

## BEYOND REPORTS

# **User Guide**



### **BEYONDIT GmbH**

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### **BEYOND Reports**

### **About This Extension**

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

### **BEYONDIT GmbH**

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

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

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

### **Supported Reports**

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

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

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

#### **Documentation Information**

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

### Assign User Permissions

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

Permission Set	Description
BYD REPORTS ADMIN	<ul> <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>
BYD REPORTS USER	<ul> <li>Create and edit HTML texts</li> <li>Create and edit HTML text templates</li> <li>Create reports with BEYOND Reports</li> </ul>
BYD REPORTS READER	<ul> <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.

General Company Name		CRONU	IS DE		Show Domain Name	•••••••			
Home Browse	More options								
🔄 Permissions 🛛 🖻	Copy Permission Set.								
ers	×		Permission Set 1		Name	Extension Name 🐨	All Us	iers	ADMIN
	×	$\rightarrow$	Permission Set † BYD REPORTS ADMIN	:	Name BeyondReports Admin	Extension Name 🐨 BeyondReports	All Us		ADMIN
ers er list by: dension Name		$\rightarrow$		1			All Us		

- 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.

#### **O** NOTE

#### **General Setup**

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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**) **D**.
- 3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.

₽ Se	earch  Analyze	🐯 Edit List	🖉 Edit 💿 View 🗟 Run Report 💷 Report Placeholders \cdots	¢7 =
	Report Area ↑		Caption	Active as Default
$\rightarrow$	Purchase	:	Purchase - Quote	
	Purchase		Purchase - Order	
	Purchase		Purchase - Blanket Order	
	Purchase		Purchase - Return Order	
	Purchase		Purchase - Receipt	
	Purchase		Purchase - Invoice	
	Purchase		Purchase - Credit Memo	
	Purchase		Purchase - Return Shipment	
	Sales		Sales - Quote	
	Sales		Sales - Order	
	Sales		Sales - Shipment	
	Sales		Sales - Invoice	
	Sales		Sales - Credit Memo	
	Sales		Sales - Blanket Order	
	Sales		Sales - Return Order	
	Sales		Sales - Return Receipt	
	Sales		Sales - Pro Forma Invoice	
	Service		Service - Quote	
	Service		Service - Order	
	Service		Service - Item Worksheet	
	Service		Service - Shipment	
	Service		Service - Invoice	
	Service		Service - Credit Memo	
	Service		Service - Warranty Claim	
	Reminder		Issued Reminder	
	Reminder		Reminder	

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

5. The Reports Setup Wizard is displayed.

#### **Reports Setup Wizard**

ŝ				
Welcome to the Bey This wizard will allow	rond Reports Setup v you to setup all repo	rts at once.		
Warning Please be aware that	all settings for all rep	orts will be over	written by this	s process!
Let's go! Click next to continu	e.			
	Suggest Values	Back	Next	Finish

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

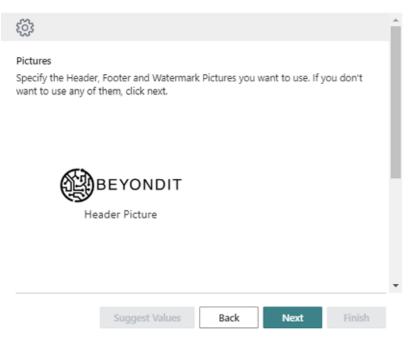
R	Reports Setup Wizard	2	$\times$	
5	<u>8</u>			Â
S	ictures pecify the Header, Footer and Watermark Pictures you want to use. If you o rant to use any of them, click next.	don't		
	Header Picture			
	Suggest Values Back Next	Finis	h	

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

**Footer Picture** – 2480×531 px, PNG file with transparent background **Watermark** – 800×800 px, JPEG or PNG file (only grayscale)

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#### **Reports Setup Wizard**



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	2 X	J
		^
Print Settings Select how you want the reports to be printed.		l
Document Header HTML Text	~	
Document Line HTML Text Don't Print	~	
Description 2 · · · · · · Don't Print	~	
Lines without Quantity Don't Print	~	
Page Number · · · · · · Don't Print	~	1
Item No. Print	~	
Signature Area Don't Print	~	
Parsada Don't Print	v	•
Suggest Values Back Next	Finish	

- 10. To automatically apply a default setup for the print settings, click the **Suggest Values** option.
- 11. The following options are available for manual and individual report print settings:

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

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

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

#### **Reports Setup Wizard**

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દ્ર્ડ્રે						
	m Captions custom captio	ns for	the report fields,	if needed.		
Custor	m Captions $\smallsetminus$					
F	Field 1		New Language Code †	New Caption		
$\rightarrow$						
		Sug	gest Values	Back	Next	Finish

- 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 $\checkmark \times$								
र्दे								
Custom Captions Setup custom captions for the report fields, if needed. Custom Captions ~								
Field	1 Î	New Language Code↑	New Caption					
Ver	käufer / E	DEU	Mitarbeiter					
$\rightarrow$ Ver	käufer / E	ENU	Employee					
	Su	ggest Values	Back Next	Finish				

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.

#### **Reports Setup Wizard**

7	$\sim$
	X

	acement where the header fields should acement ~ .ft	be placed	d in the report	printout.
	Field			Font Size
$\rightarrow$	Report Title			8,00

- 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**.

Reports Setup Wizard		2	$\times$
$\checkmark$			
Finished! Click the finish button to apply these settings to	all reports.		
Suggest Values	ack Next	Finish	

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.

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-	d Report Setup			
∕⊃ se	earch 💽 Analyze	取 Edit List	🖉 Edit 💿 View 🗟 Run Report 💷 Report Placeholders \cdots	¢ 7 :
	Report Area ↑		Caption	Active as Default
$\rightarrow$	Purchase	÷	Purchase - Quote	<ul><li>✓</li></ul>
	Purchase		Purchase - Order	
	Purchase		Purchase - Blanket Order	
	Purchase		Purchase - Return Order	
	Purchase		Purchase - Receipt	
	Purchase		Purchase - Invoice	
	Purchase		Purchase - Credit Memo	
	Purchase		Purchase - Return Shipment	
	Sales		Sales - Quote	
	Sales		Sales - Order	
	Sales		Sales - Shipment	
	Sales		Sales - Invoice	
	Sales		Sales - Credit Memo	
	Sales		Sales - Blanket Order	
	Sales		Sales - Return Order	
	Sales		Sales - Return Receipt	
	Sales		Sales - Pro Forma Invoice	
	Service		Service - Quote	
	Service		Service - Order	
	Service		Service - Item Worksheet	
	Service		Service - Shipment	
	Service		Service - Invoice	
	Service		Service - Credit Memo	
	Service		Service - Warranty Claim	
	Reminder		Issued Reminder	
	Reminder		Reminder	

- 4. 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.

