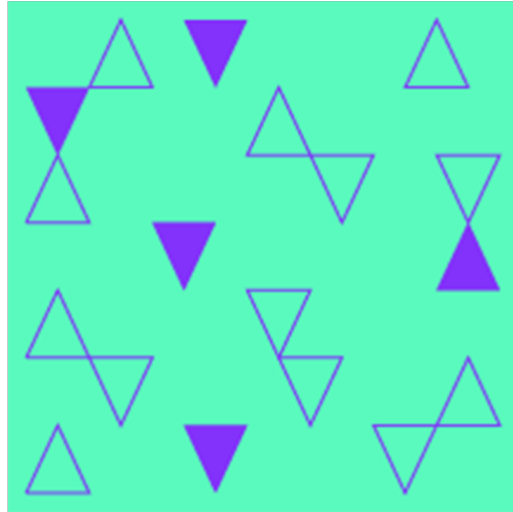
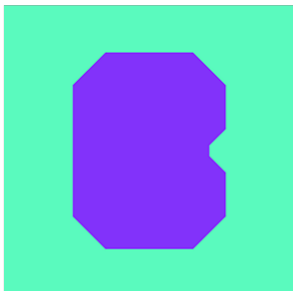




BEYOND

Attributes Core



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Preface

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

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

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Manufacturer

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VISIT
APPSOURCE

Version history

Version	Date	Author	Comment
1.0	27.03.2023	Jannic Weidel	Initial Version of the Documentation
1.1	10.05.2023	Jannic Weidel	Added Chapter for assigning permission sets
1.2	04.09.2023	Jannic Weidel	Added new screenshots
1.3	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 Attributes Core is an extension for Microsoft Dynamics 365 Business Central.

Beyond Attributes Core is used to store and maintain additional data on service items, items and fixed assets. After installation, an area is added to the corresponding lists and the cards in the info box, where you can enter characteristics and additional data (hereinafter referred to as attributes).

The latest version of this documentation can be found at the following link: [Beyond Attributes Core Documentation](#).

The examples described in this documentation represent only a part of the possibilities that the **Beyond Attributes Core** solution offers you.

If you have a specific case that you would like to map via the solution, please feel free to contact us.

NOTE

Dependencies on or to other apps

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

- [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 Attributes Core**.

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

Beyond License Management

Tenant ID									
Tenant Domain Name									
Licenses Sync License									
Company Name	Application Name	Status	Start Date	Expiry Date	Trial	Licensed Metric	Current Metric		
→	BeyondCalculation	Valid	23.08.2024 08:50	22.09.2030 08:50	☐	1	0		
	BeyondServiceRequestion	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		
	BeyondInventoryDetails	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	14.06.2024 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.

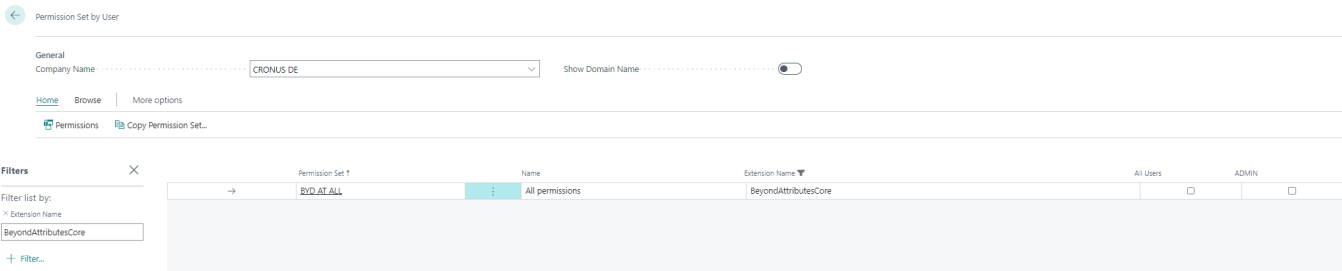
Assign User Permissions

The following description shows how to assign user permissions for the **Beyond Attributes Core** extension. The permission sets provided are:

Permission Set	Description
BYD AT ALL	This permission set enables the use of the Beyond Attributes Core extension.

To assign the permission set for **Beyond Attributes Core** 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 Attributes Core** as filter criteria.
8. The list is filtered to the permission sets of **Beyond Attributes Core**.
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 Attributes Core** 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 Attribute

This chapter describes how to create an attribute to record or manage additional data of a service item. Thanks to the 7 different attribute types, you can maintain a wide range of information about service items. Click on the data type to quickly navigate to the description.

