

BEYOND ADDITIONALINFORMATION

User Guide



BEYONDIT GmbH

Schauenburgerstr. 116 24118 Kiel Germany + 49 431 3630 3700 hello@beyondit.gmbh

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Preface

This documentation contains information on how to install and operate **Beyond AdditionalInformation** in your Business Central environment.

This documentation is intended for experienced users of Business Central. Additional knowledge of third-party software products may be required to set up **Beyond AdditionalInformation**.

Read this documentation in full to set up **Beyond AdditionalInformation** and work with it professionally. Pay particular attention to the tips, information and safety instructions contained in the documentation. Inform your employees about the proper use of Beyond Additional Information and keep the documentation in a place that is accessible to your employees.



Manufacturer

Beyond AdditionalInformation is developed by:

BEYONDIT GmbH

Schauenburgerstraße 116 24118 Kiel Germany info@beyondit.gmbh +49 431 3630 3700



Version history

Version	Date	Author	Comments
1.0	15.03.2023	Jannic Weidel	First version of the documentation
1.1	10.05.2023	Jannic Weidel	Chapter on the assignment of permission sets added
1.2	14.11.2024	Jannic Weidel	Added description for note texts on customer and vendor
1.3	12.05.2025	Jannic Weidel	Revisions and new content
1.4	13.06.2025	Jannic Weidel	Added preface chapter

Document access

public

General Information

This documentation contains important information that you must observe when following the descriptions. The information is highlighted as notes and arranged according to type and importance. The notes are listed below in ascending order of importance:

O TIP

This represents **no risk**. In addition to the classic clicking on options, Business Central also offers the option of using so-called shortcuts. Shortcuts are key combinations with which you can also execute the desired action in the user interface. By using shortcuts, you can work faster and more effectively. Try the key combination and you will be surprised how much faster you can work.

O NOTE

This represents **no risk**. This note contains important information on the correct use, configuration or operation of the software. Follow these instructions to avoid inefficiencies and unnecessary support tickets. For example, this note can show you that an option is hidden and tells you how to proceed if you want to show it again.

ம் IMPORTANT

This represents a **low risk**. This notice refers to non-critical issues that may lead to undesired behavior or configuration problems. May affect user experience or functionality if not considered.

A CAUTION

This represents a **medium risk**. This notice indicates a potential problem that could affect system stability or data integrity. Failure to comply may result in errors, loss of performance or partial service interruptions. The errors caused by non-compliance only affect the app itself and prevent you from working with data within the app.

A WARNING

This represents a **high risk**. This notice indicates an immediate and serious risk to the productive system. Failure to observe this warning may affect the entire system. There is a risk of loss of critical data or total system failure, leading to prolonged downtime. It may not be possible to restore the data and a backup must be imported. Beyond AdditionalInformation is an extension for Microsoft Dynamics 365 Business Central.

With **Beyond AdditionalInformation** you can store information texts for items, service items as well as for customers and vendors in Business Central.

There are numerous options available to you for designing the information texts. For each message text, you can set in which business areas (purchase, sales, service or all business areas) it should be displayed.

If a note text is available for an item or service item, this is displayed accordingly in the document lines.

Supported Documents

The following documents are supported:

Sales	Purchase	Service
Sales Quote	Purchase Quote	Service Quote
Sales Order	Purchase Order	Service Order
Sales Invoice	Purchase Invoice	Service Invoice
Sales Credit Memo	Purchase Credit Memo	Service Credit Memo
Blanket Sales Order	Blanket Purchase Order	Service Shipment
Purchase Return Order	Sales Return Order	Service Item Worksheet

On the above-mentioned documents, you also have the option of viewing additional information for the customer or the vendor in the document header.

The examples described in this documentation represent only some of the possibilities offered by the **Beyond** AdditionalInformation solution. If you have a specific case that you would like to map using the solution, please do not hesitate to contact us.

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

O NOTE

Dependencies on or to other apps

Additional, basic applications are required to use **Beyond AdditionalInformation**. The following applications are required to use **Beyond AdditionalInformation**:

• Beyond License: Management of trial and full licenses for apps of BeyondIT.

