BEYOND
INDICATOR

User Guide

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Table of Contents

Preface

This documentation contains information on how to install and operate **Beyond Indicator** 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 Indicator**.

Read this documentation in full to set up **Beyond Indicator** 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 Indicator** and keep the documentation in a place that is accessible to your employees.

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Manufacturer

Beyond Indicator is developed by:

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VISIT APPSOURCE

Version history

Version	Date	Author	Comment
1.0	20.01.2023	Jannic Weidel	Initial version of the documentation
1.1	12.05.2023	Jannic Weidel	Added Chapter for assigning permission sets
1.2	12.06.2025	Jannic Weidel	Added Preface chapter
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:

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.

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.

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.

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.

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 Indicator is an extension for Microsoft Dynamics 365 Business Central.

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

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

For more information, see the chapter Create Indicator for Sales Lines for Available Quantity.

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

The examples described in this documentation represent only a part of the possibilities offered by the **Beyond Indicator** solution. If you have a specific case that you would like to map via the solution, please feel free to contact us.

NOTE

No dependencies from or to other apps

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

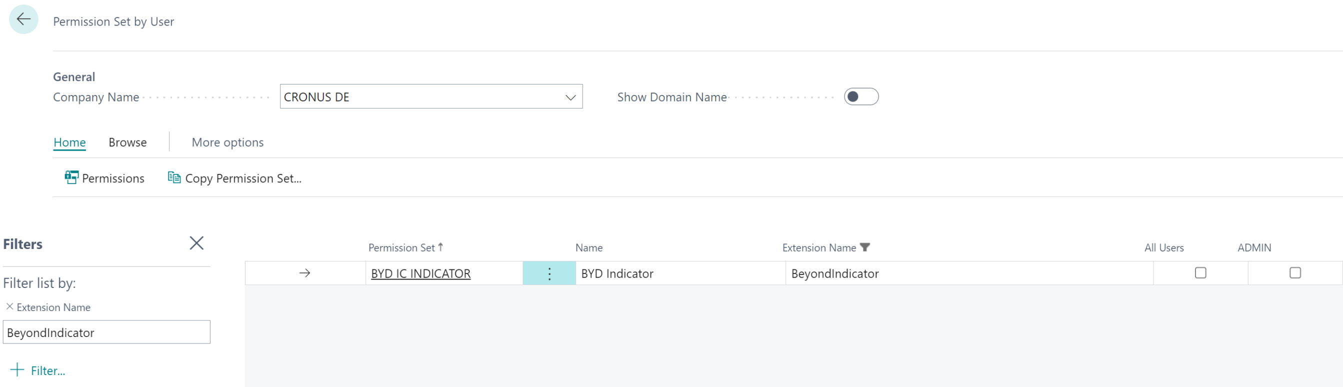
Assign User Permissions

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

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

To assign the permission set for **BEYOND Indicator** to a user, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Permission Sets** and click on the appropriate search result.
3. The **Permission Sets** page is displayed.
4. Select one of the above permission sets from the list.
5. Click **Related** > **Permissions** > **Permission Set by User** in the menu bar.