#### Beyond Report Setup

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

OK Cancel

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

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

### License Management

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

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

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

		6	? ⊮ + ≣				0 0
yond License Managemer	nt						
nt ID							
it Domain Name							
censes 🛛 🌐 Sync License							LÊ.
Company Name 1	Application Name	Status	Start Date	Expiry Date	Trial	Licensed Metric	Current Me
>	BeyondCalculation	Valid	23.08.2024 08:50	22.09.2030 08:50		1	
	BeyondServiceRequisition	Valid	02.04.2024 09:13	02.05.2030 09:13		1	
	BeyondPostCalculation	Valid	14.08.2024 00:33	13.09.2030 00:33		1	
	BeyondReportPreview	Valid	15.07.2024 21:26	14.08.2030 21:26		1	
	BeyondService	Valid	30.01.2024 07:41	28.02.2030 07:41		7	
	BeyondCues	Valid	29.11.2023 19:15	28.02.2030 07:41		7	
	Beyond Inventory Details	Valid	29.01.2024 23:28	28.02.2030 07:41		7	
	BeyondDataImporter	Valid	17.06.2024 22:55	17.07.2030 22:55		1	
	BeyondCloudConnector	Valid	04.07.2024 06:42	03.08.2030 06:42		1	
	BeyondAttributesCore	Valid	14.06.2024 07:51	14.07.2030 07:51		1	
	BeyondReports	Valid	05.07.2024 06:39	04.08.2030 06:39		1	
	BeyondDocumentLineTransfer	Valid	18.09.2024 20:40	31.12.2099 00:00		4	

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

Column	Description
Company Name	This column indicates the name of the company.
Application Name	This column indicates the name of the application. If you use several BeyondIT products, a separate line is displayed for each product in the overview,
Status	This is the status of the product license. Several values are possible: <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.
Start Date	This is the date on which the product license was registered.
Expiry Date	This is the date on which the product license becomes or became invalid. The application can no longer be used.
Trial	This checkbox indicates whether the product license is a trial license. Trial licenses are very limited licenses. You can purchase a full product license after the trial license expires (note the value in the <b>Expiry date</b> column).
Licensed Metric	This column shows how the application was licensed. For example, this can be a tenant license, a license per company or a license per user.
Current Metric	This column shows how many licenses are used in the environment. The difference between the values in the <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) D.
- 3. Search for the Beyond Reports Setup page and click on the corresponding search result.



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

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

Dynamics 365 Business Central										
Beyond Report Setup 70839255 - Sales - Quote			<sup>1</sup>	Ê						
🔯 Run Report 🛛 💷 Report Placeholders										
General Id			70839255						Page No.	1021 1/1
Name	BYD Sales - Quote									
Caption	Sales - Quote				REYONDIT Gradu	4, Hofstraße 12, Baurath, 20097 Hambs				
Active as Default					BEYCNOFF Generi Schauenburgerch		Document No. Document Date Cestomer No.	01.82.22		
Pictures		1			24118 Kei Deutschland		Salesperson P-Mail	Band Skou Bilgourisis	19 1 CBM	
					Sales - Quot					
					Pes. No.	Description	Que	antity Unit of L		
	2	2			1 1300 2 1395-5	8Exch2FC Collee Mug ATHENG Schreblisch				5.60
								Total C excl. VM Total XX7 Amon		1,040,00 192,05
Header Picture	Footer Picture	Watermark Picture						Total € Incl. VA	a	1,202,85

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

	Dynamics 365 Business Central			
$\leftarrow$	Beyond Report Setup			Ø ¢
	70839255 - Sales - Quote			
	🗟 Run Report 💷 Report Placeholders			
	General Id			70839255
	Name	BYD Sales - Quote		
	Caption	Sales - Quote		
	Active as Default			
	Pictures			
	↑ 🗊			
	Header Pictur잗	Footer Picture	Watermark Picture	
		0		

- 7. In the options menu for the header picture, click the **Upload** icon  $\textcircled{\bullet}$ .
- 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.

Dynamics 365 Business Central				5. Contract (1997)
<ul> <li>Beyond Report Setup</li> <li>70839255 - Sales - Quote</li> </ul>				
🗟 Run Report 🛛 🕮 Report Placeholders				
General Id			70839255	
Name	BYD Sales - Quote			BEYONDIT
Caption	Sales - Quote			REVONCET GrobH, Hefstenike 12, Benneth, 20097 Hamburg
Active as Default				61Y-00001 0mbm Document No. 501 Schwerburgent 150 Document Dete 91222 Custome Was 02008
Pictures	1	E.		21110 Kui Salespenson Eenit (Fraguessa Deutschand Fraguessa Fraguessa
				Sales - Quote
BEYONDIT				Print         Decomposition         Guidenty         Control to the Amount           1         Million 4000000         1         Static         Static         Static           1         Static         ATDODD Constation         1         Static         Static         Static           1         Static         1         Static         Static         Static         Static           1         Static         1         Static         Static         Static         Static           1         Static         1         Static         Static         Static         Static
Header Picture	Footer Picture	Watermark Picture		Total 4 inc. 197 520,85

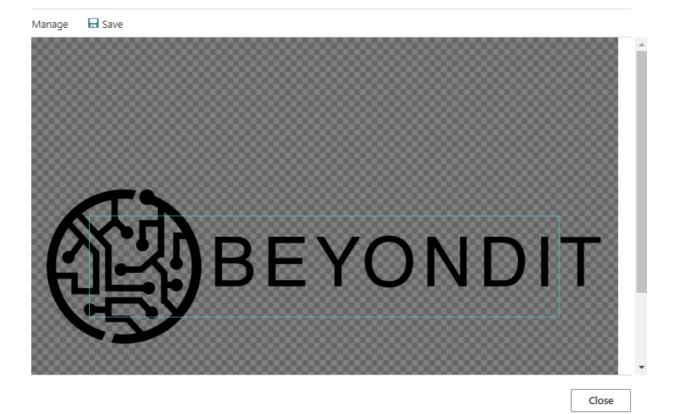
You have set the header picture for the selected report. Note that this change is only applied to the selected report. If you want to change the size and placement of the header picture you can do so using the additional header picture menu options.

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

Beyond Report Setup					
70839255 - Sales - Quote					
🗟 Run Report 💷 Report Placeholders					
General					
Id			70839255	()注例 BEYOI	
Name	BVD Sales - Quote				
Caption	Sales - Quote			BITONDIT GenbH, Molstre Se 12, Seconds, 20097 Ha	amburg
Active as Default				BEYGROFT OWNY Schwerburgersk: 116	Document No. 1021 Document Date 01.02.2 Contorner No. D0004
Pictures				2419 KW Dautobian	Salesperson Dend 8-Mai 858go
⊼ ⊻ 🖉 🛍				Sales - Quote	
				Pos.         No.         Description           1         1000         REVONDET Cuttee Mug	Quantity Unit of Microsoft 1 Stack
BEYONDIT				2 19950 ATHONG Screebled	1 Slok Setal K ex Setal VAT
Header Picture	Footer Picture	Watermark Picture			Total 4 in
Print Settings				Payment Forms 1 Monat246 Rabat Innoh	s. # Tagen
ick the <b>pen</b> icon Ø.					

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

#### Edit - Image Cropper



- 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.