License Management

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

To view the status of the product license for **Beyond AdditionalInformation**, 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.

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Beyond Lizenz-Management							
Marraichnic. ID							
Verzeichens-hD							
Verzeichnis-Domain							
Lizenzen Synchronisiert Lizenz							r 🗹
Unternehmensname f	Anwendungsname	Status	Startdatum	Ablaufdatum	Test	Uzenzierte Metrik	Aktuelle Metrik
\rightarrow	BeyondCalculation	Valid	23.08.2024 08:50	22.09.2030 08:50		1	0
	BeyondServiceRequisition	Valid	02.04.2024 09:13	02.05.2030 09:13		1	0
	BeyondPostCalculation	Valid	14.08.2024 00:33	13.09.2030 00:33		1	0
	BeyondReportPreview	Valid	15.07.2024 21:26	14.08.2030 21:26		1	0
	BeyondService	Valid	30.01.2024 07:41	28.02.2030 07:41		7	0
	BeyondCues	Valid	29.11.2023 19:15	28.02.2030 07:41		7	0
	Beyond inventory Details	Valid	29.01.2024 23:28	28.02.2030 07:41		7	0
	BeyondDataImporter	Valid	17.06.2024 22:55	17.07.2030 22:55		1	0
	BeyondCloudConnector	Valid	04.07.2024 06:42	03.08.2030 06:42		1	0
	BeyondAttributesCore	Valid	14.05.2024 07:51	14.07.2030 07:51		1	0
	BeyondReports	Valid	05.07.2024 06:39	04.08.2030 06:39		1	0
	BeyondDocumentLineTransfer	Valid	18.09.2024 20:40	31.12.2099 00:00		4	0

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

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

Assign User Permissions

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

User Permission	Description
BYD AI USER	 Create and edit texts Show texts on cards and pages Mark texts as completed
BYD AI READER	Show texts on cards and pages

To assign the user permission for BEYOND AdditionalInformation 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.

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- 4. Select one of the above permission sets from the list.
- 5. Click **Related** > **Permissions** > **Permission Set by User** in the menu bar.

	Fermination Set by Gale								
	General Company Name · · · · ·		CRONUS E	νE		Show Domain Name			
	Home Browse More options								
	Permissions	Copy Perm	ission Set						
Filter	rs	×		Permission Set 1		Name	Extension Name 🝸	All Users	ADMIN
Filter	list by:			BYD AI READER		BeyondAdditionalInformation Re	BeyondAdditionalInformation		0
× Exte	nsion Name		\rightarrow	BYD ALUSER		BeyondAdditionalInformation Ad	BeyondAdditionalInformation	0	
Beyo	ndAdditionalInformation								
+ 1	Hilter								

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

Add Additional Information to Items

Add Additional Information to Vendor

This section describes how to enter an additional information for a vendor.

Proceed as follows to store an additional information on the vendor:

- 1. Open the search function from the role center (**ALT+Q**).
- 2. Search for Vendors and click on the corresponding search result.
- 3. The Vendors list is displayed.
- 4. Open the Vendor card for the Vendor for whom you want to store an additional information.

\leftarrow	Vendor Card				Ŀ	+	ÎI -	
	10000 · Fabrikam, Inc.							
	Home Request Approval New Document Vendor Prices & Discou	unts Repo	ort Actions \lor Related \lor Reports \lor Aut	omate \vee Fewer option	IS			
	🖼 Ledger Entries 🔹 Dimensions 😥 Statistics 🕴 Attachment	ts 🔯 Aj	pprovals 👎 Comments 🖺 Document Layout	s 🕅 Sent Emails	🖪 Bank /	Accounts	₴ Item References ① Additional Information	
	General							Show more
	No		Balance (LCY)	59.7	767,10			
	Name · · · · · · · · · · · · · · · · · · ·		Balance (LCY) As Customer		0,00	Addit	ional Information	
	Blocked	\sim	Balance Due (LCY)	1.9	964.30			

- 5. Click on **Vendor** > **Additional Information** in the menu bar.
- 6. The Additional Information page is displayed.