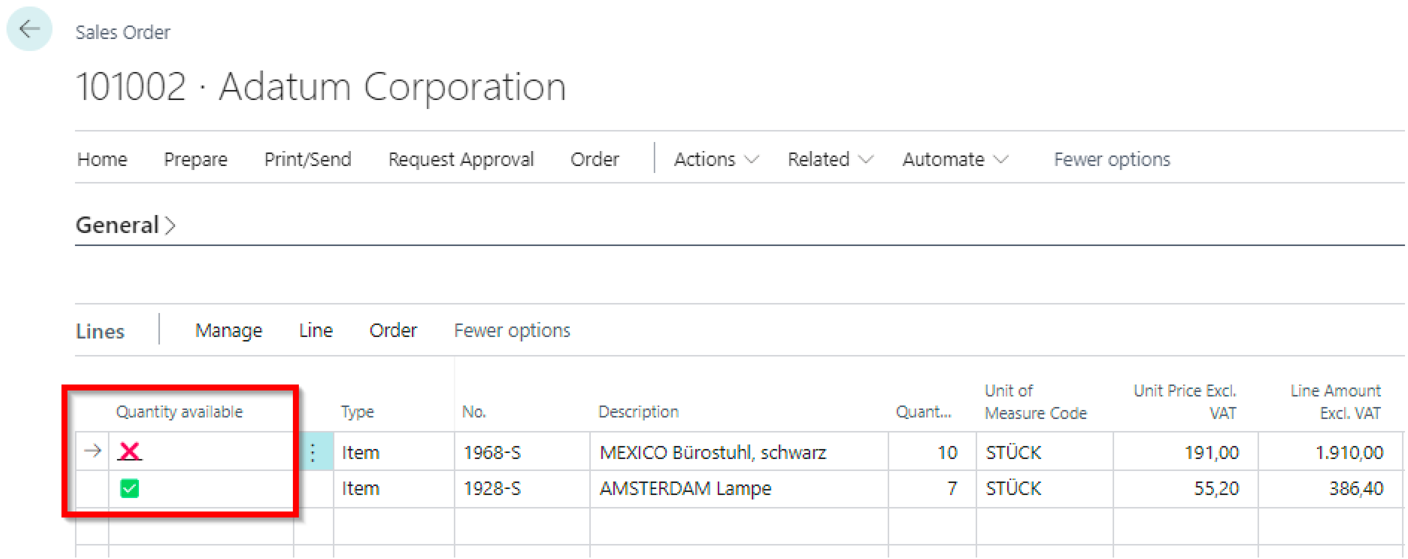


6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondIndicator** as filter criteria.
8. The list is filtered to the permission sets of **BeyondIndicator**.
9. Select the check box on the right side of the page for the user or users to whom you want to assign the permission set.

You have assigned a permission set for **BEYOND Indicator** to a user. Note that users with the **SUPER** permission set have all rights, i.e. you do not need to give this user any additional rights.

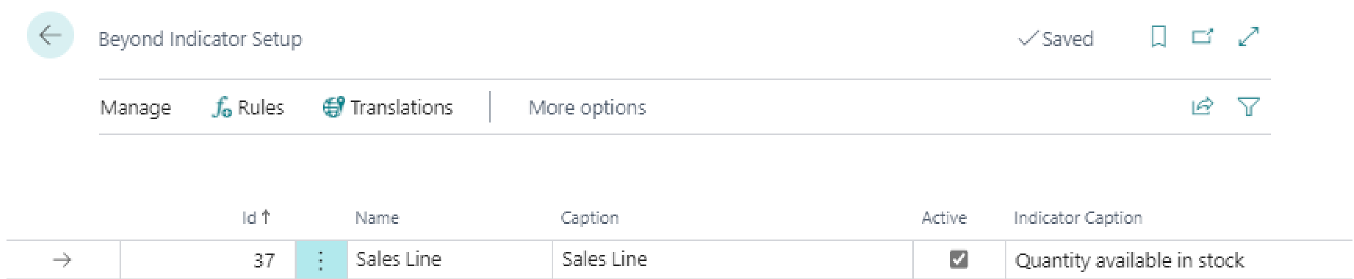
Create Indicator for Sales Lines regarding available Quantity

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



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

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

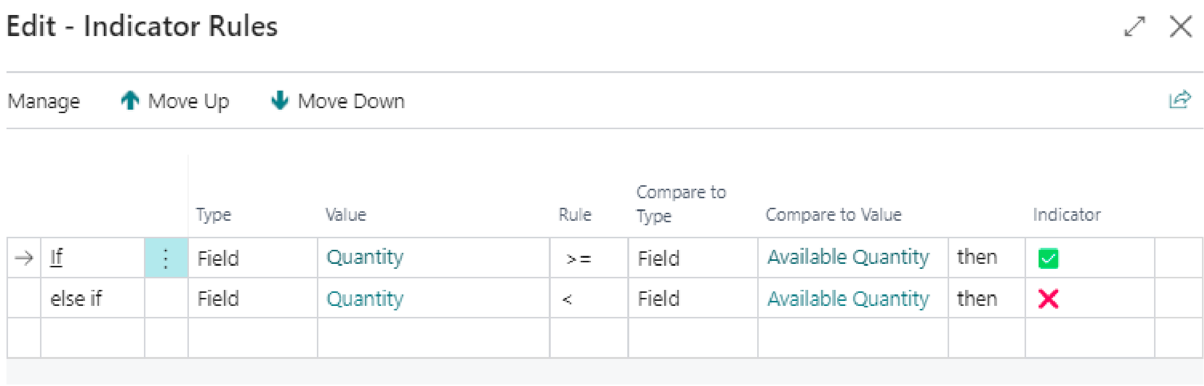


8. To define one or more rules for the indicator, click **Rules** in the menu bar.
9. The **Edit - Indicator Rules** window is displayed. All defined rules for the selected indicator are displayed here. Two new rules are to be defined for the example:
   - A red cross (□) should be displayed in the indicator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