 $\leftarrow$ 

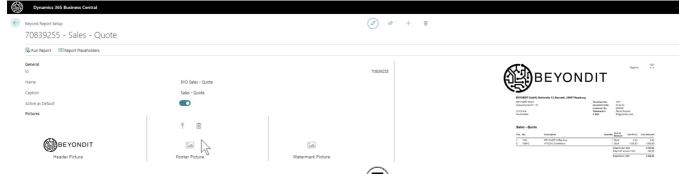
- 2. From the Role Center, open the search (**ALT+Q**)  $\Box$ .
- 3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.

eyond	l Report Setup		√ Saved	
,∕⊃ Se	earch 💽 Analyze	🐯 Edit List	🖉 Edit 💿 View 🔋 Run Report 💷 Report Placeholders \cdots	¢7:
	Report Area ↑		Caption	Active as Default
$\rightarrow$	Purchase	:	Purchase - Quote	~
	Purchase		Purchase - Order	
	Purchase		Purchase - Blanket Order	
	Purchase		Purchase - Return Order	
	Purchase		Purchase - Receipt	
	Purchase		Purchase - Invoice	
	Purchase		Purchase - Credit Memo	
	Purchase		Purchase - Return Shipment	
	Sales		Sales - Quote	
	Sales		Sales - Order	
	Sales		Sales - Shipment	
	Sales		Sales - Invoice	
	Sales		Sales - Credit Memo	
	Sales		Sales - Blanket Order	
	Sales		Sales - Return Order	
	Sales		Sales - Return Receipt	
	Sales		Sales - Pro Forma Invoice	
	Service		Service - Quote	
	Service		Service - Order	
	Service		Service - Item Worksheet	
	Service		Service - Shipment	
	Service		Service - Invoice	
	Service		Service - Credit Memo	
	Service		Service - Warranty Claim	
	Reminder		Issued Reminder	
	Reminder		Reminder	

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

(ii)	Dynamics 365 Business Central					
~	Beyond Report Setup 70839255 - Sales - Quote					
	🗟 Run Report 💷 Report Placeholders					
	General Id Name	BYD Sales - Quote		70839255	BEYON	
	Caption Active as Default	Sales - Quote			EXTORET Genald, Hofstraße 12, Benneth, 20097 Hearth High-Staff Onder Hanaverseneth 15	
	Pictures		Ť.		2110 Kal	Costener No. 20022 Selegenson Extra Costa Fallet Eligounia com
					Sales - Quote	Quantity Unit of Unit Price Line Amount
	BEYONDIT				Fox. No. Description 1 1000 #FritoCiff Calles Kug 2 1006-0 ATHCING Screekisch	1 55404 5.00 5.00 1 55404 1.005.00 1.005.00 Fedal Cent. 1881 5.090.00
	Header Picture	Footer Picture	Watermark Picture			Total 14 Incl. 107. 122,05 Total 4 Incl. 107. 1.202,85

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  $\overline{\mathbf{C}}$
- 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.

Beyond Report Setup		l 12 + 11	Sandooxustomer >> u vv / sank veoe
70839255 - Sales - Quote			- /
🗟 Run Report 🕮 Report Placeholders			
General			Α
Id		70839255	Paperio 111
Name	BYD Sales - Quote		()注) BEYONDIT
Caption	Sales - Quote		
Active as Default			
Pictures			INFORM Carlos 11, E-rosts, 2007 Nandorg      EC/2007 Toucho      EC/2007 Toucho      Forevent Ibs. 101/      Echanomoupent: 114      Channers Ibs. 2019      Channers Ibs
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BEYONDIT	WEWEY New transmission of , in the 1 Mel second model in the large of the 1000 to the large second s		Sales - Quote
Header Picture	Footer Picture	Watermark Picture	Pres. Ris. Detectiption Grantity Measure 1 1000 EEV/criticit Cather May 1150x1 5.00 5.00
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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.

🗟 Run Report 💷 Report Placeholders		
<b>General</b> Id		7083
Name	BYD Sales - Quote	
Caption	Sales - Quote	
Active as Default		
<b>A</b>		
BEYONDIT	Memory and a second sec	
Header Picture	Footer Picture	Watermark Picture
Click the <b>pen</b> icon 🖉.		
The Edit – Image Cropper windo	ow is displayed	

		*
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 Schnoor County Court: Kiel (Germany) Commercial Register: Bank: Account Holder: BEYONDIT GmbH BIC: IBAN:		l
Page 1 of 1 of Invoice #2022-112		
		l
		1
		·
	Close	

- 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.

 $\leftarrow$ 

- 2. From the Role Center, open the search (**ALT+Q**)  $\Box$ .
- 3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.

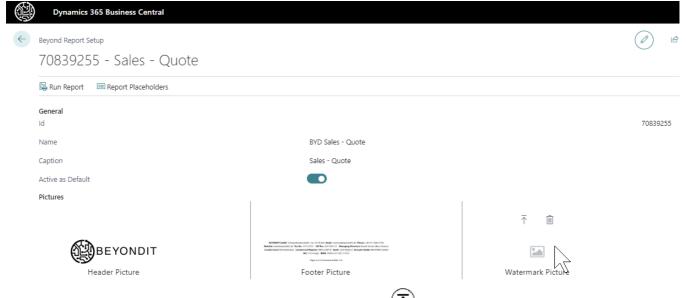
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)⊂ S€	earch Analyze	H# Edit List	Call of View Me	s kun kepon		
	Report Area ↑		Caption			Active as Default
$\rightarrow$	Purchase		Purchase - Quote			
~	Purchase	:	Purchase - Order			
	Purchase		Purchase - Blanket Or	dor		
	Purchase		Purchase - Return Ord			
	Purchase		Purchase - Receipt	261		
	Purchase		Purchase - Invoice			
	Purchase		Purchase - Credit Mer	mo		
	Purchase		Purchase - Return Shi			
	Sales		Sales - Quote			
	Sales		Sales - Order			
	Sales		Sales - Shipment			
	Sales		Sales - Invoice			
	Sales		Sales - Credit Memo			
	Sales		Sales - Blanket Order			
	Sales		Sales - Return Order			
	Sales		Sales - Return Receipt	t		
	Sales		Sales - Pro Forma Invo	oice		
	Service		Service - Quote			
	Service		Service - Order			
	Service		Service - Item Worksh	neet		
	Service		Service - Shipment			
	Service		Service - Invoice			
	Service		Service - Credit Memo	0		
	Service		Service - Warranty Cla	aim		
	Reminder		Issued Reminder			
	Reminder		Reminder			

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

	Dynamics 365 Business Central			SandboxCustomer 🔎 🗘 🐵 7	7 Jannic Weidel
<	Beyond Report Setup		0	7 k² + ®	e x
	70839255 - Sales - Quote				
	🗟 Run Report 🕮 Report Placeholders				
	General				A
	ld Name	BYD Sales - Quote	708		
	Caption	Sales - Quote		() 译的 BEYONDIT	
	Active as Default			EVEN ( Solid Scherchel 12, Events 1807 (Solid org	
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	BEYONDIT	BERRY Statistics de la seconda de la secondación de la seconda de la secondación de	2.6	Sales - Quote	
	Header Picture	Footer Picture	Watermark Picture	Pers. No.         Description         Garantity lifest af bit Prior         Unit Prior         Liter Associat           1         1985         650'0007' Collex Hold         1.50:         5.00         5.00	
				1 1000 E. Cold Control (1) 1000 E. Cold Contro	
	Contraction and the			1000 KA ARRIVETYS 102.05 TODA C MAR XXT 1222.05	
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				Paynent Method Eurolaural	
	10 M				
	Interface inter-	Transformer .		REFERENCE General Schwarthogenotelle 116, 2013 for K-Maile reduning/byweid/55.64 Takelen +49 413 3502020	
	100 C			We determine the interface of the second sec	
				Selfe & von 1. von Rectmung. #2022-112	

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



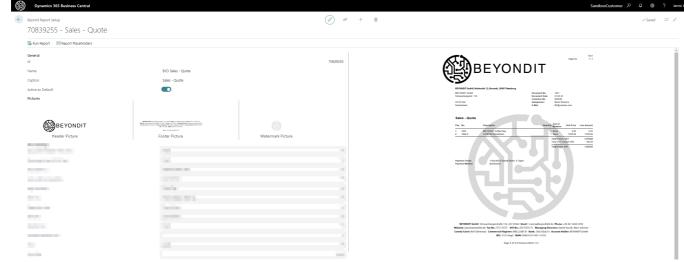
- 7. In the options menu for the watermark picture, click the **Upload** icon  ${f \overline{T}}$
- 8. The file explorer is displayed. Specify the path to the watermark picture and select the appropriate picture. Observe the following given specifications:

**Size**: 800×800 px

File Type: JPEG or PNG file

Features: No colors (greyscale only), transparent background (if you use PNG)

9. Upload the picture file. The uploaded picture is displayed in a reduced size under the **Pictures** section. At the same time, the live preview on the right side of the screen is updated to show the footer picture in the report.