Attribute Type	Description
Option	The Option attribute type is used to create an attribute that provides a fixed choice of attribute values. For example, you can define this attribute type to specify the service item color and preset the attribute values Blue , Black , or Yellow . You can subsequently add additional option values for this attribute. For more information on how to add values to an attribute of the option data type, see the Create Option Attribute section.
Text	The Text attribute type is used to create an attribute that allows a text to be entered as a value. For example, this can be the manufacturer of a vehicle or machine.
Integer	The attribute type Integer is used to create an attribute that is stored with an integer value. This can be, for example, the status of the operating hours counter or the odometer reading of the vehicle.
Decimal	The attribute type Decimal is used to create an attribute that is stored with a decimal value. For example, you can store filling quantities (e.g. oil quantities) of the service item (the vehicle or machine).
Date	The attribute type Date is used to create an attribute that is stored with a date value. This can be, for example, the year of manufacture of the machine or the first registration of the vehicle.
Blob	The Blob attribute type is used when large amounts of data are to be stored. For example, you can use this attribute type to store a long descriptive text.

Create Option Attribute

To create an attribute of the **Option** type, proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Attribute** and click on the corresponding search result.
3. The **Attributes** page is displayed. On this page you will find all the configured attributes.
4. To create a new attribute, click **New** in the menu bar.
5. A new window is displayed.



✓ Saved



Attribute

Actions ▾ Automate ▾

Name		Values	
Type	Option		
Blocked	☐		
Mandatory	☐		
Sorting No.			
Not Editable in Servic... ..	☐		

Activate on Entity

Manage



Related Entity Name

→		

6. Enter a name for the attribute in the **Name** input field.
7. In the **Type** field, define the **Option** data type.
8. To create the available selection values for the attribute, click in the **Values** field.
9. Click **New** in the menu bar to create a selectable option for the attribute. Return to the **Attribute** page when you have added all the options.
10. The **Blocked** slider is used to prevent the attribute from being used (for example, if the attribute values are not yet or no longer complete).
11. Activate the **Mandatory** slider if you want to set that the data for this attribute must be filled on the service item.
12. In the **Sorting No.** input field, specify a value for the sorting order of the attribute. You can specify positive and negative numbers in this field.
13. Activate the **Not editable in ServiceApp** to restrict users of the ServiceApp to change values of the attribute.
14. Under the **Activate on Entity** section, you can assign the created attribute to an entity. You can assign the attribute to items, assets and service items. Depending on which assignment you have made, the attribute is displayed in the attribute area in the info box area.

Select Entity



Object Caption

Item

Fixed Asset



Service Item



Sorting Order

You have created an attribute. If your colleagues use the web client in different display languages, you can store translations for the attributes and attribute values. For more information on how to add the translations for attributes and attribute values, see the [Add translations](#) chapter.

Create Text Attribute

To create an attribute of type **Text**, proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Attribute** and click on the corresponding search result.
3. The **Attributes** page is displayed. On this page you will find all the configured attributes.
4. To create a new attribute, click **New** in the menu bar.
5. A new window is displayed.

←

✓ Saved

Attribute

Actions ▾Automate ▾

Name

Type

Text ▾

Blocked

Mandatory

Sorting No.

Not Editable in ServiceApp

Activate on Entity

Manage

Related Entity Name

→

-

6. Enter a name for the attribute in the **Name** input field.
7. Define the data type **Text** in the **Type** field. The **Blocked** slider is used to prevent the attribute from being used (for example, if the attribute values are not yet complete or are no longer complete).
8. Activate the **Mandatory** slider if you want to set that the data for this attribute must be filled on the service item.
9. In the **Sorting No.** input field, specify a value for the sorting order of the attribute. You can specify positive and negative numbers in this field.
10. Activate the **Not editable in ServiceApp** to restrict users of the ServiceApp to change values of the attribute.
11. Under the **Activate on Entity** section, you can assign the created attribute to an entity. You can assign the attribute

to items, assets and service items. Depending on which assignment you have made, the attribute is displayed in the attribute area in the info box area.

Select Entity | 🔍 ▾ ...



Object Caption	
	Item
	Fixed Asset
→	<u>Service Item</u> ⋮

NOTE

Sorting Order

The sorting order of the displayed attributes in the service item factbox depends on the specified number values in the **Sorting No.** field. For example, a negative value (e.g. **-1**) ensures that the attribute is displayed before all other attributes with positive sort order. For more information on sort order, see the [Change Sorting Order for Attributes](#) chapter.

You have created an attribute. If your colleagues use the web client in different display languages, you can store translations for the attributes and attribute values. For more information on how to add the translations for attributes and attribute values, see the [Add translations](#) chapter.

