BEYOND

Additional Information

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Preface

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

Read this documentation in full to set up **Beyond Additional Information** 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.

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Manufacturer

Beyond Additional Information is developed by:

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VISIT APPSOURCE

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
2.0	18.09.2025	Jannic Weidel	Updated Screenshots for Business Central 26.5
2.1	06.11.2025	Jannic Weidel	Updated Beyond Product Name
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:

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 Additional Information is an extension for Microsoft Dynamics 365 Business Central.

With **Beyond Additional Information** 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	Service	Purchase
Sales Return Order	Service Item Worksheet	Purchase Return Order
Sales Quote	Service Quote	Purchase Quote
Sales Credit Memo	Service Credit Memo	-
Sales Invoice	Service Invoice	-
Sales Order	Service Order	-
Sales Blanket Order	-	-

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 Additional Information** 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 Additional Information Documentation.

NOTE

Dependencies on or to other apps
Additional, basic applications are required to use **Beyond Additional Information**. The following applications are required to use **Beyond Additional Information**:

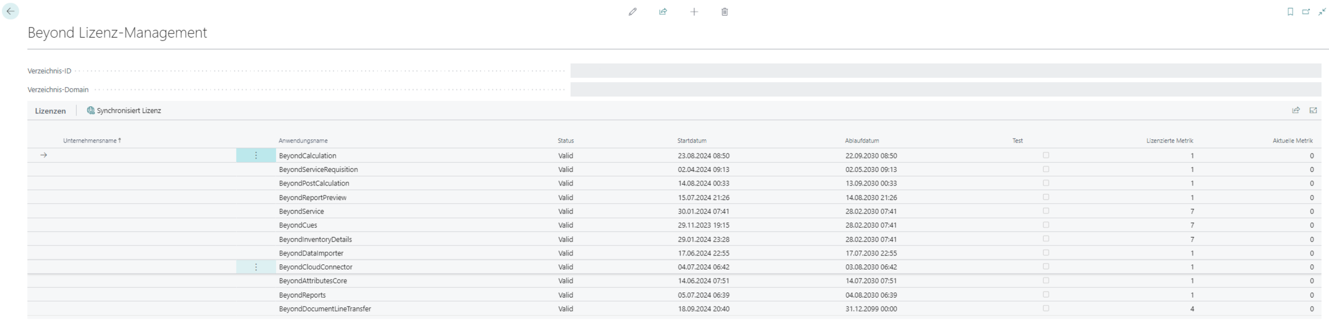
- Beyond License: Management of trial and full licenses for apps of BeyondIT.

License Management

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

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



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.

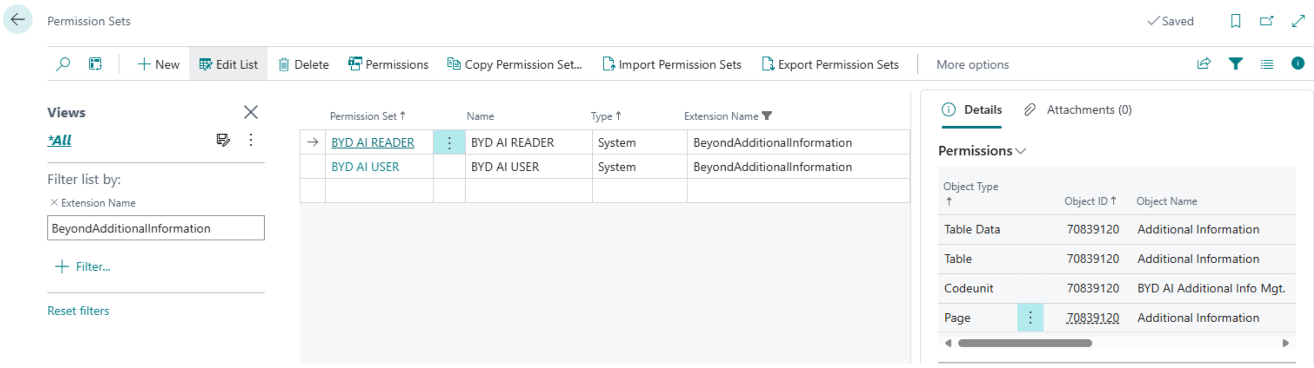
Assign User Permissions

The following description shows how to assign user permissions for the **Beyond Additional Information** 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 Additional Information** 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 **Beyond Additional Information** as filter criteria.
8. The list is filtered to the permission sets of **Beyond Additional Information**.
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.

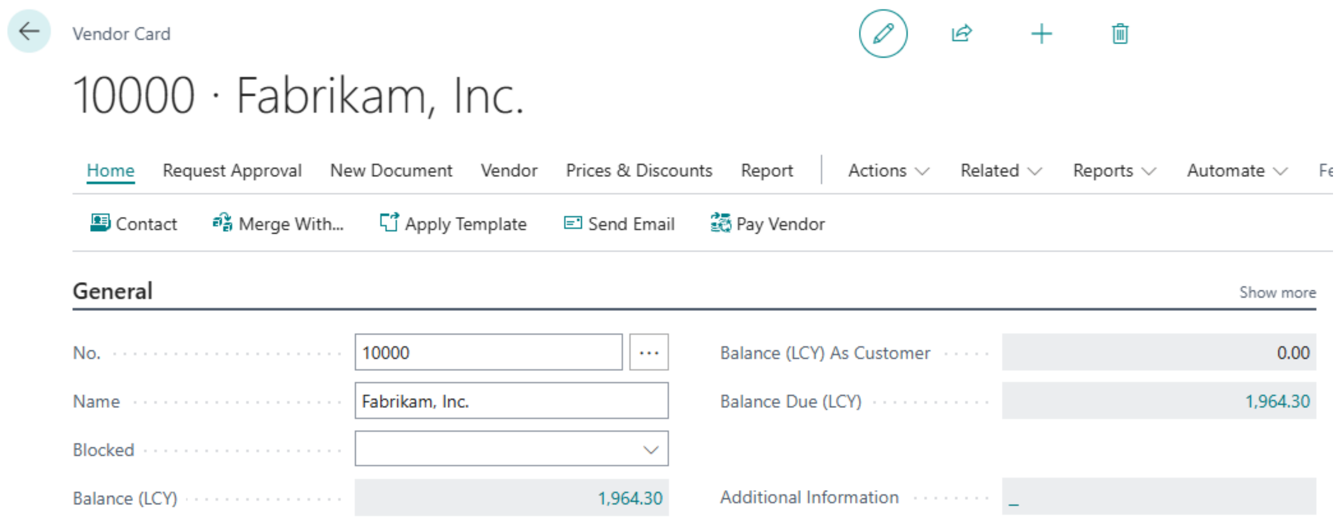
You have assigned a permission set for **Beyond Additional Information** to a user. Note that users with the **SUPER** permission set have all rights, i.e. you do not need to give this user any additional rights.