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

### **Available Print Settings**

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

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

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

Beyond	l Report Setup		√ Saved	
∕⊃ Se	earch 💽 Analyze	🐯 Edit List	🖉 Edit 💿 View 🗟 Run Report 💷 Report Placeholders \cdots	¢ 7
	Report Area ↑		Caption	Active as Default
$\rightarrow$	Purchase	:	Purchase - Quote	
	Purchase		Purchase - Order	
	Purchase		Purchase - Blanket Order	
	Purchase		Purchase - Return Order	
	Purchase		Purchase - Receipt	
	Purchase		Purchase - Invoice	
	Purchase		Purchase - Credit Memo	
	Purchase		Purchase - Return Shipment	
	Sales		Sales - Quote	
	Sales		Sales - Order	
	Sales		Sales - Shipment	
	Sales		Sales - Invoice	
	Sales		Sales - Credit Memo	
	Sales		Sales - Blanket Order	
	Sales		Sales - Return Order	
	Sales		Sales - Return Receipt	
	Sales		Sales - Pro Forma Invoice	
	Service		Service - Quote	
	Service		Service - Order	
	Service		Service - Item Worksheet	
	Service		Service - Shipment	
	Service		Service - Invoice	
	Service		Service - Credit Memo	
	Service		Service - Warranty Claim	
	Reminder		Issued Reminder	
	Reminder		Reminder	

- 4. From the list, select the report for which you want to define the print settings. If you want to define uniform print settings for all reports, we recommend using the setup wizard. For more information, see the Setup Wizard chapter.
- 5. The report card is displayed. Under the **Print Settings** area, you can choose between the following settings and your values:
- Document Header HTML Text
- Document Line HTML Text
- Description 2
- Lines without Quantity

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

#### Document Header HTML Text

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

#### **6** 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	Document No.	1021
Schauenburgerstr. 116	Document Date	01.02.22
	Customer No.	D00040
24118 Kiel	Salesperson	Bernd Skopura
Deutschland	E-Mail	BS@contoso.com

	es - Quo s a HTML te:	 ales quote.				
Pos.	No.	Description	Quantity	Unit of Measure	Unit Price	Line Amount
1 2	1000 1896-S	BEYONDIT Coffee Mug ATHENS Schreibtisch		Stück Stück	5,00 1.005,80	5,00 1.005,80
				Total € excl Total VAT A		1.010,80 192,05
				Total € incl.	VAT	1.202,85

#### Document Line HTML Text

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

#### 

#### HTML Texte – Line-Level

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

You can choose between the following values:

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





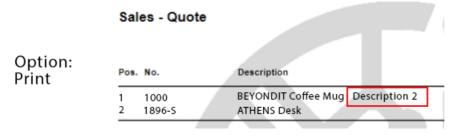
#### Description 2

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.



Print as new Line: If you select this option, the information specified (on the corresponding item card) under the Description2 field will be displayed or printed in the report. Unlike the Print option, the information is printed on a new line.

	Sal	es - Quote	
Option: Print as New Line	Pos.	No.	Description
	1 1000	1000	BEYONDIT Coffee Mug Description 2

Lines Without Quantity

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

You can choose between the following values:

**Don't Print**: If you select this option, no lines with the quantity **0** or no deposited quantity will be displayed or printed in the report.

**Print**: If you select this option, lines with the quantity **0** or no value stored for the **Quantity** field will be displayed or printed in the report.

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

Page Number

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

You can choose between the following values:

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



BEYONDIT GmbH, Hofstraße 12, Benrath, 20097 Hamburg

BEYONDIT GmbH	Document No.	1021
Schauenburgerstr. 116	Document Date	01.02.22

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

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

Page No. 1 / 1
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Page No.

1/1

Item No.

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

You can choose between the following values:

Print: Select this option to specify for the report to print item numbers of your company in the report.

**Print Vendor Item No.**: Select this option to specify for the report that vendor item numbers should be printed in the report instead of your company's item numbers.

Page No. 1 / 1



Pos. No. 1 Fabrikham-01033541	BEYONDIT Coffee Mug	Т	Btück otal excl. V/ otal VAT Am		50,0 <b>50,0</b> 0,0
		10 5	Stück	5,00	50,0
Pos. No.	Description				
Purchase - Quote	Description		Unit of Measure	Unit Cost	Line Amoun
Krystal York Hamburger Str. 18 , GA GA 31772 USA		Document No. Document Date Vendor No.	1001 01.02.22 10000		

#### 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
-	1000 1896-S	BEYONDIT Coffee Mug ATHENS Schreiblisch	1	Stück Stück	5,00 1.005,80	5,00 1.005,80
				Total € exc Total VAT A	I. VAT mount 19%	1.010,80 192,05
-	ent Terms ent Method	1 Monat/2% Rabatt innerh. 8 Tag Banktransit	en			
		Signature Employee	Sign	nature Cus	tomer	

**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.

<b>BEYONDIT GmbH</b> , Hof	straße 12, Benrath,	20097 Hamburg
----------------------------	---------------------	---------------

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

#### 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, Ber	nrath, 20097 Hamburg, Deutschland	
Payment Terms	Laufender Monat		
Payment Method	Banktransit		
	Signature Vendor		

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

Document No.

Document Date

Vendor No.

1001

10000

01.02.22

#### 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 Total VAT Amo	
Ship-to Address Payment Terms Payment Method	CRONUS DE, Hofstraße 12, Be Laufender Monat Banktransit	Total incl. VAT nrath, 20097 Hamburg, Deutschland	50,00
	Signature Employee		

#### Barcode

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

You can choose between the following values:

Don't Print: Select this option to specify that no barcode should be printed in the report.

**Print**: Select this option to print a barcode in the report. The barcode will be printed between the set header picture and the document lines.



#### BEYONDIT GmbH, Hofstraße 12, Benrath, 20097 Hamburg **BEYONDIT GmbH** Document No. 1021 Schauenburgerstr. 116 **Document Date** 01.02.22 D00040 Customer No. 24118 Kiel Salesperson Bernd Skopura Deutschland E-Mail BS@contoso.com Sales - Quote Quantity Unit of Measure Pos. No. Description Unit Price Line Amount

Position No.

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

You can choose between the following values:

Don't Print: Select this option to specify that no position numbers should be printed in the report.

