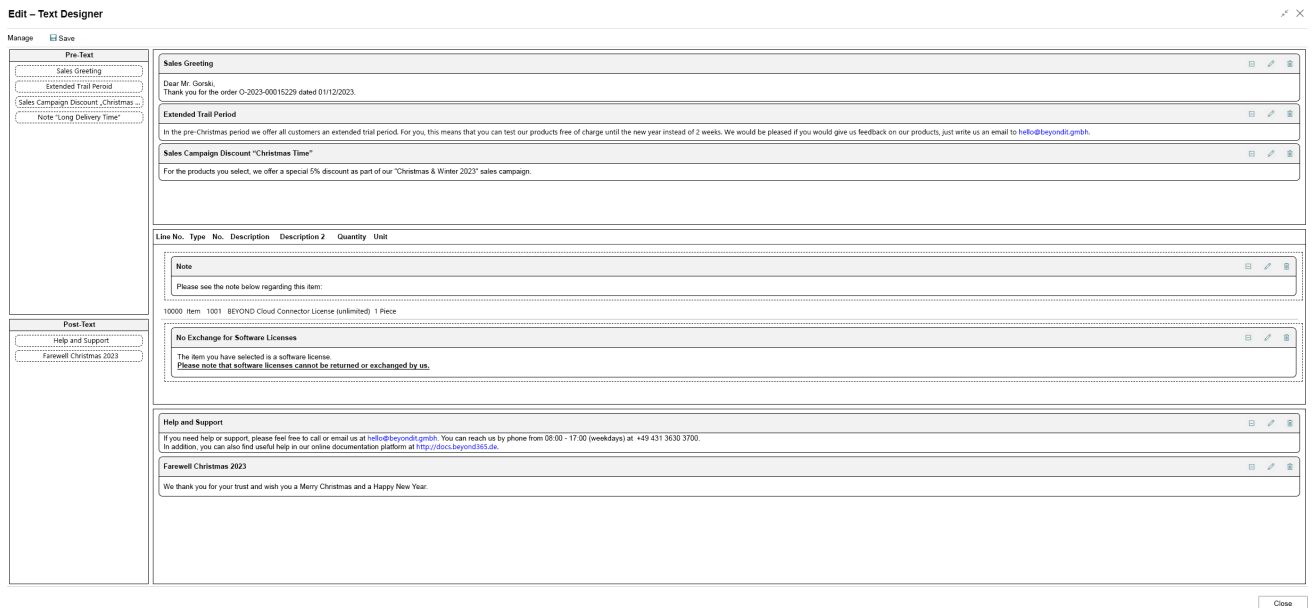
You have created an HTML text template. This can be loaded into the HTML editor for documents (if the template settings on the HTML text template card are set correctly) via the **Get HTML Text Template** button.

# 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.



Text Designer

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
→ <u>Purchase</u>	:	Purchase - Quote	<input checked="" type="checkbox"/>
Purchase		Purchase - Order	<input type="checkbox"/>
Purchase		Purchase - Blanket Order	<input type="checkbox"/>
Purchase		Purchase - Return Order	<input type="checkbox"/>
Purchase		Purchase - Receipt	<input type="checkbox"/>
Purchase		Purchase - Invoice	<input type="checkbox"/>
Purchase		Purchase - Credit Memo	<input type="checkbox"/>
Purchase		Purchase - Return Shipment	<input type="checkbox"/>
Sales		Sales - Quote	<input type="checkbox"/>
Sales		Sales - Order	<input type="checkbox"/>
Sales		Sales - Shipment	<input type="checkbox"/>
Sales		Sales - Invoice	<input type="checkbox"/>
Sales		Sales - Credit Memo	<input type="checkbox"/>
Sales		Sales - Blanket Order	<input type="checkbox"/>
Sales		Sales - Return Order	<input type="checkbox"/>
Sales		Sales - Return Receipt	<input type="checkbox"/>
Sales		Sales - Pro Forma Invoice	<input type="checkbox"/>
Service		Service - Quote	<input type="checkbox"/>
Service		Service - Order	<input type="checkbox"/>
Service		Service - Item Worksheet	<input type="checkbox"/>
Service		Service - Shipment	<input type="checkbox"/>
Service		Service - Invoice	<input type="checkbox"/>
Service		Service - Credit Memo	<input type="checkbox"/>
Service		Service - Warranty Claim	<input type="checkbox"/>
Reminder		Issued Reminder	<input type="checkbox"/>
Reminder		Reminder	<input type="checkbox"/>