Add Additional Information to Items

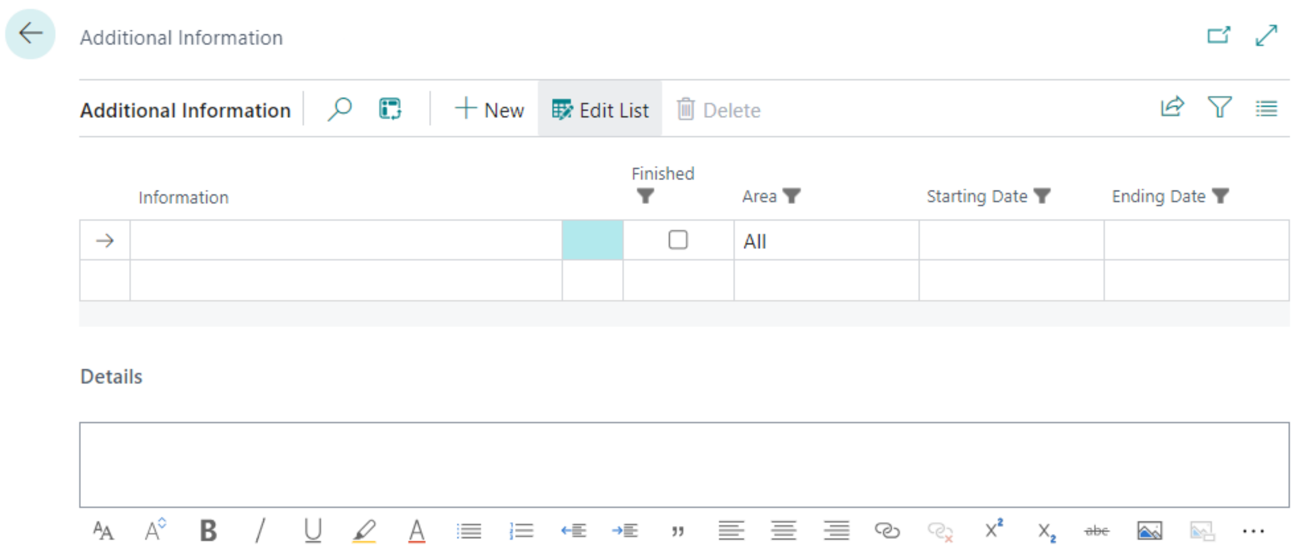
Add Additional Information to Vendor

This section describes how to enter an additonal 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.



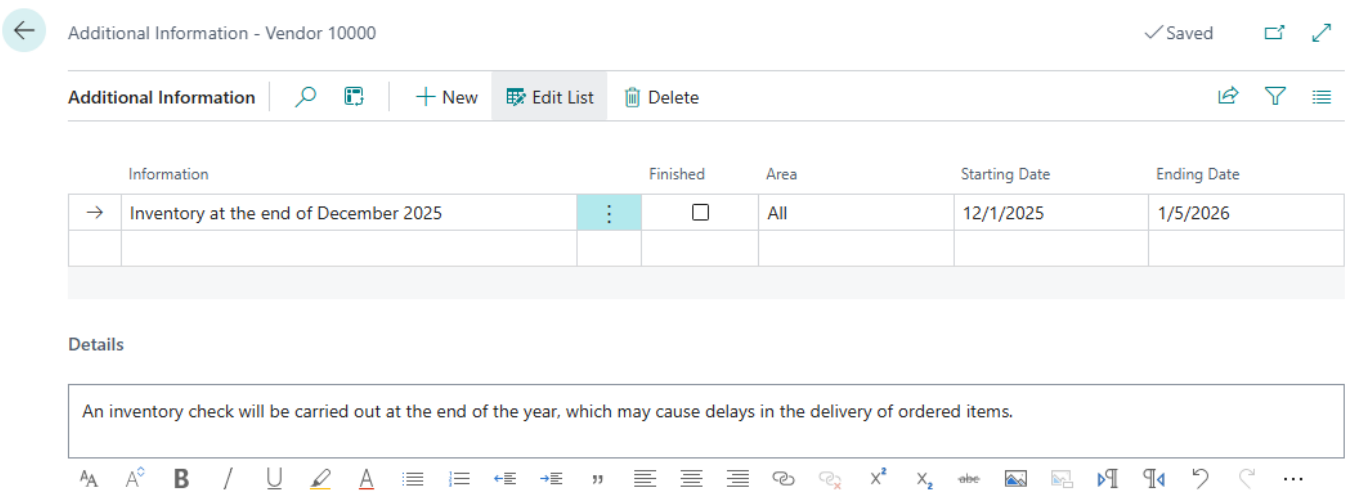
5. Click on **Vendor** > **Additional Information** in the menu bar.
6. The **Additional Information** page is displayed.



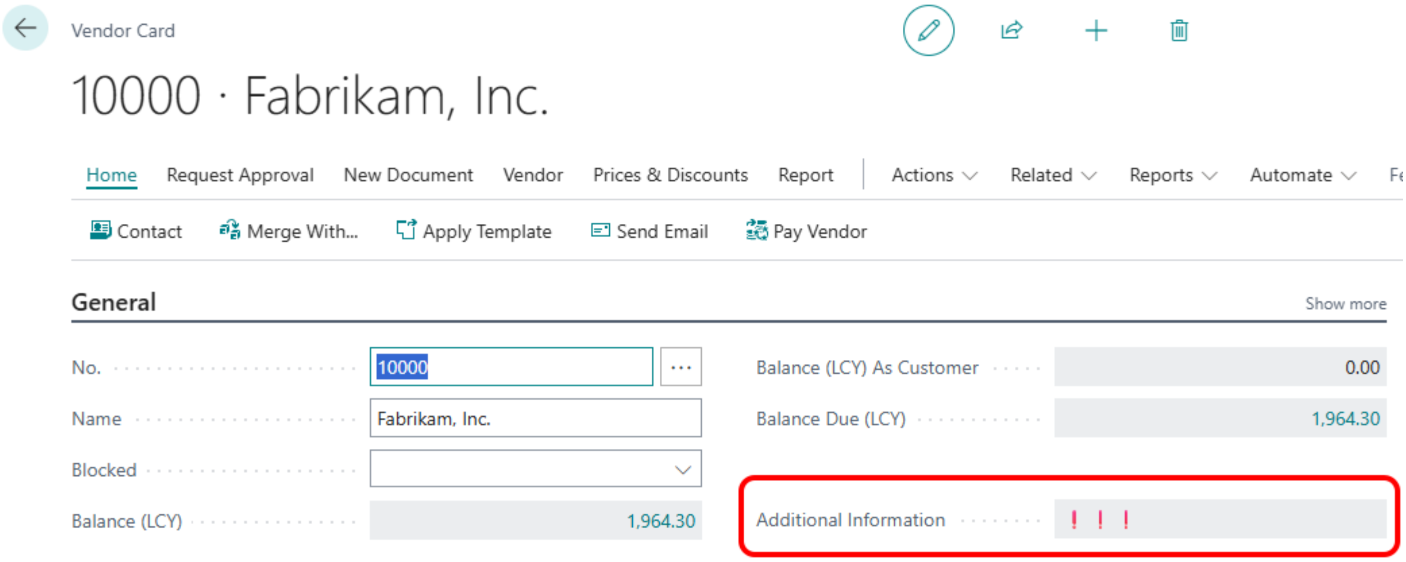
7. To create a new additional information, click on the **New** option in the menu bar.
8. Enter a description for the additional information in the **Information** column.
9. Use the checkbox under the **Completed** column to control whether this additional information text is active. If you activate the checkbox, no symbol indicating an additional information will be 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:

Icon	Description
	Font: Click on this icon to change the font of the text.
	Font Size: Click on this icon to change the size of the font.
	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.
	Font Style Underlined: Click on this icon to change the font style between underlined or normal font style.
	Background Color: Click on this icon to define the color behind the font.
	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.
	Delete Link: Click on this icon to remove the selected link in the text.
	Superscript: Click on this icon to format the selected text as superscript.
	Subscript: Click on this icon to format the selected text as subscript.