#### BEYONDIT GmbH, Hofstraße 12, Benrath, 20097 Hamburg

Fabrikam, Inc.	Document No.	1001
Krystal York	Document Date	01.02.22
Hamburger Str. 18	Vendor No.	10000
, GA GA 31772		
USA		

#### Purchase - Quote

No.	Description	Quantity	Unit of Measure	Unit Cost	Line Amount
1000	BEYONDIT Coffee Mug	10	Stück	5,00	50,00
			Total excl. \	AT	50,00
			Total VAT A	mount 0%	0,00
			Total incl. V	AT	50,00
Ship-to Address	CRONUS DE, Hofstraße 12, Be	nrath, 20097 Hamburg, Deutschla	and		
Payment Terms	Laufender Monat				
Payment Method	Banktransit				

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

Unit of

Measure

Unit Cost

5.00

Line Amount

50.00

50,00 0.00

#### Purchase - Quote Pos. No. Description Quantity 1 1000 **BEYONDIT Coffee Mug** 10 Stück Total excl. VAT

	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	

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.

#### 

#### **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.

#### **A WARNING**

#### **Changes to the Font Size**

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

### **Use BEYOND Reports**

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

To do this, proceed as follows:

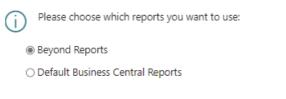
- 1. Open your Business Central.
- 2. From the Role Center, open the search (**ALT+Q**) **D**.
- 3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.



Beyon	d Report Setup		√ Saved		ľ	2
,∕⊃ s	earch 💽 Analyze	🐯 Edit List	🖉 Edit 💿 View 🗟 Run Report 💷 Report Placeholders \cdots	67	7	
	Report Area ↑		Caption	Active as Default		
$\rightarrow$	Purchase	÷ .	Purchase - Quote	~		
	Purchase		Purchase - Order			
	Purchase		Purchase - Blanket Order			
	Purchase		Purchase - Return Order			
	Purchase		Purchase - Receipt			
	Purchase		Purchase - Invoice			
	Purchase		Purchase - Credit Memo			
	Purchase		Purchase - Return Shipment			
	Sales		Sales - Quote			
	Sales		Sales - Order			
	Sales		Sales - Shipment			
	Sales		Sales - Invoice			
	Sales		Sales - Credit Memo			
	Sales		Sales - Blanket Order			
	Sales		Sales - Return Order			
	Sales		Sales - Return Receipt			
	Sales		Sales - Pro Forma Invoice			
	Service		Service - Quote			
	Service		Service - Order			
	Service		Service - Item Worksheet			
	Service		Service - Shipment			
	Service		Service - Invoice			
	Service		Service - Credit Memo			
	Service		Service - Warranty Claim			
	Reminder		Issued Reminder			
	Reminder		Reminder			

#### 4. Click Setup Report Selections from the menu bar.

5. A dialog box is displayed asking you which reports you want to use:





- 6. Select the **Beyond Reports** option and click **OK**.
  - >[!NOTE]

#### >Use Default Reports

You can switch back to the standard Business Central reports at any time. To do this, proceed as described above and confirm the dialog box with the **Default Business Central Reports** option selected.

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

the default report from Business Central will be used.

Next Chapter

### Use Placeholders

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

5				Page No.	1/
<b>沿)</b> BE`	YONDIT				
<b>y</b>					
BEONDIT GmbH, Ho	ofetraße 12, Benrath, 20097 Hamburg				
BEYONDIT GmbH Schauenburgerstr. 11	16	Document No. Document Date Customer No.	1021 01.02.22 D00040		
24118 Kiel		Saleeperson	Bernd Skopura	a	
Quote 1021		E-Mail	BS@cantaso.	com	
	your inquiry (Reference: EB-2022-	0001541) and submit the	following quo	te.	
Quote 1021 Thank you for yo We've received		0001541) and submit the	following quo	te.	
Quote 1021 Thank you for yo We've received	your inquiry (Reference: EB-2022-	0001541) and submit the	following quo is quote.	te.	Line Amour
Quote 1021 Thank you for yu We've received Please quote the	your inquiry (Reference: <u>EB-2022</u> , e quotation number ( <u>1021</u> ) if you h Description BEYONDIT Caffee Mup	0001541) and submit the ave any queries about thi Quantity	following quo is quote.	te.	
Quote 1021 Thank you for yu We've received Please quote the Pos. No.	your inquiry (Reference: EB-2022- e quotation number ( <u>1021</u> ) if you h Description	0001541) and submit the ave any queries about thi Quantity	following quo is quote.	ote. Init Price	Line Amour 5.0 1.005,8
Quote 1021 Thank you for yw We've received Please quote the Pos. No.	your inquiry (Reference: <u>EB-2022</u> , e quotation number ( <u>1021</u> ) if you h Description BEYONDIT Caffee Mup	0001541) and submit the ave any queries about thi Quantity	following quo is quote.	ote. 5.00 1.005.80	5,0

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**) **D**.
- 3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.



,∕⊃ Se	earch 💽 Analyze	🐯 Edit List	🖉 Edit 💿 View 🗟 Run Report 💷 Report Placeholders \cdots	☞ 7 ≡
	Report Area ↑		Caption	Active as Default
$\rightarrow$	Purchase	÷ .	Purchase - Quote	✓
	Purchase		Purchase - Order	
	Purchase		Purchase - Blanket Order	
	Purchase		Purchase - Return Order	
	Purchase		Purchase - Receipt	
	Purchase		Purchase - Invoice	
	Purchase		Purchase - Credit Memo	
	Purchase		Purchase - Return Shipment	
	Sales		Sales - Quote	
	Sales		Sales - Order	
	Sales		Sales - Shipment	
	Sales		Sales - Invoice	
	Sales		Sales - Credit Memo	
	Sales		Sales - Blanket Order	
	Sales		Sales - Return Order	
	Sales		Sales - Return Receipt	
	Sales		Sales - Pro Forma Invoice	
	Service		Service - Quote	
	Service		Service - Order	
	Service		Service - Item Worksheet	
	Service		Service - Shipment	
	Service		Service - Invoice	
	Service		Service - Credit Memo	
	Service		Service - Warranty Claim	
	Reminder		Issued Reminder	
	Reminder		Reminder	

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

	No. †	Field Name	Field Caption	
$\rightarrow$	<u>11</u>	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	
				OK Cancel

- 11. Select the field (field value) to be referenced for the defined placeholder (**%1**) from the list. Use the search function  $\Box$  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	2	$\times$
Manage		È

	Placeholder †		Field No.	Field Caption
	%1		11	Your Reference
	%2		3	No.
	%3		5	Bill-to Name
$\rightarrow$	<documentno></documentno>	:	3	No.

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.

BEYONDIT		Page No. 1 / 1	BEYONDI	Page No. 1/1
BEONDIT GmbH, Hofstraße 12, Benrath, 20097 Hamburg BEYYONDIT GmbH Schauenburgenstr. 116 24118 Kiel Deutschland		2.22	BEONDIT GmbH, Hofstraße 12, Benrath, 20097 BEYONDIT GmbH Schauerbargersiz. 116 24118 Kiel Deutschland	Document No.         1001           Document Date         01.02.22           Customer No.         00040           Salesperison         Bend Skepura           E-Mail         BS@contoso.com
Sales - Quote	Quantity Unit of	re Unit Price Line Amount	Quote 1021	Guantity Messure Unit Price Line Amount
1 1000 BEVONDIT Callee Mug 2 1896-S ATHENS Schreibisch	1 Stück 1 Stück	5.00 5.00 1.005.80 1.005.80 excl. VAT 1.010.80	1 1000 BEYONDIT Calfee N 2 1896-S ATHENS Schreiblisc	fug 1 Stück 5,00 5,00

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

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

1. Open your Business Central.

 $\leftarrow$ 

- 2. From the Role Center, open the search (**ALT+Q**)  $\Box$ .
- 3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.