Additional Information 🔎 🗊 🕂 Ne	ew 🐺 Edit Lis	t 🗎 Delete			¢ 7
Information	Fi	inished Y Area	▼ Si	tarting Date T	Ending Date T
\rightarrow					

Details

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- 7. To create a new additional information, click on the **New** option in the menu bar.
- 8. Enter a description for the additional information in the Information column.
- 9. The checkbox under the Completed column is used to control whether this additonal information is activated, i.e. whether it is displayed in documents and the corresponding cards.
- 10. Select a value under the Area column to control on which documents the additonal information is to be displayed.
- 11. Enter a start date to define the date from which the additional information is displayed. Leave this field blank if you want the additional information to be displayed immediately.
- 12. Enter an end date to define the date from which the additional information is no longer displayed. Leave this field blank if the additional text is to be displayed without an expiration date.
- 13. After you have defined the general data, you can write out the text in the Details area on the page. The following options are available to you for designing the text:

lcon	Description
Ą	Font: Click on this icon to change the font of the text.
A°	Font Size:

Click on this icon to change the size of the font.

lcon	Description
В	Font Style Bold: Click on this icon to change the font style between bold or normal.
/	Font Style Italic: Click on this icon to change the font style between italic or normal.
U	Font Style Underlined: Click on this icon to change the font style between underlined or normal font style.
D	Background Color: Click on this icon to define the color behind the font.
Α	Font Color: Click on this icon to define the color of the font.
	Bulleted List: Click on this icon to format the selected text as a bulleted list.
	Ordered List : Click on this icon to add a number to the selected text.
←≣	Reduce indentation: Click on this icon to reduce the indentation of the text.
→≣	Increase indentation: Click on this icon to increase the indentation of the text.
"	Quote: Click on this icon to mark the text as a quote.
	Align Left: Click on this icon to align the text to the left.
≣	Align Center: Click on this icon to align the text to the center.
≣	Align Right: Click on this icon to align the text to the right.
®	Add Link: Click on this icon to insert a link into the text.
€ <mark>x</mark>	Delete Link: Click on this icon to remove the selected link in the text.
ײ	Superscript: Click on this icon to format the selected text as superscript.
×₂	Subscript: Click on this icon to format the selected text as subscript.
abe	Strikethrough: Click on this icon to format the selected text with a strikethrough.
	Add Image: Click on this icon to add an image.

lcon	Description								
	Add Alternative Text: Select an image in the text and click on this icon to add an alternative text (image caption).								
₽¢	Text Direction From Left To Right : Click on this icon to format the selected text from left to right.								
٩	Text Direction From Right To Left : Click on this icon to format the selected text from right to left.								
5	Revert Changes: Click on this icon to undo your changes to the text.								
Ç	Repeat: Click on this icon to repeat your changes to the text after you have reverted them.								
Å	Delete Formatting : Click on this icon to remove the formatting from the selected text.								
	Insert Table: Click on this icon to insert a table into the text.								
\leftarrow	Additional Information - Vendor 10000 🗸 Saved 🗖 🧷								
	Additional Information $ ho$ 🗊 $ ho$ New 🐺 Edit List 🛍 Delete 🖄 🏹 🗮								
	Information T Area Starting Date T Ending Date T								
	→ Inventory 30.12.								
	Details								
	Fabrikam carries out an inventory at the end of the year, so items ordered after 30.12.24 will be delivered in the new year at the earliest.								
	$A_A \land^{\diamond} \mathbf{B} / \bigcup \cancel{A} \cong := := := :: :: :: :: :: :: :: :: :: :: $								
You hav purchas	e created an additional information for a Vendor. Below you can see the display for an additional information on a e order.								
← Purcha 106	se Order 🖉 🔄 + 🗉 001 · Fabrikam, Inc.								
Home	Prepare Print/Send Request Approval Order 🕞 Document Line Transfer More options								

For more information on how to deactivate an additonal information, please refer to the chapter Mark Additional	Information
as completed.	