Icon	Description
	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).
	Text Direction From Left To Right: Click on this icon to format the selected text from left to right.
	Text Direction From Right To Left: Click on this icon to format the selected text from right to left.
	Revert Changes: Click on this icon to undo your changes to the text.
	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.



You have created an additional information for a Vendor. Below you can see the display for an additional information on a vendor card.

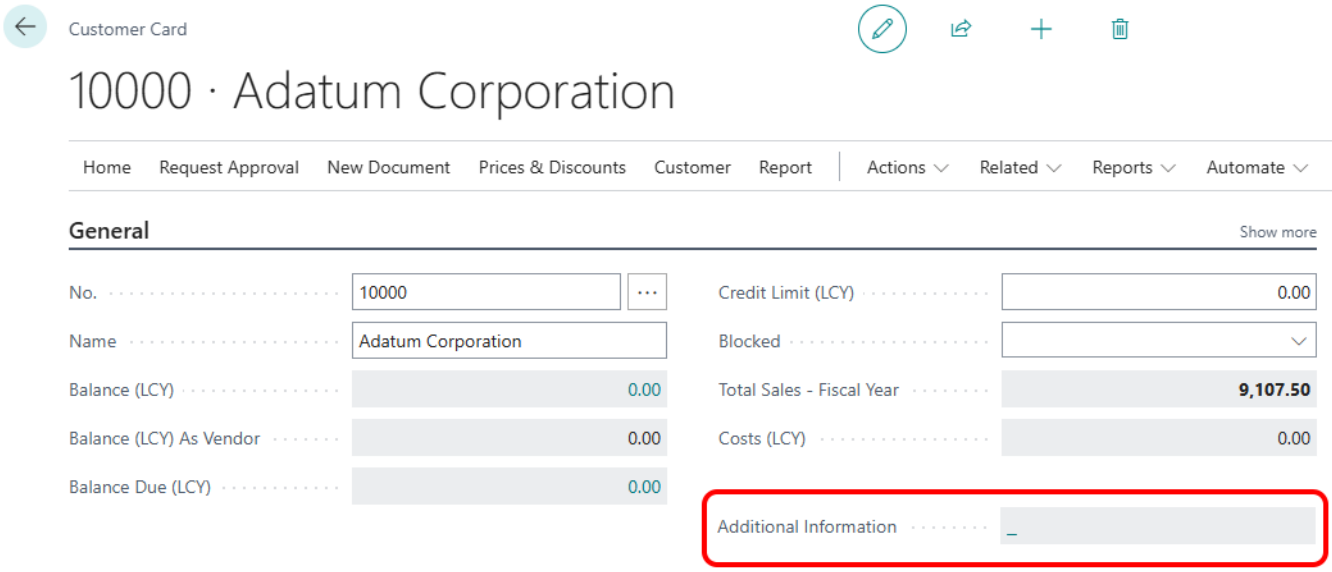


For more information on how to deactivate an additonal information, please refer to the chapter Mark Additional Information as completed.

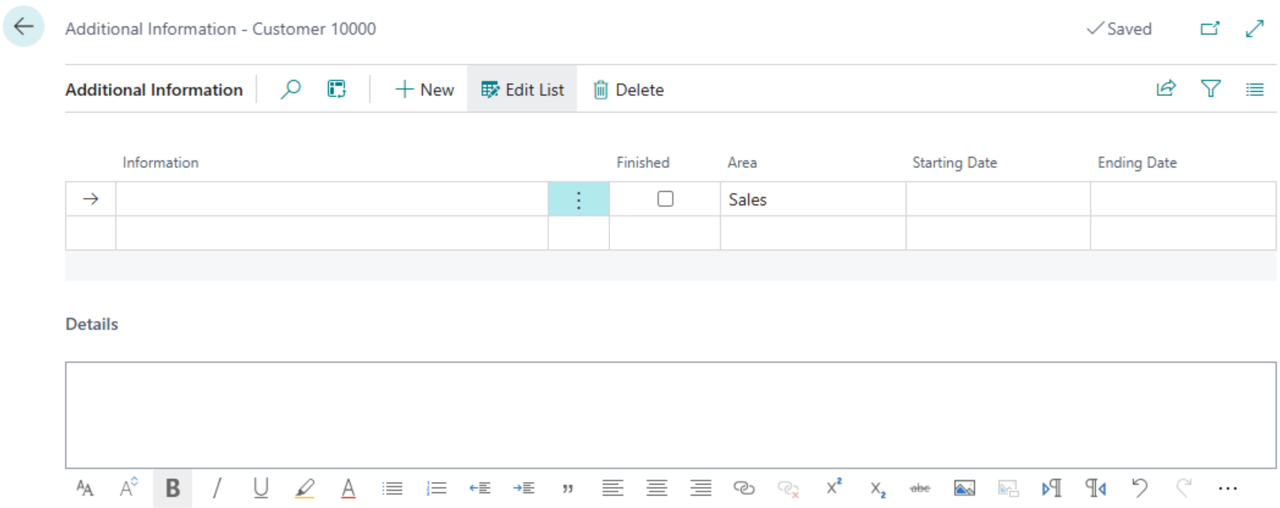
Add Additional Information to Customer

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.



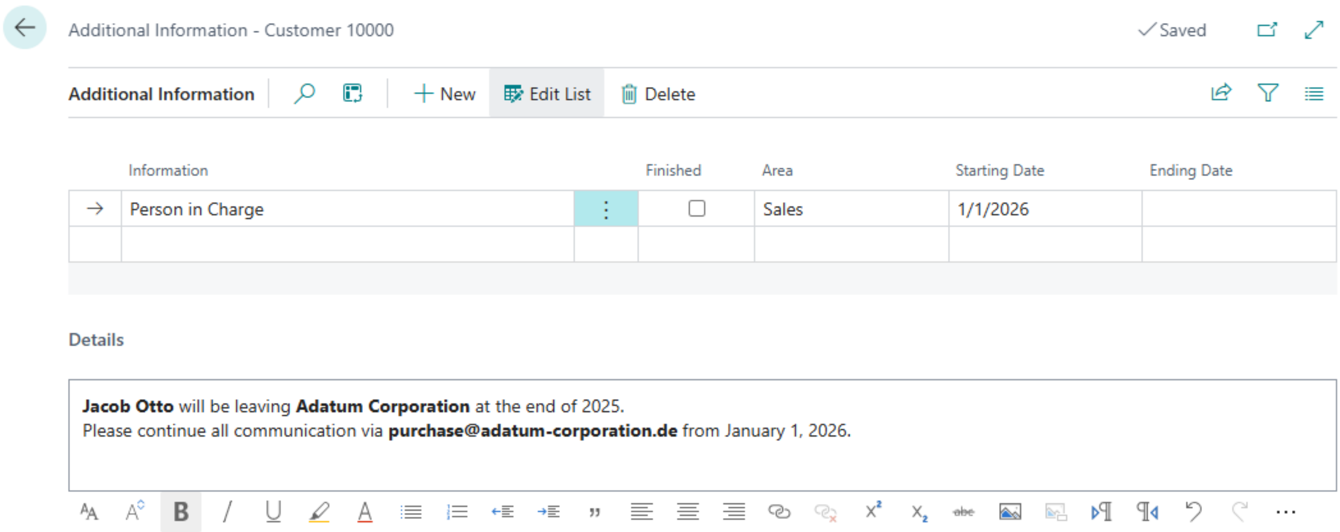
5. Click on **Customer** > **Additional Information** in the menu bar.
6. The **Additional Information** page is displayed.