⊖ Se	earch 💽 Analyze	🐯 Edit List	🖉 Edit 🔿 View 🔋 Run Report 💷 Report Placeholders	¢ 7	
	Report Area ↑		Caption	Active as Default	
$\rightarrow$	Purchase	:	Purchase - Quote		
	Purchase		Purchase - Order		
	Purchase		Purchase - Blanket Order		
	Purchase		Purchase - Return Order		
	Purchase		Purchase - Receipt		
	Purchase		Purchase - Invoice		
	Purchase		Purchase - Credit Memo		
	Purchase		Purchase - Return Shipment		
	Sales		Sales - Quote		
	Sales		Sales - Order		
	Sales		Sales - Shipment		
	Sales		Sales - Invoice		
	Sales		Sales - Credit Memo		
	Sales		Sales - Blanket Order		
	Sales		Sales - Return Order		
	Sales		Sales - Return Receipt		
	Sales		Sales - Pro Forma Invoice		
	Service		Service - Quote		
	Service		Service - Order		
	Service		Service - Item Worksheet		
	Service		Service - Shipment		
	Service		Service - Invoice		
	Service		Service - Credit Memo		
	Service		Service - Warranty Claim		
	Reminder		Issued Reminder		

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

Custom Repo	rt Captions Manage		4	er en
	Field 1	New Language Code †	New Caption	
$\rightarrow$	Report Title	ENU	Quote %2	

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

#### **O** 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.

 $\leftarrow$ 

- 2. From the Role Center, open the search (ALT+Q) D.
- 3. Search for the Beyond Reports Setup page and click on the corresponding search result.

leyond	d Report Setup				√ Save	d 🗌 🗹	Ľ		
∕⊃ Se	earch 💽 Analyze	🐯 Edit List	🖉 Edit 🛛 💿 View	📮 Run Report	E Report Placeholders	· & 7			
	Report Area ↑		Caption			Active as Default			
$\rightarrow$	Purchase	:	Purchase - Quote	2		Image: A start and a start			
	Purchase		Purchase - Order						
	Purchase		Purchase - Blank	et Order					
	Purchase		Purchase - Retur	n Order					
	Purchase		Purchase - Recei	pt					
	Purchase		Purchase - Invoid	e					
	Purchase		Purchase - Credit	t Memo					
	Purchase		Purchase - Retur	Purchase - Return Shipment					
	Sales		Sales - Quote						
	Sales		Sales - Order						
	Sales		Sales - Shipment						
	Sales	Sales - Invoice							
	Sales		Sales - Credit Me						
	Sales		Sales - Blanket O						
	Sales		Sales - Return Or						
	Sales		Sales - Return Re						
	Sales		Sales - Pro Form						
	Service		Service - Quote	Service - Quote					
	Service		Service - Order	Service - Order					
	Service		Service - Item W	orksheet					
	Service		Service - Shipme	Service - Shipment					
	Service		Service - Invoice	Service - Invoice					
	Service		Service - Credit M	Service - Credit Memo					
	Service		Service - Warran	ty Claim					
	Reminder		Issued Reminder						
	Reminder		Reminder						

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 Placemen	t Manage		e 2
Top Left			~
	Field		Font Size
$\rightarrow$	Address	÷	8,00
	Report Title		12,00

- **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.

<b>TL</b>				Page No.	
黛)BE	YONDIT				
	traße 12, Benrath, 20097 Hamburg	2			
Fabrikam, Inc. Krystal York Hamburger Str. 18 , GA GA 31772 USA	uase 12, Sentaul, 20097 Nahiburg	Document No. Document Dat Vendor No.			
Purchase - Quo	Description BEYONDIT Coffee Mug	Qu	antity Unit of Measure	Unit Cost	Line A
1 1000	BETONDIT Collee mog		Total excl. V		
			Total VAT Ar	mount 0%	
			Total incl. V	AT	
hip-to Address Payment Terms Payment Method	CRONUS DE, Hofstraße 12, I Laufender Monat Banktransit	Benrath, 20097 Hamburg, De	utschland		
_					
	Signature Employee				

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**)  $\Box$ .
- 3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.



	Report Area ↑		Caption	Active as Default
<i>&gt;</i>	Purchase	÷	Purchase - Quote	
	Purchase		Purchase - Order	
	Purchase		Purchase - Blanket Order	
	Purchase		Purchase - Return Order	
	Purchase		Purchase - Receipt	
	Purchase		Purchase - Invoice	
	Purchase		Purchase - Credit Memo	
	Purchase		Purchase - Return Shipment	
	Sales		Sales - Quote	
	Sales		Sales - Order	
	Sales		Sales - Shipment	
	Sales		Sales - Invoice	
	Sales		Sales - Credit Memo	
	Sales		Sales - Blanket Order	
	Sales		Sales - Return Order	
	Sales		Sales - Return Receipt	
	Sales		Sales - Pro Forma Invoice	
	Service		Service - Quote	
	Service		Service - Order	
	Service		Service - Item Worksheet	
	Service		Service - Shipment	
	Service		Service - Invoice	
	Service		Service - Credit Memo	
	Service		Service - Warranty Claim	
	Reminder		Issued Reminder	
	Reminder		Reminder	

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

#### **O** 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.

#### **6** 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	Repo	rt Captions Manage			ê E
		Field 1	New Language Code †	New Caption	
	÷	Salesperson / Purchaser	ENU	Employee	

1/1

You have edited the field caption.

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



Next Chapter

## Add Text to Document

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

#### **O** NOTE

#### **Set Print Settings**

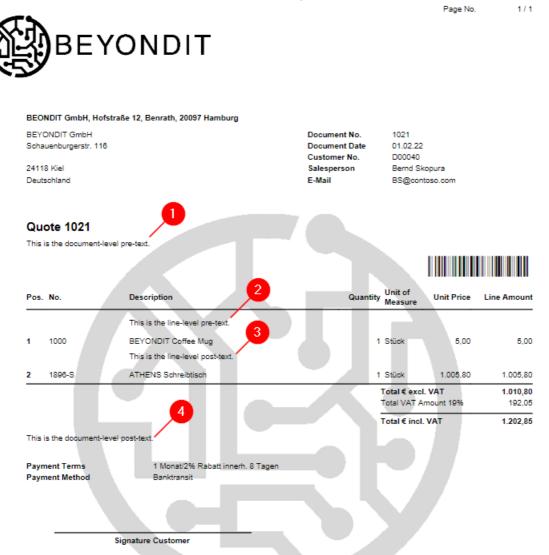
The available settings for printing the texts can be found under the associated report card under **BEYOND Reports Setup**. For more information about the print settings, see the Document Header HTML Text and Document Line HTML Text sections.

#### **O** 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)** <u>no</u> 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.