Vendor Invoice No. Vendor INV-2024-0005755

Vendor Shipment No. SHIP-2024-0005124

Status ····· Open

Show more

Additional Information

General

Vendor Name ····· Fabrikam, Inc.

Contact · · · · · · Krystal York

Add Additional Information to Customer

This section describes how to enter an additional information for a customer.

Proceed as follows to store an additional information on the customer:

- 1. Open the search function from the role center (**ALT+Q**).
- 2. Search for **Customers** and click on the corresponding search result.
- 3. The **Customers** list is displayed.
- 4. Open the Customer card for the customer for whom you want to store an additional information.

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ate T

- 7. To create a new additional information, click on the $\ensuremath{\textbf{New}}$ option in the menu bar.
- 8. Enter a description for the additional information in the **Information** column.
- 9. The checkbox under the **Completed** column is used to control whether this additonal information is activated, i.e. whether it is displayed in documents and the corresponding cards.
- 10. Select a value under the Area column to control on which documents the additonal information is to be displayed.
- 11. Enter a start date to define the date from which the additional information is displayed. Leave this field blank if you want the additional information to be displayed immediately.
- 12. Enter an end date to define the date from which the additional information is no longer displayed. Leave this field blank if the additional text is to be displayed without an expiration date.
- 13. After you have defined the general data, you can write out the text in the **Details** area on the page. The following options are available to you for designing the text:

lcon	Description
Ą	Font: Click on this icon to change the font of the text.
A°	Font Size: Click on this icon to change the size of the font.
В	Font Style Bold: Click on this icon to change the font style between bold or normal.
/	Font Style Italic: Click on this icon to change the font style between italic or normal.
U	Font Style Underlined : Click on this icon to change the font style between underlined or normal font style.
R	Background Color: Click on this icon to define the color behind the font.
Δ	Font Color: Click on this icon to define the color of the font.
	Bulleted List: Click on this icon to format the selected text as a bulleted list.
	Ordered List : Click on this icon to add a number to the selected text.
←≣	Reduce indentation: Click on this icon to reduce the indentation of the text.
→≣	Increase indentation: Click on this icon to increase the indentation of the text.
"	Quote : Click on this icon to mark the text as a quote.
	Align Left: Click on this icon to align the text to the left.
≣	Align Center: Click on this icon to align the text to the center.
	Align Right: Click on this icon to align the text to the right.
ß	Add Link: Click on this icon to insert a link into the text.
€ <mark>`</mark>	Delete Link: Click on this icon to remove the selected link in the text.
ײ	Superscript: Click on this icon to format the selected text as superscript.
×₂	Subscript: Click on this icon to format the selected text as subscript.

lcon	Description								
abe	Strikethrough : Click on this icon to format the selected text with a strikethrough.								
	Add Image: Click on this icon to add an image.								
	Add Alternative Text: Select an image in the text and click on this icon to add an alternative text (image caption).								
P	Text Direction From Left To Right : Click on this icon to format the selected text from left to right.								
٩	Text Direction From Right To Left: Click on this icon to format the selected text from right to left.								
5	Revert Changes: Click on this icon to undo your changes to the text.								
Ç	Repeat : Click on this icon to repeat your changes to the text after you have reverted them.								
&	Delete Formatting : Click on this icon to remove the formatting from the selected text.								
	Insert Table: Click on this icon to insert a table into the text.								
\leftarrow	Additional Information - Customer 10000 🗸 Saved 🗖 🧷								
	Additional Information $ ho$ 🗊 $ ho$ New 🖶 Edit List 🗊 Delete								
	Information Finished Area Starting Date Ending Date								
	→ Customer's Person in Charge : □ Sales 01.01.2025								
[Details								
	Jacob Otto leaves Adatum Corporation at the end of 2024. Beainning from 01.01.24 please use the following email address purchase@adatum-corporation.com.								
L	$A_A \land^{\circ} \mathbf{B} / \bigcup \swarrow \land A \equiv A \equiv A \equiv B \Rightarrow B$								

You have created an additional information for a customer. The **Sales** setting under the **Area** column means that the additonal information is only displayed on sales documents. Below you can see the display for a note text on a sales quote.