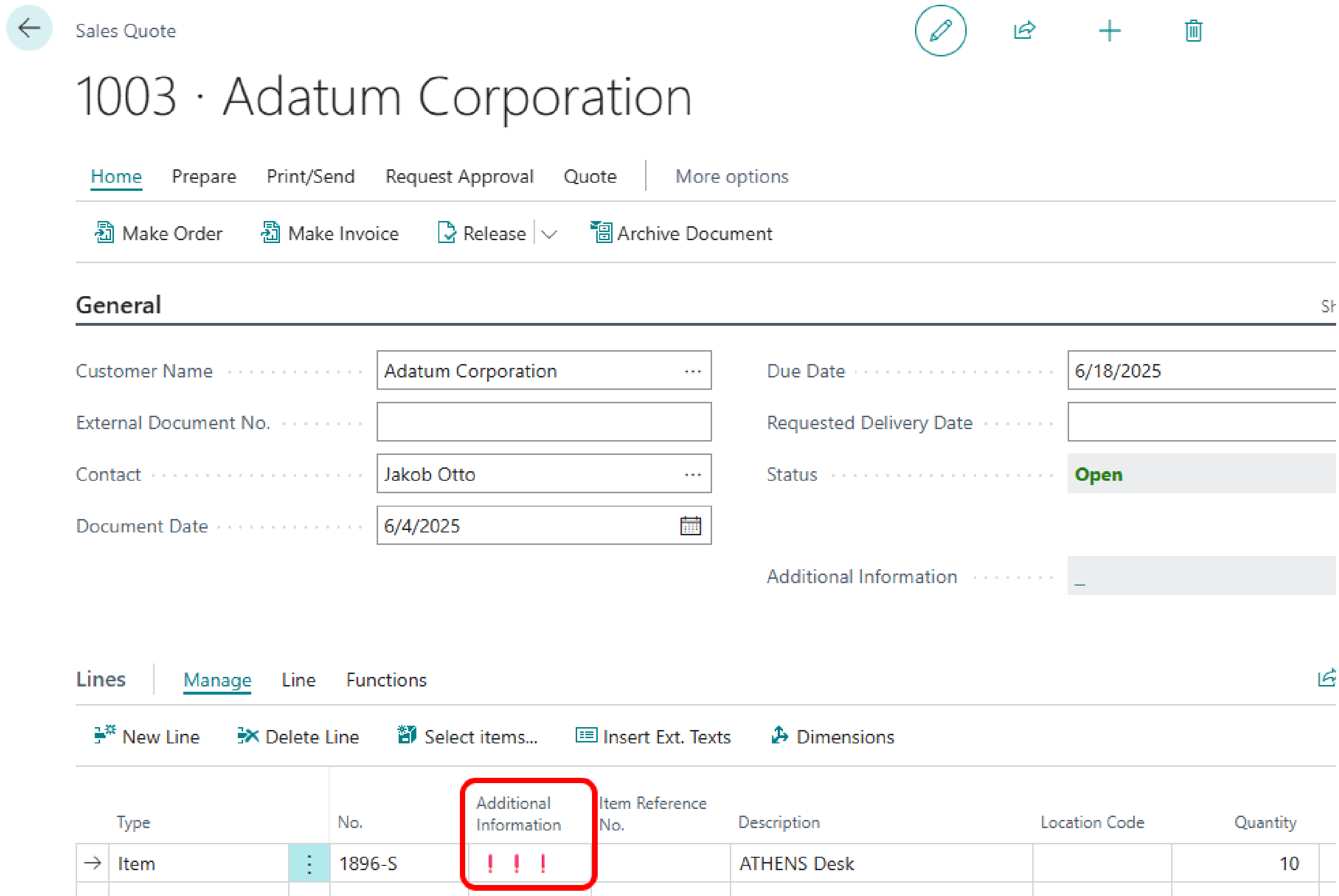
7. To create a new additional information, click on the **New** option in the menu bar.
8. Enter a description for the additional information in the **Information** column.
9. Use the checkbox under the **Completed** column to control whether this additional information text is active. If you activate the checkbox, no symbol indicating an additional information will be 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:

Icon	Description
	**Font**: Click on this icon to change the font of the text.
	**Font Size**: Click on this icon to change the size of the font.
	**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.
	**Font Style Underlined**: Click on this icon to change the font style between underlined or normal font style.
	**Background Color**: Click on this icon to define the color behind the font.
	**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.
	**Delete Link**: Click on this icon to remove the selected link in the text.
	**Superscript**: Click on this icon to format the selected text as superscript.
	**Subscript**: Click on this icon to format the selected text as subscript.

Icon	Description
	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).
	Text Direction From Left To Right: Click on this icon to format the selected text from left to right.
	Text Direction From Right To Left: Click on this icon to format the selected text from right to left.
	Revert Changes: Click on this icon to undo your changes to the text.
	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.



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.



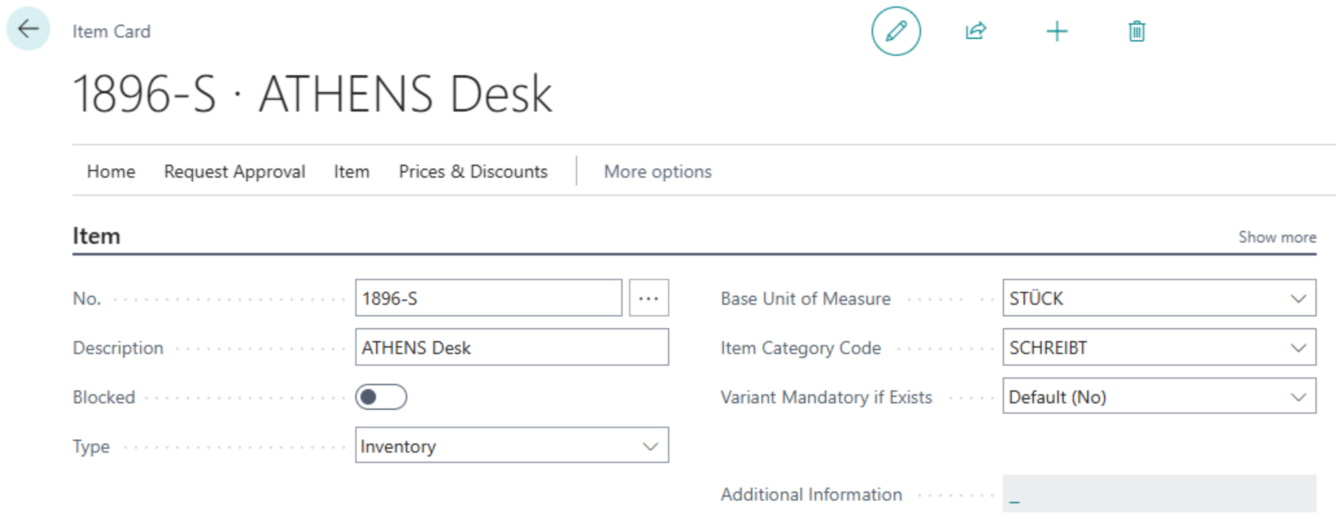
For more information on how to deactivate an additonal information, please refer to the chapter Mark Additional Information as completed.