## BEYOND Reports Setup

- 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.
- The report card is displayed.
- Scroll down to the **Custom Report Captions** tab.
- From the dropdown menu under the **Field** column, select **Free Text**.
- 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
→ <u>Purchase</u>	⋮	Purchase - Quote	<input checked="" type="checkbox"/>
Purchase		Purchase - Order	<input type="checkbox"/>
Purchase		Purchase - Blanket Order	<input type="checkbox"/>
Purchase		Purchase - Return Order	<input type="checkbox"/>
Purchase		Purchase - Receipt	<input type="checkbox"/>
Purchase		Purchase - Invoice	<input type="checkbox"/>
Purchase		Purchase - Credit Memo	<input type="checkbox"/>
Purchase		Purchase - Return Shipment	<input type="checkbox"/>
Sales		Sales - Quote	<input type="checkbox"/>
Sales		Sales - Order	<input type="checkbox"/>
Sales		Sales - Shipment	<input type="checkbox"/>
Sales		Sales - Invoice	<input type="checkbox"/>
Sales		Sales - Credit Memo	<input type="checkbox"/>
Sales		Sales - Blanket Order	<input type="checkbox"/>
Sales		Sales - Return Order	<input type="checkbox"/>
Sales		Sales - Return Receipt	<input type="checkbox"/>
Sales		Sales - Pro Forma Invoice	<input type="checkbox"/>
Service		Service - Quote	<input type="checkbox"/>
Service		Service - Order	<input type="checkbox"/>
Service		Service - Item Worksheet	<input type="checkbox"/>
Service		Service - Shipment	<input type="checkbox"/>
Service		Service - Invoice	<input type="checkbox"/>
Service		Service - Credit Memo	<input type="checkbox"/>
Service		Service - Warranty Claim	<input type="checkbox"/>
Reminder		Issued Reminder	<input type="checkbox"/>
Reminder		Reminder	<input type="checkbox"/>

BEYOND Reports Setup

- 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.
- The report card is displayed.
- Scroll down to the **Field Placement** tab.
- From the dropdown menu, select the area where you want to add the free text:



Add Free Text to Report Template

- **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.

BEYONDIT 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

 2  
 Free text

 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 (%S) 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
				<b>Total € excl. VAT</b>	<b>1.010,80</b>
				Total VAT Amount 19%	192,05
				<b>Total € incl. VAT</b>	<b>1.202,85</b>

 3  
 Payment Terms 1 Monat/2% Rabatt innerh. 6 Tagen  
 Payment Method Banktransit  
 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.: VAT No.: Managing Directors: Daniel Gorski, Marc Schmoor  
 County Court: Kiel (Germany) Commercial Register: Bank: Account Holder: BEYONDIT GmbH  
 BIC: IBAN:

Available Areas for Field Placement

 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	<h1></h1>	Enter the text which you want to format as <b>Heading 1</b> enclosed in the tags. Example: <h1>Heading 1</h1>
Heading 2	<h2></h2>	Enter the text which you want to format as <b>Heading 2</b> enclosed in the tags. Example: <h2>Heading 2</h2>
Heading 3	<h3></h3>	Enter the text which you want to format as <b>Heading 3</b> enclosed in the tags. Example: <h3>Heading 3</h3>
Heading 4	<h4></h4>	Enter the text which you want to format as <b>Heading 4</b> enclosed in the tags. Example: <h4>Heading 4</h4>
Heading 5	<h5></h5>	Enter the text which you want to format as <b>Heading 5</b> enclosed in the tags. Example: <h5>Heading 5</h5>
Heading 6	<h6></h6>	Enter the text which you want to format as <b>Heading 6</b> enclosed in the tags. Example: <h6>Heading 6</h6>