### **Create Document-Level Pre-Text**

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

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

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

- 1. Open your Business Central.
- 2. From the Role Center, open the search (**ALT+Q**)  $\Box$ .
- 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.

anage	× D	elete	R	Get HTN	1L Text	Temp	late	III P	Report	Place	nolder	rs							
Pre-Text	~	5	Ç	H1 🗸	Å	В	Ι	Ū	ab		≣	≣	≣	I	≣	Θ			
																	~		
																	Chars	:0 Line	2S:

- 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
ッ	This option allows you to <b>undo</b> changes to the formatting of the entered text.
۲.	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.
\$2	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.
В	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.
Ι	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	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.
ы	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.
Ξ	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.
Ξ	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.
Ξ	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.
三	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.
Θ	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.gde, .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.

#### Edit - HTML Editor

Manage	×D	elete	R	Get HTN	/IL Text	Templa	ate	⊞ F	leport	Place	holdei	rs							
Pre-Tex	t 🗸	5	Ç	H1 🗸	Å	В	Ι	U	ab		≣	Ξ	≣	1	Θ				
Thank y We are		-		-	i the q	uote	%2.												*
																			Ŧ
																Cha	rs: 0	Lines:	0
																		Close	

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

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

### **Create Document-Level Post-Text**

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

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

- 1. Open your Business Central.
- 2. From the Role Center, open the search (**ALT+Q**)  $\Box$ .
- 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	× D	elete	R	Get HTN	1L Text	Templ	ate	💷 R	leport	Place	holde	rs							
Pre-Tex	t 🗸	5	Ç	H1 🗸	Å	В	Ι	U	ab		≣	≣	≣	E	Θ				
																			*
																Cha	irs: 0	Lines	: 0
																		Close	•

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

Button	Description
ッ	This option allows you to <b>undo</b> changes to the formatting of the entered text.
୯	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.
В	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.
Ι	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	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.
ab	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.
E	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.
Ξ	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.
Ξ	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.
8	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.
Θ	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.gde, .com, etc.).
	This button is used to <b>save</b> any changes to the text.

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

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

### **Create Line-Level Pre-Text**

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

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

- 1. Open your Business Central.
- 2. From the Role Center, open the search  $(ALT+Q) \square$ .
- 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.

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- 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.

ullet: 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.

EEE: 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.

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

Button	Description
ッ	This option allows you to <b>undo</b> changes to the formatting of the entered text.
٢	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.
В	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.
Ι	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	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.
əb	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.
E	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.
Ξ	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.
Ξ	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.
łΞ	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.
III	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.
Θ	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.gde, .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)**.

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  $(ALT+Q) \square$ .
- 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.

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- 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.

ullet: 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.

EEE: 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	× D	elete	R	Get HTN	1L Text	Templ	ate	💷 R	eport	Place	holde	rs							
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																		Close	

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

Button	Description
ッ	This option allows you to <b>undo</b> changes to the formatting of the entered text.
٢	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.
В	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.
Ι	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	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.
əb	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.
E	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.
Ξ	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.
Ξ	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.
łΞ	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.
III	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.
Θ	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.gde, .com, etc.).
	This button is used to <b>save</b> any changes to the text.
	-

- 10. To save your text click the **Save** icon  $\square$  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**)  $\Box$ .
- 3. Search for HTML Text Templates and click on the corresponding search result.
- 4. The HTML Text Templates page is displayed.

HTML Text Tem	plates						2
	+ New Man	age 💷 Repor	t Placeholders	1 Move Up	\rm Move Down	r B	=
Area 1	Туре	No.	Text No.	Sorting No. † D	escription	Language Code	Valic

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



# HTML Text Template Purchase 0

Report Placeholders

General		
Area ····· Purchase	✓ Text No.	0
Туре	✓ Sorting No. · · · · · · · ·	0
No	Description	
Parameters		
Language Code	Valid to · · · · · · · · ·	Ē
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Document Settings		
Quote ·····	Credit Memo	
Order ·····	Blanket Order	
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		*

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:
Area	<ul><li>Purchase: The text template is used for purchase documents.</li><li>Sales: The text template is used for sales documents.</li><li>Service: The text template is used for service documents.</li></ul>
Туре	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.
No.	Enter the corresponding vendor, customer or item number in this input field (if you have further limited the use of the HTML text template under the <b>General</b> area in the Type field).
Text No.	In this field you enter the ID number for the text.
Sorting No.	In this field you specify the sorting number for the sequence in case of multiple texts/HTML text templates. Here, the value <b>1</b> corresponds to the first position in the sequence.
Description	In this field you enter a description for the HTML text template.
efine the other p	arameters for the usage of the HTML text template:

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

9. Use the sliders under the **Document settings** area to define for which document types the HTML text template should be used.

10. Under the **HTML Editor** area you can define a pre-text as well as a post-text for the HTML text template.

Ø

# HTML Text Template Sales Customer 10000 1 Sales

General					
Area · · · · · · · · · · · · · · · · · · ·	Sales	~	Text No.		
Туре	Customer	~	Sorting No.		1
No	10000	$\sim$	Description	Sales	
Parameters					
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Valid from	15.12.2022		Deactivate Default Te		
			Automatic Insert		
Document Settings					
Quote · · · · · · · · · · · · · · · · · · ·			Credit Memo		
Order			Blanket Order		
			Return Order		
Invoice			Return Order	_	
	Delete				
HTML Editor 🛛 🗙		<u>U</u> ;			

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

P       This option allows you to undo changes to the formatting of the entered text.         C       This option allows you to repeat changes to the formatting of the entered text after previously undoing them.         H       This option allows you to format a headline in the text. You have 6 predefined heading levels to choose from.         Image:       This option allows you delete a formatting for a text. Select the text for which you want to delete the formatting and click on this button.         Image:       With this option you can format text in bold. Select the text for which you want to use bold formatting and click on this button.         Image:       With this option you can format text in italic. Select the text for which you want to use italic formatting and click on this button.         Image:       With this option you can underline text. Select the text for which you want to use italic formatting and click on this button.         Image:       With this option you can color text. Select the text which you want to use underlined formatting and click on this button.         Image:       With this option you can color text. Select the text which you want to color, click on this iccon and choose a color.         Image:       With this option you can color text. Select the text which you want to center-justify and click on this button.         Image:       With this option you can center-justify text. Select the text which you want to center-justify and click on this button.         Image:       With this option you can center-justify text. Select the text which you want to reget-ju	Button	Description
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möchten und klicken Sie auf diese Schaltfläche. Note that you can only format text as a link if it begins with http://, https://, or www. and ends with a top-level domain (e.gde, .com, etc.).	8	
This button is used to <b>save</b> any changes to the text.	Θ	möchten und klicken Sie auf diese Schaltfläche. Note that you can only format text as a link if it begins with
		This button is used to <b>save</b> any changes to the text.

13. To save your text click the **Save** icon  $\square$  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**)  $\Box$ .
- 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.