Add Additional Information to Item

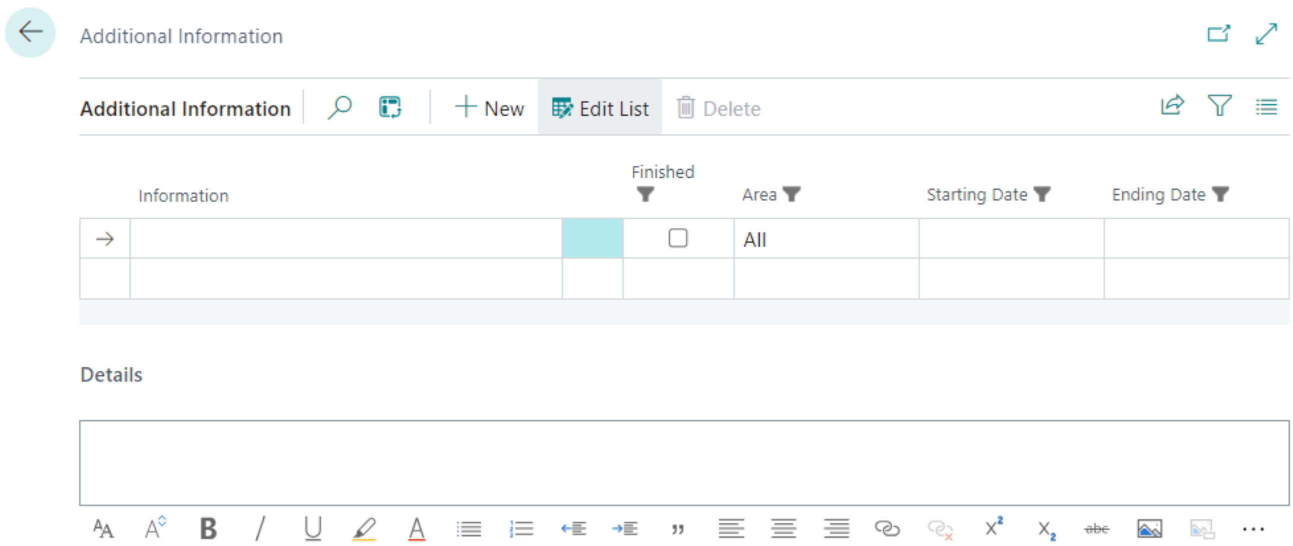
This chapter describes how to add additional information to an item.
If there are additional information for an item and the item is used in a sales or purchase document, exclamation marks is displayed in the document lines under the **Additional Information** column to indicate that there are information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



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

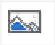


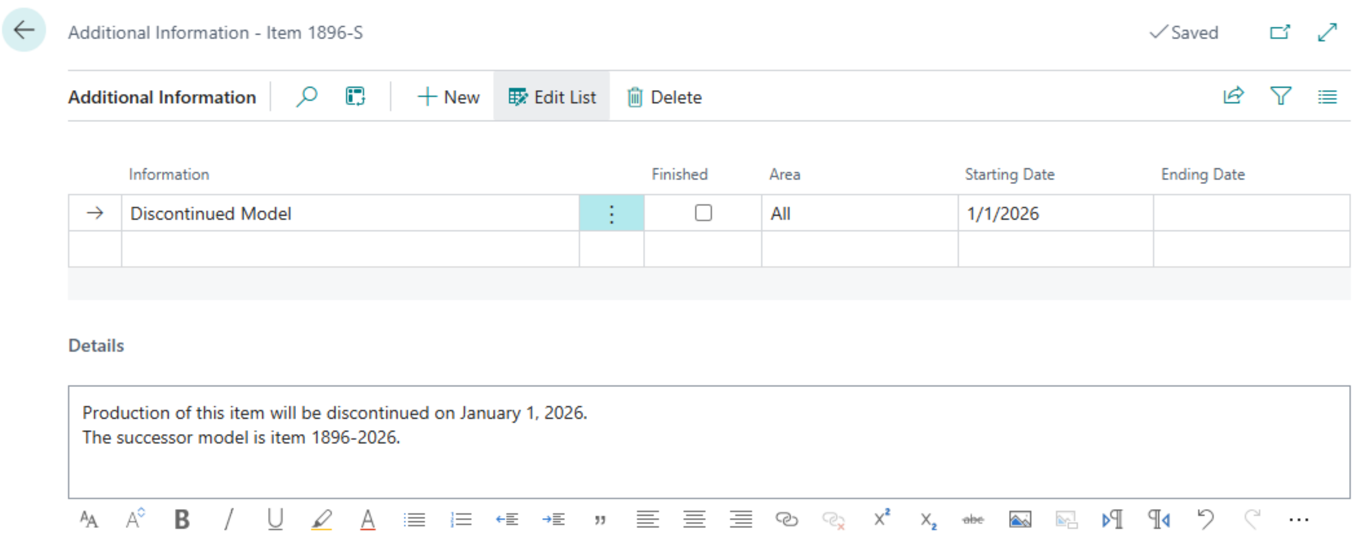
7. To create a new additional information, click on the **New** option in the menu bar.
8. Enter a description for the additional information in the **Information** column.
9. Use the checkbox under the **Completed** column to control whether this additional information text is active. If you activate the checkbox, no symbol indicating an additional information will be 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.