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

Value: Quantity
Rule: <
Compare to Type: Field
Compare to Value: Available Quantity
Indicator: □

11. For the second rule (quantity in sales line >= available quantity), set the following: **Type**: Field
Value: Quantity
Rule: >=
Compare to Type: Field
Compare to Value: Available Quantity
Indikator: □



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

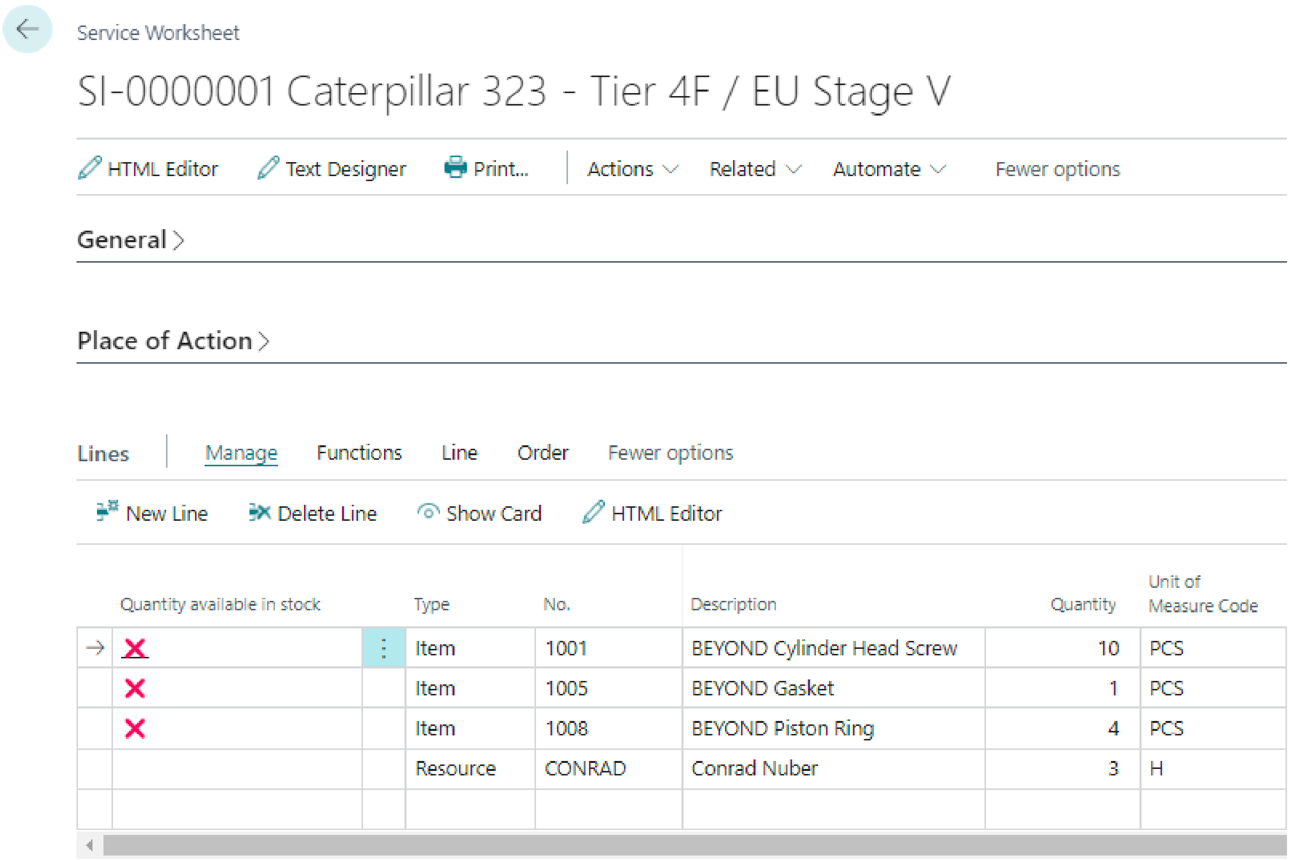
> **NOTE**
>
> **Freely configurable indicators**
> You can freely configure the rules and adjust them to your requirements.
> To give you more rules for sales lines, we have programmed 3 fields:

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

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

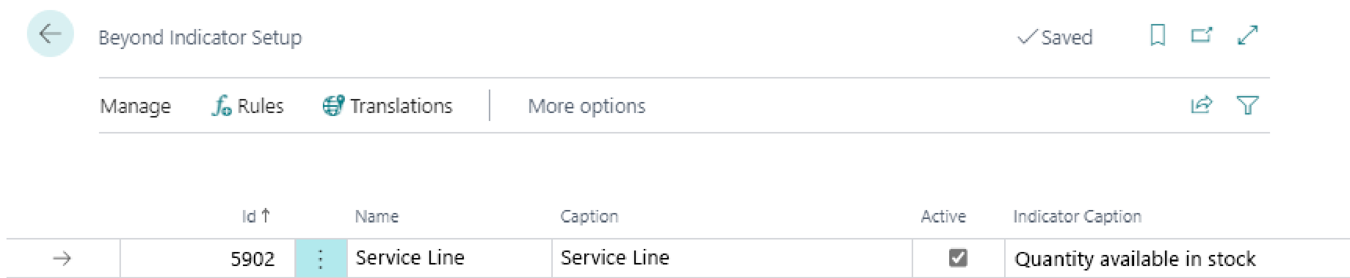
Create Indicator for Service Lines regarding available Quantity

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



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

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

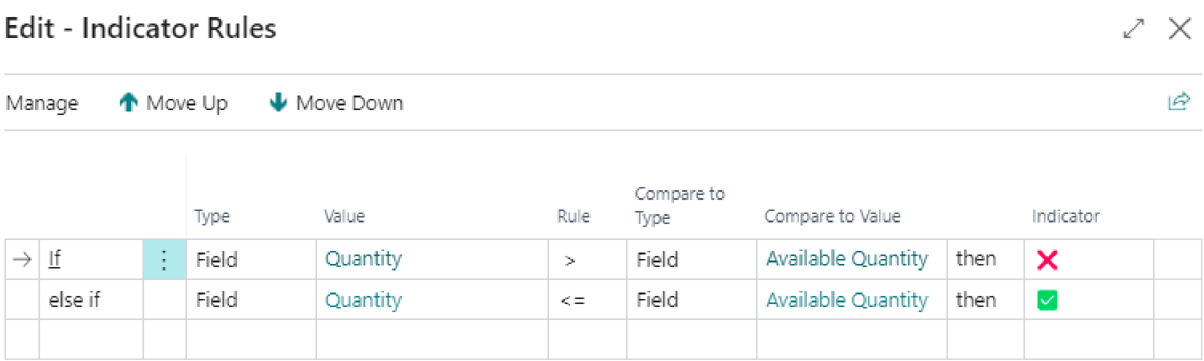


8. To define one or more rules for the indicator, click **Rules** in the menu bar.
9. The **Edit - Indicator Rules** window is displayed. All defined rules for the selected indicator are displayed here. Two new

rules are to be defined for the example:

  - In the indicator column, a red cross (□) should be displayed if the stock level is smaller than the quantity in the line.
  - In the indicator column, a green tick (□) should be displayed if the stock level is greater than or equal to the quantity in the line.

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



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

NOTE

Freely configurable indicators

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

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

- Available Quantity: ID **70839170**

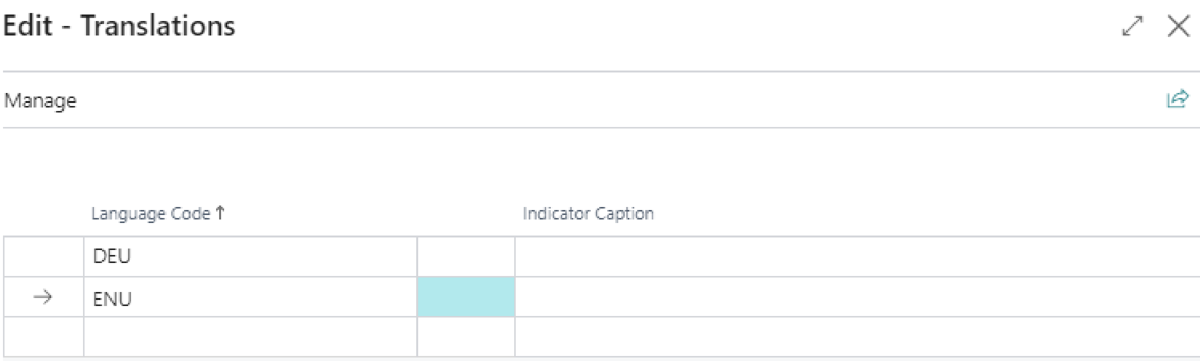
You can store a translation for the indicator caption so that you can use Beyond Indicator for companies that operate the Webclient in different languages. For more information, see the chapter Add Translation for Indicator.

Add translations for Indicator

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

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

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



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

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