Home Prepare	Print/Send Req	uest Approval Quot	e More opti	ons			
🖉 HTML Editor	🖉 Text Designe	r 👌 Make Order	최 Make Invo	ice 🗋 Releas	e 🗸 🖷 Arc	hive Documen	t 💷 Rich
General							
Customer Name	AI	pine Ski House		··· Docu	ment Date		03.04.2024
External Document N	0. • • • • • •			Due [)ate		17.04.2024
Contact	la	n Deberry		··· Requ	ested Delivery Da	ate · · · · · ·	
Lines Manage	Line Function	s 🧷 HTML Editor 🛛 🕈	Select items	💷 Insert Ext.	exts 🔒 Dime	ensions 🔩	Suggest sale
Lines Manage	Line Function Collete Line Page Rich Break Text	s 🖉 HTML Editor 🕈	Select items Alo. Ir	Insert Ext.	Texts 🎝 Dime Item Reference No.	ensions	. Suggest sale:

← Sales Quote

For more information on how to deactivate an additonal information, please refer to the chapter Mark Additional Information as completed.

Add Additional Information to Item

This chapter describes how to add additional information to an item.

If there are additional information for an item and the item is used in a sales or purchase document, exclamation marks is displayed in the document lines under the **Additional Information** column to indicate that there are information for the item.

To add information to an item, proceed as follows:

- 1. Call up the search function from the role center (**ALT+Q**).
- 2. Search for **Items** and click on the corresponding search result.
- 3. The **Items** list is displayed.
- 4. Open the item card for the item for whom you want to store an additional information.

\leftarrow	Item Card	Ċ	+ 🗊	
	10010 · Stihl Chain Saw			
	Home Request Approval Item Prices & Discounts Actions \lor Related \lor Reports \lor Automate \lor Fewer options			
	Item			Show more
	No	\sim	Unformatted Manufacturer It	
	Description	\sim	Variant Mandatory if Exists	Default (No)
	Blocked · · · · · · · OR OR	\sim		
	Type · · · · · · · Inventory · Manufacturer Item No. · · · · · 00161513144		Additional Information	111

5. Click on Item > Additional Information in the menu bar.

6. The Additional Information page is displayed.

Additional Information 🖉 🖪	+ New	🕏 Edit List	🗓 Dele	ete		¢ 7
Information		Fini T	shed	Area T	Starting Date T	Ending Date T
\rightarrow				All		
Details						

- 7. To create a new additional information, click on the **New** option in the menu bar.
- 8. Enter a description for the additional information in the **Information** column.
- 9. The checkbox under the **Completed** column is used to control whether this additonal information is activated, i.e. whether it is displayed in documents and the corresponding cards.
- 10. Select a value under the Area column to control on which documents the additonal information is to be displayed.
- 11. Enter a start date to define the date from which the additional information is displayed. Leave this field blank if you want the additional information to be displayed immediately.
- 12. Enter an end date to define the date from which the additional information is no longer displayed. Leave this field blank if the additional text is to be displayed without an expiration date.
- 13. After you have defined the general data, you can write out the text in the **Details** area on the page. The following options are available to you for designing the text:

lcon	Description
Ą	Font: Click on this icon to change the font of the text.

lcon	Description
A°	Font Size: Click on this icon to change the size of the font.
В	Font Style Bold: Click on this icon to change the font style between bold or normal.
/	Font Style Italic: Click on this icon to change the font style between italic or normal.
U	Font Style Underlined: Click on this icon to change the font style between underlined or normal font style.
\square	Background Color: Click on this icon to define the color behind the font.
Δ	Font Color: Click on this icon to define the color of the font.
	Bulleted List: Click on this icon to format the selected text as a bulleted list.
Ì	Ordered List : Click on this icon to add a number to the selected text.
←≣	Reduce indentation: Click on this icon to reduce the indentation of the text.
→≣	Increase indentation: Click on this icon to increase the indentation of the text.
"	Quote: Click on this icon to mark the text as a quote.
	Align Left: Click on this icon to align the text to the left.
≣	Align Center: Click on this icon to align the text to the center.
Ξ	Align Right: Click on this icon to align the text to the right.
®	Add Link: Click on this icon to insert a link into the text.
€ <mark>x</mark>	Delete Link: Click on this icon to remove the selected link in the text.
× ²	Superscript: Click on this icon to format the selected text as superscript.
×₂	Subscript: Click on this icon to format the selected text as subscript.
abe	Strikethrough : Click on this icon to format the selected text with a strikethrough.