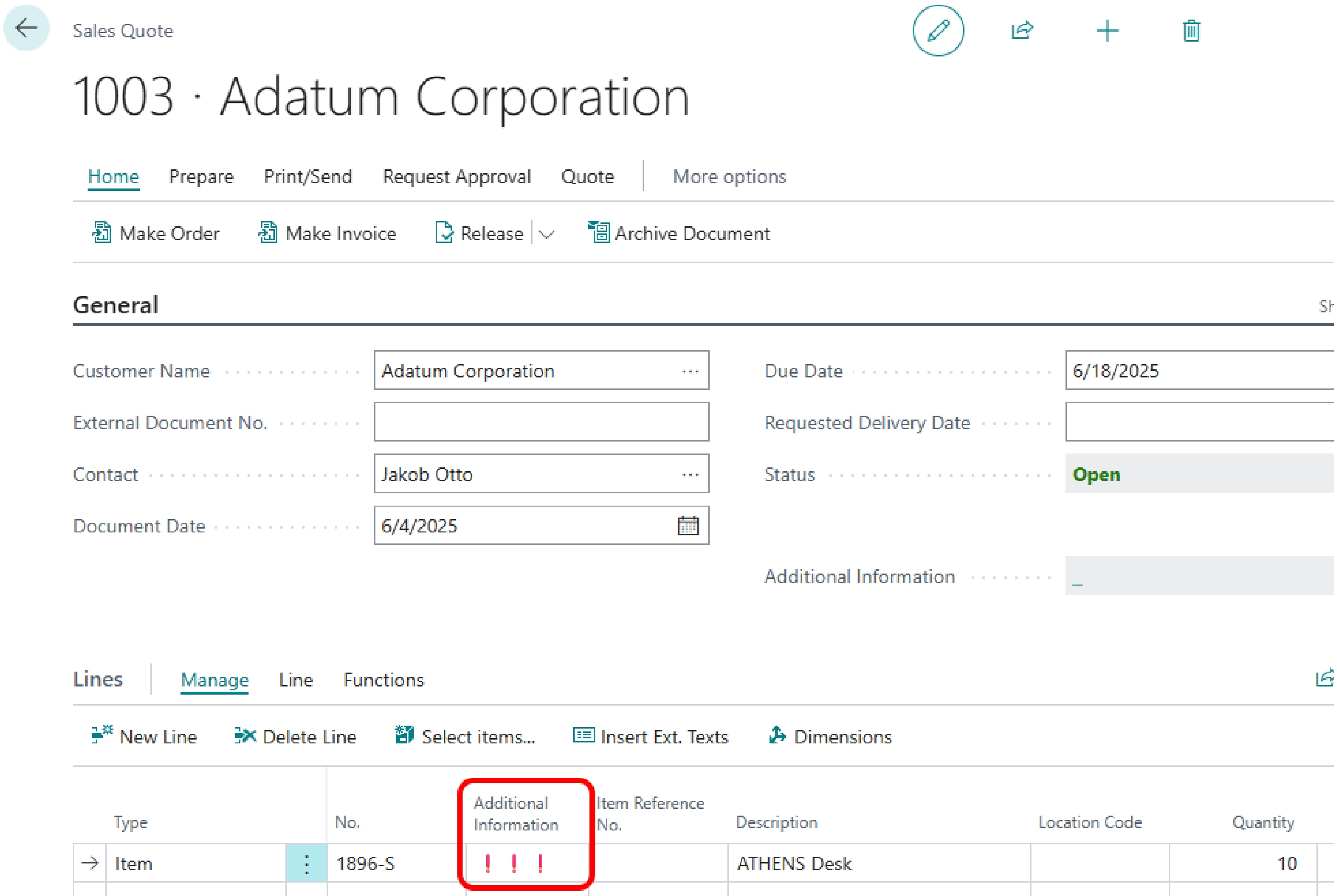
13. After you have defined the general data, you can write out the text in the **Details** area on the page. The following options are available to you for designing the text:

Icon	Description
	Font: Click on this icon to change the font of the text.
	Font Size: Click on this icon to change the size of the font.
B	**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.
	Background Color: Click on this icon to define the color behind the font.
A	**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.
	Delete Link: Click on this icon to remove the selected link in the text.

Icon	Description
	**Superscript**: Click on this icon to format the selected text as superscript.
	**Subscript**: Click on this icon to format the selected text as subscript.
	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).
	**Text Direction From Left To Right**: Click on this icon to format the selected text from left to right.
	**Text Direction From Right To Left**: Click on this icon to format the selected text from right to left.
	**Revert Changes**: Click on this icon to undo your changes to the text.
	**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.



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.



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

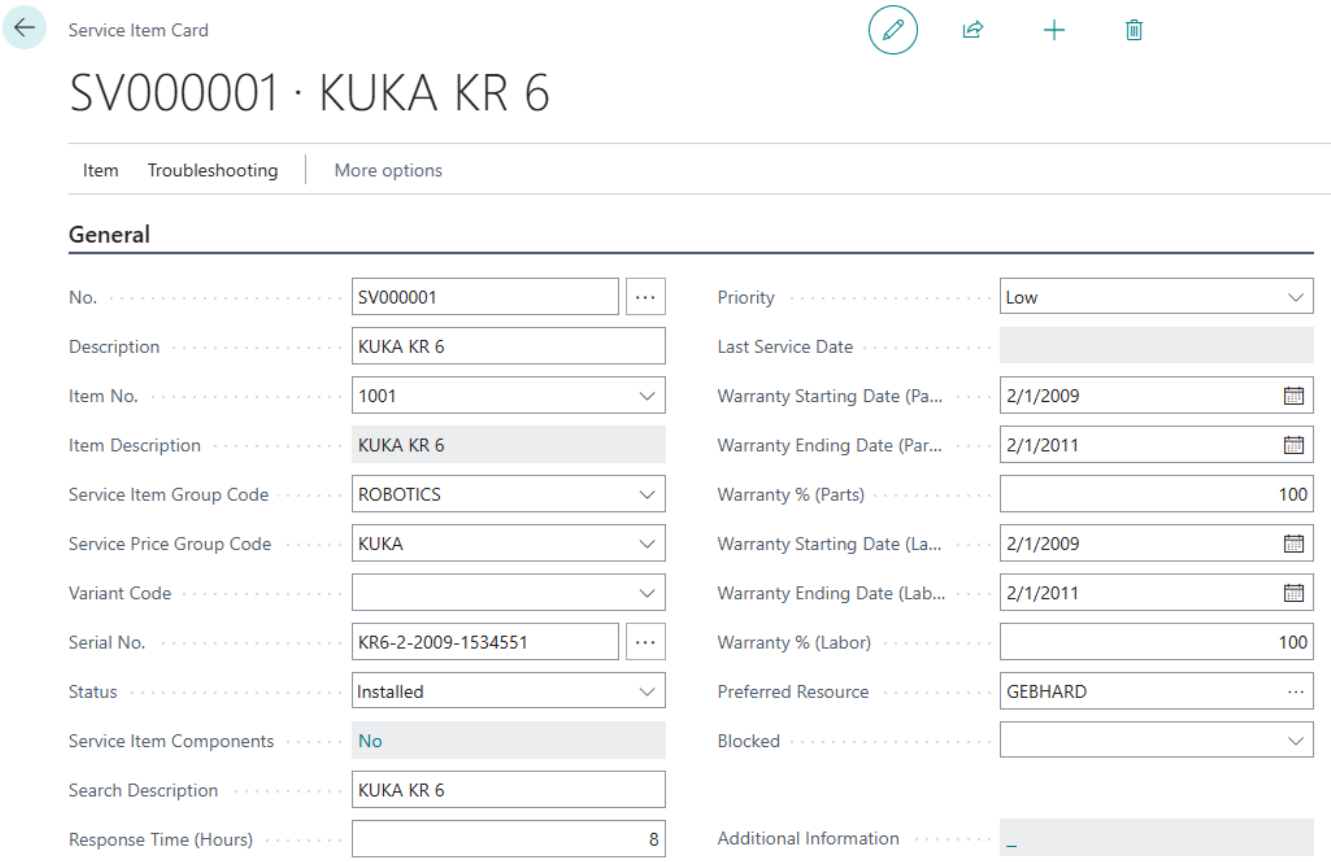
This chapter describes how to add additional information for a service item.