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

Page No. 1 / 2



BEYONDIT 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**



Comparison of Headings in a Report (place top left)

# 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
<b>Line Break</b>	<code>&lt;br&gt;</code>	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 <code>&lt;br&gt;</code> 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
<b>Red</b>	<code>&lt;font color="red"&gt;&lt;/color&gt;</code>	Example: <code>&lt;font color="red"&gt;Red&lt;/font&gt;</code>
<b>Blue</b>	<code>&lt;font color="blue"&gt;&lt;/color&gt;</code>	Example: <code>&lt;font color="blue"&gt;Blue&lt;/font&gt;</code>
<b>Green</b>	<code>&lt;font color="green"&gt;&lt;/color&gt;</code>	Example: <code>&lt;font color="green"&gt;Green&lt;/font&gt;</code>
<b>Yellow</b>	<code>&lt;font color="yellow"&gt;&lt;/color&gt;</code>	Example: <code>&lt;font color="yellow"&gt;Yellow&lt;/font&gt;</code>
<b>Orange</b>	<code>&lt;font color="orange"&gt;&lt;/color&gt;</code>	Example: <code>&lt;font color="orange"&gt;Orange&lt;/font&gt;</code>


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](https://www.w3schools.com/html/html_color_attributes.asp) 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	<code>&lt;font color="#FF0000"&gt;&lt;/color&gt;</code>	Example: <code>&lt;font color="FF0000"&gt;Red&lt;/font&gt;</code>
Blue	<code>&lt;font color="0000FF"&gt;&lt;/color&gt;</code>	Example: <code>&lt;font color="0000FF"&gt;Blue&lt;/font&gt;</code>
Green	<code>&lt;font color="00FF00"&gt;&lt;/color&gt;</code>	Example: <code>&lt;font color="00FF00"&gt;Green&lt;/font&gt;</code>
Yellow	<code>&lt;font color="FFFF00"&gt;&lt;/color&gt;</code>	Example: <code>&lt;font color="FFFF00"&gt;Yellow&lt;/font&gt;</code>
Orange	<code>&lt;font color="#FFA500"&gt;&lt;/color&gt;</code>	Example: <code>&lt;font color="#FFA500"&gt;Orange&lt;/font&gt;</code>

The website [w3schools](#) offers a hexadecimal color picker/generator. You can determine the exact color there via the tool .

## HTML Color Picker

[← Previous](#)

[Next >](#)



Pick a Color:

Selected Color:

Lighter / Darker:

Or Enter a Color:

Color value  OK

Or Use HTML5:

Hue

Color Picker of w3schools

Lighter / Darker	Hex Value
100%	#ffffff
95%	#edf3f7
90%	#dbe7f0
85%	#c9dbe8
80%	#b8cfe0
75%	#a6c3d9
70%	#94b7d1
65%	#82abc9
60%	#709ec2
58%	#6b9abf
55%	#5e92ba
50%	#4d86b3
45%	#4579a1
40%	#3d6b8f
35%	#365e7d
30%	#2e516b
25%	#264359
20%	#1f3647
15%	#172836
10%	#0f1b24
5%	#080d12
0%	#000000

## 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
<b>Bold</b>	<code>&lt;b&gt;&lt;/b&gt;</code>	Enter the text that you want to format enclosed in the bold tags in the input field. Example: The word <code>&lt;b&gt;bold&lt;/b&gt;</code> 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
<b>Italic</b>	<code>&lt;i&gt;&lt;/i&gt;</code>	Enter the text that you want to format enclosed in the italic tags in the input field. Example: The word <code>&lt;i&gt;italic&lt;/i&gt;</code> 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
<b>Underlined</b>	<code>&lt;u&gt;&lt;/u&gt;</code>	Enter the text that you want to format enclosed in the underlined tags in the input field. Example: The word <code>&lt;u&gt;underlined&lt;/u&gt;</code> will be underlined.