	Description
×	Add Image: Click on this icon to add an image.
2	Add Alternative Text: Select an image in the text and click on this icon to add an alternative text (image caption).
I	Text Direction From Left To Right: Click on this icon to format the selected text from left to right.
٥	Text Direction From Right To Left : Click on this icon to format the selected text from right to left.
2	Revert Changes: Click on this icon to undo your changes to the text.
х Х	Repeat : Click on this icon to repeat your changes to the text after you have reverted them.
2	Delete Formatting: Click on this icon to remove the formatting from the selected text.
	Insert Table: Click on this icon to insert a table into the text.
Ad	lditional Information - Item 10010 🗸 Saved 🗖 🦉
Ad Ad	Iditional Information - Item 10010 ✓ Saved C 2 Iditional Information P I + New E Idit List Delete P I = C 2 I I I = C 2 I I
Ad Ad	Iditional Information - Item 10010 ✓ Saved C 2 Iditional Information 2 C 1 + New B Edit List Delete 2 C 1 = 2 Information Finished Area Starting Date Ending Date
Ad Ad	Iditional Information - Item 10010 Iditional Information P Information Finished Area Starting Date Ending Date Information Finished Area Starting Date Ending Date Information Information P Finished Area Starting Date Ending Date Information Information P Finished Area Starting Date Ending Date Information Information P Information Finished Area Starting Date Ending Date Image: Discontinued model
Ad	Additional Information - Item 10010 Additional Information P Information Finished Area Starting Date Ending Date P Discontinued model Information Information Finished Area Starting Date Ending Date Information Information Finished All Information Information Information Information Information Information Information Information Information Information <td< td=""></td<>
Ad Ad	Iditional Information - Item 10010 Information Information Finished Area Starting Date Ending Date Image: Discontinued model Image: Disconti
Ad Ad	Additional Information - Item 10010 Additional Information P Information Finished Area Starting Date Ending Date P Discontinued model Information P Information Finished Area Starting Date Ending Date Information Finished All 01.12.2025 Information P Information Finished Area Starting Date Ending Date Information Information Finished Area Starting Date Ending Date Information Finished All 01.12.2025 Information Information Information Finished All 01.12.2025 Information Information Information Information Information <t< td=""></t<>
Ad Ad De	Iditional Information - Item 1001 Information Information Finished Area Starting Date Ending Date Information Finished Area Starting Date Ending Date Information Finished Area Starting Date Ending Date Information Finished Area Information Finished Area Information Finished Area Information Information
Ad Ad	Additional Information - Item 10010 Additional Information Production of this item will be discontinued on 01.12.2025. Production of this item will be discontinued on 01.12.2025.

You have created an additional information for an item. The **All** setting under the **Area** column means that the additonal information is displayed in all business areas (in purchase, sales and service documents). Below you can see the display of an additional information for an item on a sales quote line.

Home Prepare	Print/Send Req	uest Approval Quot	e More opti	ons			
🖉 HTML Editor	🖉 Text Designe	r 👌 Make Order	최 Make Invo	ice 🗋 Releas	e 🗸 🖷 Arc	hive Documen	t 💷 Rich
General							
Customer Name	AI	pine Ski House		··· Docu	ment Date		03.04.2024
External Document N	0. • • • • • •			Due [)ate		17.04.2024
Contact	la	n Deberry		··· Requ	ested Delivery Da	ate · · · · · ·	
Lines Manage	Line Function	s 🧷 HTML Editor 🛛 🕈	Select items	💷 Insert Ext.	exts 🔒 Dime	ensions 🔩	Suggest sale
Lines Manage	Line Function Delete Line Page Rich Break Text	s 🖉 HTML Editor 🕈	Select items Alo. Ir	Insert Ext.	Texts 🎝 Dime Item Reference No.	ensions	. Suggest sale:

← Sales Quote

For more information on how to deactivate an additonal information, please refer to the chapter Mark Additional Information as completed.