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 additonal information are stored.

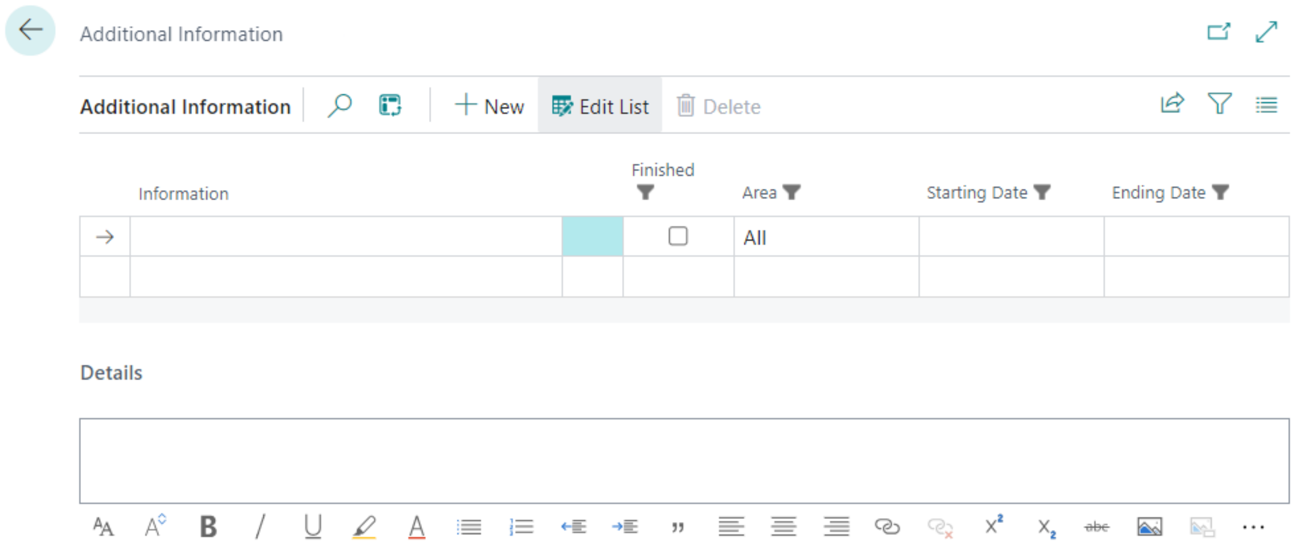
To add additional information for a service item, proceed as follows:

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.



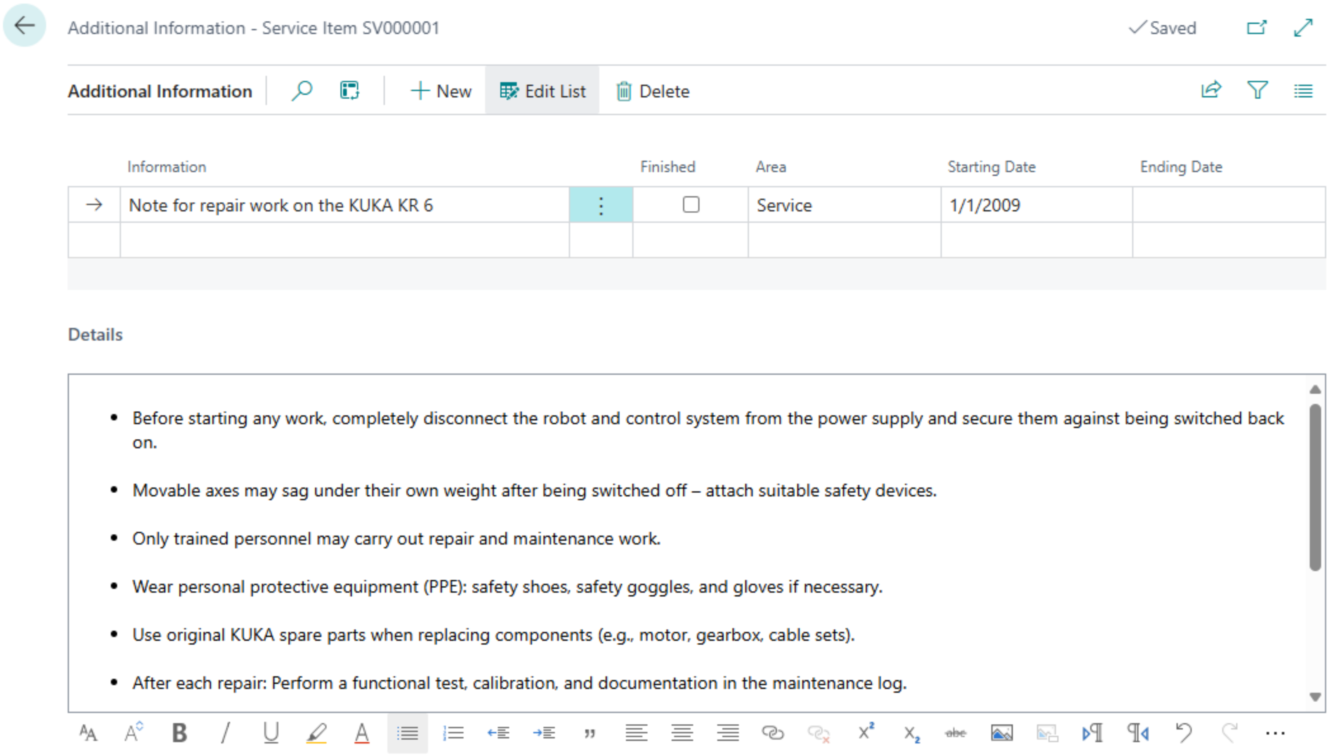
5. Click on **Item** > **Additional Information** in the menu bar.
6. The **Additional Information** page is displayed.