Edit – Text Designer		,* ×
Manage 🖶 Save		
Pre-Text Sales Greeting	Sales Greeting	8 / 8
Extended Trail Peroid (Sales Campaign Discount "Christmas …)	Dear Mr. Gorski, Thank you for the order O-2023-00015229 dated 01/12/2023.	
Note "Long Delivery Time"	Extended Trail Period	8/8
	In the pre-Christmas period we offer all costomers an extended trial period. For you, this means that you can test our products free of charge until the new year instead of 2 weeks. We would be pleased if you would give us feedback on our products, just write us an email to helve@beyondi.gmbh.	
	Sales Campaign Discount "Christmas Time"	8/8
	For the products you select, we offer a special 5% discount as part of our "Drivitinus & Writer 2023" sales campaign.	
	Line No. Type No. Description Description 2 Quantity Unit	
	Nos	
	Plase see the note before requiring the term:	
		]
Post-Text	1000 thm 1001 BPOND Cloud Connector License and/imited 1 Piece	
( Help and Support )	No Exchange for Software Licenses	⊡ ⁄ ≋
(Farewell Christmas 2023	The item you have solected is a software license. Please note that software licenses cannot be returned or exchanged by us,	
	Flelp and Support	8/8
	Types med help or support, plane for the tot call or main at a HoloDeprovid tapato. <sup>1</sup> You can reach us by phone from 00.00 - 17.00 (newskdays) at +40.413 X03 3700. In addition, you can online documentation participation at http://documentation.international.com/documentation.international	
	Farweit Christma 2023	⊡ / 8
	We thank you for your houts and wish you a Meny Christmaa and a Happy New Year.	]
		Close

- 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.

#### **O** 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.

#### 

#### 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) D.
- 3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.



Saved	Ľ	2

	Durah ana		Caption	Default
	Purchase	:	Purchase - Quote	~
	Purchase		Purchase - Order	
	Purchase		Purchase - Blanket Order	
	Purchase		Purchase - Return Order	
	Purchase		Purchase - Receipt	
	Purchase		Purchase - Invoice	
	Purchase		Purchase - Credit Memo	
	Purchase		Purchase - Return Shipment	
:	Sales		Sales - Quote	
:	Sales		Sales - Order	
:	Sales		Sales - Shipment	
:	Sales		Sales - Invoice	
:	Sales		Sales - Credit Memo	
:	Sales		Sales - Blanket Order	
:	Sales		Sales - Return Order	
:	Sales		Sales - Return Receipt	
:	Sales		Sales - Pro Forma Invoice	
:	Service		Service - Quote	
:	Service		Service - Order	
:	Service		Service - Item Worksheet	
:	Service		Service - Shipment	
:	Service		Service - Invoice	
:	Service		Service - Credit Memo	
:	Service		Service - Warranty Claim	
	Reminder		Issued Reminder	

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

#### **O** 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.

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- 2. From the Role Center, open the search (**ALT+Q**) **D**.
- 3. Search for the **Beyond Reports Setup** page and click on the corresponding search result.

-	d Report Setup		√ Saved	<b>•</b>
,∕⊃ Se	earch 💽 Analyze	🐯 Edit List	🖉 Edit 💿 View 🗟 Run Report 💷 Report Placeholders \cdots	¢ 7
	Report Area ↑		Caption	Active as Default
$\rightarrow$	Purchase	:	Purchase - Quote	<b>v</b>
	Purchase		Purchase - Order	
	Purchase		Purchase - Blanket Order	
	Purchase		Purchase - Return Order	
	Purchase		Purchase - Receipt	
	Purchase		Purchase - Invoice	
	Purchase		Purchase - Credit Memo	
	Purchase		Purchase - Return Shipment	
	Sales		Sales - Quote	
	Sales		Sales - Order	
	Sales		Sales - Shipment	
	Sales		Sales - Invoice	
	Sales		Sales - Credit Memo	
	Sales		Sales - Blanket Order	
	Sales		Sales - Return Order	
	Sales		Sales - Return Receipt	
	Sales		Sales - Pro Forma Invoice	
	Service		Service - Quote	
	Service		Service - Order	
	Service		Service - Item Worksheet	
	Service		Service - Shipment	
	Service		Service - Invoice	
	Service		Service - Credit Memo	
	Service		Service - Warranty Claim	
	Reminder		Issued Reminder	
	Reminder		Reminder	

4. To place a free text in a report template, click the value under the **Report Area** column in the list that is displayed. For the description below, we have selected the **Sales - Quote** report card.

New Caption Freetext

5. The report card is displayed.

Custom Report Captions Ma Field ↑ → Free Text

- 6. Scroll down to the Field Placement tab.
- 7. From the dropdown menu, select the area where you want to add the free text:

• **Top Left** (1): Select this area to place the free text at the top left.

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- 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.



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We've received your inc any queries about this o	reac quiry (Reference No.: ) and are happy to sub offer.	omit the following offer. Please qu	ote the quotation num	ber ( <u>%3</u> ) if you l
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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).

#### 

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

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



BEONDIT GmbH, Hofstraße 12, Benrath, 20097 Hamburg		
BEYONDIT GmbH Schauenburgerstr. 116	Document No. Document Date	1021 01.02.22
24118 Kiel Deutschland	Customer No. Salesperson E-Mall	D00040 Bernd Skopura BS@contoso.com
Quote 1021	7	
Heading 1		
Heading 2		λ
Heading 3		
Heading 4		
Heading 5		
Heading 6		

### **Line Break**

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

#### 

#### **Use of Line Breaks**

For a line break, it is not necessary to define a start and end point for the formatting because they did not differ. Therefore, you do not need to add a "closing" tag.

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

### Color

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

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

Color Formatting with Words Color Formatting with Hex Values

#### Color Formatting with Words

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

Color	HTML Tags	Description
Red	<font color="red"></font>	Example: <font color="red">Red</font>
Blue	<font color="blue"></font>	Example: <font color="blue">Blue</font>
Green	<font color="green"></font>	Example: <font color="green">Green</font>
Yellow	<font color="yellow"></font>	Example: <font color="yellow">Yellow</font>
Orange	<font color="orange"></font>	Example: <font color="orange">Orange</font>

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

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

#### Color Formatting with Hex Values

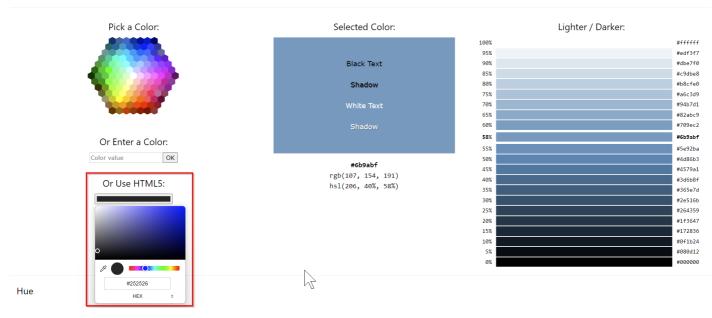
Hexadecimal color formatting offers you a wide color palette for color formatting your texts or field captions. With hexadecimal colors you can select countless color gradations (for example all red levels between white/light red and dark red/black) for formatting. Below you will find an example of how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

Color	HTML Tags Description	
Red	<font color="#FF0000"></font>	Example: <font color="FF0000">Red</font>
Blue	<font color="0000FF"></font>	Example: <font color="0000FF">Blue</font>
Green	<font color="00FF00"></font>	Example: <font color="00FF00">Green</font>
Yellow	<font color="FFF00"></font>	Example: <font color="FFFF00">Yellow</font>
Orange	<font color="#FFA500"></font>	Example: <font color="#FFA500">Orange</font>

The website w3schools offers a hexadecimal color picker/generator. You can determine the exact color there via the tool  $\mathscr{P}$ .

### HTML Color Picker

### **〈** Previous



## Bold

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

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

### Italic

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

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

## Underlined

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

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

Next >