Add Additional Information to Service Items

This chapter describes how to add additional information for a service item.

If additional information are stored for a service item and this service item is used in a service document, icons are displayed in the document lines under the **Additional Information** column to indicate that additional information are stored.

To add additional information for a service item, proceed as follows:

To add information to an item, proceed as follows:

- 1. Call up the search function from the role center (**ALT+Q**).
- 2. Search for Service Items and click on the corresponding search result.
- 3. The Service Items list is displayed.
- 4. Open the service item card for the service item for whom you want to store an additional information.

Service Item Ca	ard			$(\ensuremath{\mathcal{O}})$	È	+ 🛍	
SV0000	02 · Caterpillar 345BL						
🛅 Create Sen	vice Order 🗸 🛛 Images 🛯 Navigate Item Trou	bleshooting					
General							
No. • • • • • • •	SV000002		Serial No. CAT-32546FBY			Preferred Resource	
Description · ·	Caterpillar 345BL		Service Item Components · · · · · No			Blocked ·····	~
Item No.	1004	\sim	Search Description CATERPILLAR 345BL				
Item Descriptio	n Caterpillar 345BL		Last Service Date			Additional Information · · · · · · · · · · · · · · · · · · ·	

- 5. Click on **Item > Additional Information** in the menu bar.
- 6. The Additional Information page is displayed.

1

Additional Information 🔎 🗊 🕂	New 🐯 Edit List	Delete		e y
Information	Fin	ished Area Y	Starting Date T	Ending Date T
\rightarrow		□ AII		
Details				

- 7. To create a new additional information, click on the **New** option in the menu bar.
- 8. Enter a description for the additional information in the Information column.
- 9. The checkbox under the **Completed** column is used to control whether this additonal information is activated, i.e. whether it is displayed in documents and the corresponding cards.
- 10. Select a value under the Area column to control on which documents the additonal information is to be displayed.
- 11. Enter a start date to define the date from which the additional information is displayed. Leave this field blank if you want the additional information to be displayed immediately.
- 12. Enter an end date to define the date from which the additional information is no longer displayed. Leave this field blank if the additional text is to be displayed without an expiration date.
- 13. After you have defined the general data, you can write out the text in the **Details** area on the page. The following options are available to you for designing the text:

lcon	Description
Ą	Font: Click on this icon to change the font of the text.
A	Font Size: Click on this icon to change the size of the font.
В	Font Style Bold: Click on this icon to change the font style between bold or normal.
/	Font Style Italic: Click on this icon to change the font style between italic or normal.
U	Font Style Underlined: Click on this icon to change the font style between underlined or normal font style.
\square	Background Color: Click on this icon to define the color behind the font.
Α	Font Color: Click on this icon to define the color of the font.
	Bulleted List: Click on this icon to format the selected text as a bulleted list.
	Ordered List : Click on this icon to add a number to the selected text.
←≣	Reduce indentation: Click on this icon to reduce the indentation of the text.
→≣	Increase indentation: Click on this icon to increase the indentation of the text.
"	Quote : Click on this icon to mark the text as a quote.
	Align Left: Click on this icon to align the text to the left.
≣	Align Center: Click on this icon to align the text to the center.
Ξ	Align Right: Click on this icon to align the text to the right.
S	Add Link: Click on this icon to insert a link into the text.
€ <mark>×</mark>	Delete Link : Click on this icon to remove the selected link in the text.
ײ	Superscript: Click on this icon to format the selected text as superscript.
×₂	Subscript: Click on this icon to format the selected text as subscript.