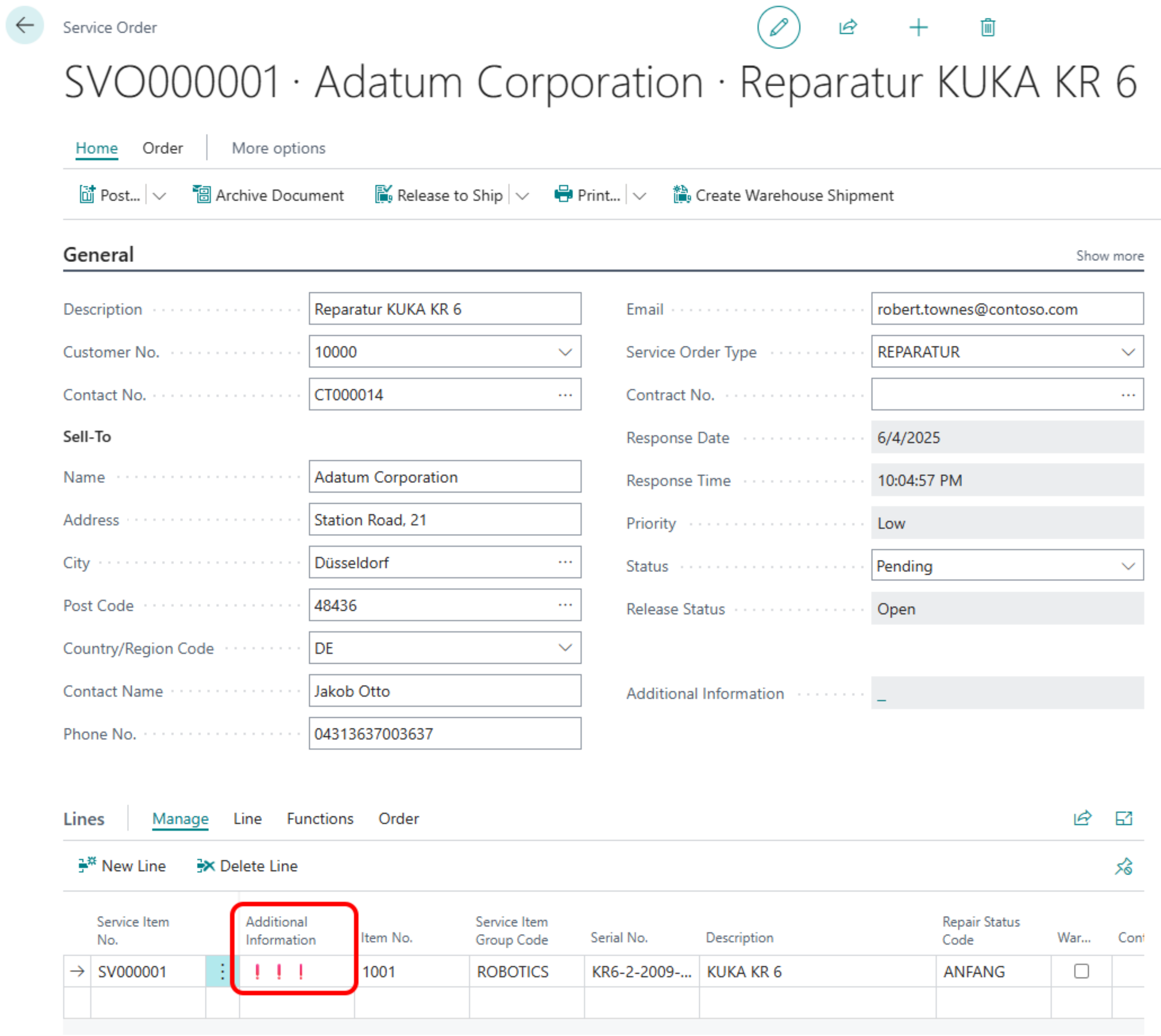
7. To create a new additional information, click on the **New** option in the menu bar.
8. Enter a description for the additional information in the **Information** column.
9. Use the checkbox under the **Completed** column to control whether this additional information text is active. If you activate the checkbox, no symbol indicating an additional information will be 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:

Icon	Description
	**Font**: Click on this icon to change the font of the text.
	**Font Size**: Click on this icon to change the size of the font.
	**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.
	**Font Style Underlined**: Click on this icon to change the font style between underlined or normal font style.
	**Background Color**: Click on this icon to define the color behind the font.
	**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.

Icon	Description
	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.
	Delete Link: Click on this icon to remove the selected link in the text.
	Superscript: Click on this icon to format the selected text as superscript.
	Subscript: Click on this icon to format the selected text as subscript.
	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).
	Text Direction From Left To Right: Click on this icon to format the selected text from left to right.
	Text Direction From Right To Left: Click on this icon to format the selected text from right to left.
	Revert Changes: Click on this icon to undo your changes to the text.
	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.



You have created an additional information for a service item. The **All** setting under the **Area** column means that the additonal 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.



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

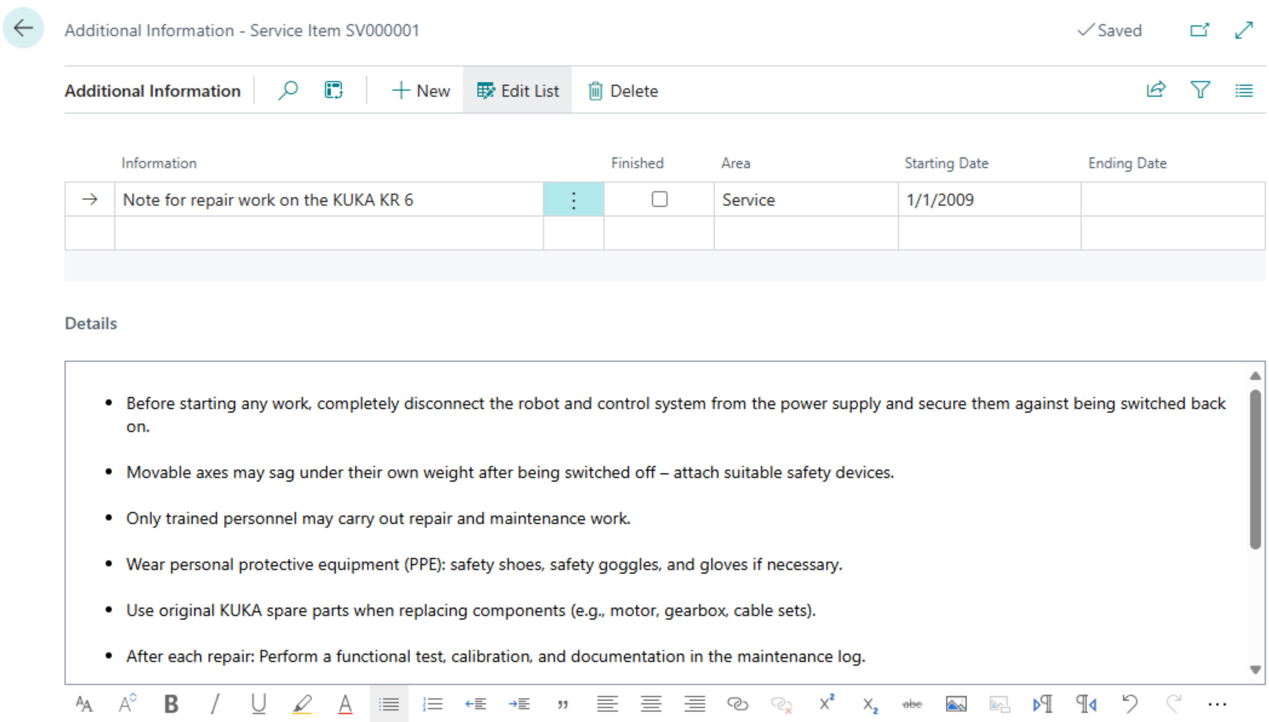
Continue with the chapter Mark Additional Information as completed

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.



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**.