lcon	Description
abe	Strikethrough : Click on this icon to format the selected text with a strikethrough.
a	Add Image: Click on this icon to add an image.
2	Add Alternative Text: Select an image in the text and click on this icon to add an alternative text (image caption).
₽¶	Text Direction From Left To Right : Click on this icon to format the selected text from left to right.
٩	Text Direction From Right To Left: Click on this icon to format the selected text from right to left.
り	Revert Changes: Click on this icon to undo your changes to the text.
Ç	Repeat : Click on this icon to repeat your changes to the text after you have reverted them.
∞	Delete Formatting : Click on this icon to remove the formatting from the selected text.
	Insert Table: Click on this icon to insert a table into the text.
\leftarrow	Additional Information - Service Item SV000002 🗸 Saved 🗖 🦯
	Additional Information $ ho$ 🗈 $ ho$ New 🕏 Edit List 🛍 Delete 🖄 🏹 🗮
	Information T Area Starting Date T Ending Date T
	Oil in Coolant : All 24.10.2024
	Details
	Oil was detected in the cooling water during the inspection on 24.10.2024. The customer was informed that this may be due to engine damage and that consequential damage to other components can only be avoided by repair.
	be avoided by repair.
	Please mark as completed if a repair has been carried out.

You have created an additional information for a service item. The **All** setting under the **Area** column means that the additional information is displayed in all business areas. Below you can see the display of an additional information for a service item on a service order line.



SVO000013 · Adatum Corporation · Caterpillar 345BL

General								
escription	Caterpillar 34	5BL		Phone No.				
ustomer No.	10000		\sim	Email · · · · · · · · · · · · · · · · · · ·	jakol	b.otto@co	ntoso.com	
ontact No.	KT000001			Service Order Type	WAR	R-CAT		~
ell-To				Contract No.				
ame ·····	Adatum Corp	oration		Response Date	08.04	4.2024		
ddress · · · · · · · · · · · · · · · · · ·	Station Road,	21		Response Time	13:49	9:56		
ty	Düsseldorf			Priority	Low			
ost Code	48436			Status	Pend	ling		\sim
ountry/Region Code			\sim	Release Status	Ope	n		
ontact Name	Jakob Otto							
ines Manage Line Fund	tions Order							
₽ [#] New Line ₽ Delete Line	🖉 HTML E	ditor 🔳 Ri	ch Text					
Service Item Rich No. Text	Additional Information	Item No.	Serial No.	Description	Repair Statu Code	ıs War.	Contract No.	Service Price Group Code
> <		1004	CAT 22546EDV	Catorpillar 245Pl	ANEANC		1	

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For more information on how to deactivate an additonal information, please refer to the chapter Mark Additional Information as completed.

Continue with the chapter Mark Additional Information as completed

Mark Additional Information as completed

This chapter describes how you can mark an additional informmation as completed.

If all additional information for an item, service item, customer or vendor have been completed or the additional information have been deleted, the exclamation marks in the **Additional Information** column are no longer displayed in the documents and on the cards.

Proceed as follows to mark a note text as completed:

- 1. Click on the exclamation marks in the document line under the **Additional Information** column or on the card in the **Additional Information** field.
- 2. The Additional Information window is displayed.

Additional Info	rmation $>$	🖪 🛛 🕂 New	🐺 Edit	List	🔟 De	lete		e y
Informatio	n			Fini T	ished	Area	Starting Date T	Ending Date 🖷
Oil in Co	olant		÷			All	24.10.2024	
Details								
Details Oil was detect The customer	ed in the cooling was informed th	g water during the at this may be due	inspectio to engin	n on e dar	24.10.20 mage an)24. d that consec	quential damage to other	components can
Details Oil was detect The customer be avoided by	ed in the cooling was informed th repair.	g water during the at this may be due	inspectio to engin	n on e dar	24.10.20 mage an)24. d that consec	quential damage to other	components can

- 3. Click on the **Edit List** option in the menu bar.
- 4. Select the checkbox under the **Completed** column for the Additional Information.

You have marked the addition information as **Completed**.