Create Integer Attribute

To create an attribute of type **Integer**, proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Attribute** and click on the corresponding search result.
3. The **Attributes** page is displayed. On this page you will find all the configured attributes.
4. To create a new attribute, click **New** in the menu bar.
5. A new window is displayed.



✓ Saved



Attribute

Actions ▾ Automate ▾

Name	
Type	Integer
Blocked	☐
Mandatory	☐
Sorting No.	
Not Editable in ServiceApp	☐

Activate on Entity

Manage



Related Entity Name

→	-	

6. Enter a name for the attribute in the **Name** input field.
7. Define the data type **Integer** in the **Type** field. The **Blocked** slider is used to prevent the attribute from being used (for example, if the attribute values are not yet complete or are no longer complete).
8. Activate the **Mandatory** slider if you want to set that the data for this attribute must be filled on the service item.
9. In the **Sorting No.** input field, specify a value for the sorting order of the attribute. You can specify positive and negative numbers in this field.
10. Activate the **Not editable in ServiceApp** to restrict users of the ServiceApp to change values of the attribute.
11. Under the **Activate on Entity** section, you can assign the created attribute to an entity. You can assign the attribute to items, assets and service items. Depending on which assignment you have made, the attribute is displayed in the attribute area in the info box area.

Select Entity



Object Caption

Item

Fixed Asset



Service Item



NOTE

Sorting Order

The sorting order of the displayed attributes in the service item factbox depends on the specified number values in the **Sorting No.** field. For example, a negative value (e.g. **-1**) ensures that the attribute is displayed before all other attributes with positive sort order. For more information on sort order, see the [Change Sorting Order for Attributes](#) chapter.

You have created an attribute. If your colleagues use the web client in different display languages, you can store translations for the attributes and attribute values. For more information on how to add the translations for attributes

and attribute values, see the [Add translations](#) chapter.

Create Decimal Attribute

To create an attribute of the **Decimal** (decimal number) type, proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Attribute** and click on the corresponding search result.
3. The **Attributes** page is displayed. On this page you will find all the configured attributes.
4. To create a new attribute, click **New** in the menu bar.
5. A new window is displayed.

←

✓ Saved

Attribute

Actions ▾ Automate ▾

Name

Type

Decimal ▾

Blocked

Mandatory

Sorting No.

Not Editable in ServiceApp

Activate on Entity

Manage

Related Entity Name

→

—

6. Enter a name for the attribute in the **Name** input field.
7. Define the data type **Decimal** in the **Type** field. The **Blocked** slider is used to prevent the attribute from being used (for example, if the attribute values are not yet complete or are no longer complete).
8. Activate the **Mandatory** slider if you want to set that the data for this attribute must be filled on the service item.
9. In the **Sorting No.** input field, specify a value for the sorting order of the attribute. You can specify positive and negative numbers in this field.
10. Activate the **Not editable in ServiceApp** to restrict users of the ServiceApp to change values of the attribute.
11. Under the **Activate on Entity** section, you can assign the created attribute to an entity. You can assign the attribute to items, assets and service items. Depending on which assignment you have made, the attribute is displayed in the attribute area in the info box area.

Object Caption	
	Item
	Fixed Asset
→	Service Item

NOTE**Sorting Order**

The sorting order of the displayed attributes in the service item factbox depends on the specified number values in the **Sorting No.** field. For example, a negative value (e.g. **-1**) ensures that the attribute is displayed before all other attributes with positive sort order. For more information on sort order, see the [Change Sorting Order for Attributes](#) chapter.

You have created an attribute. If your colleagues use the web client in different display languages, you can store translations for the attributes and attribute values. For more information on how to add the translations for attributes and attribute values, see the [Add translations](#) chapter.

Create Date Attribute

To create an attribute of the **Date** type, proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Attribute** and click on the corresponding search result.
3. The **Attributes** page is displayed. On this page you will find all the configured attributes.
4. To create a new attribute, click **New** in the menu bar.
5. A new window is displayed.



✓ Saved



Attribute

Actions ▾ Automate ▾

Name	
Type	Date ▾
Blocked	☒
Mandatory	☒
Sorting No.	
Not Editable in ServiceApp	☒

Activate on Entity

Manage



Related Entity Name

→	-	

6. Enter a name for the attribute in the **Name** input field.
7. Define the data type **Date** in the **Type** field. The **Blocked** slider is used to prevent the attribute from being used (for example, if the attribute values are not yet complete or are no longer complete).
8. Activate the **Mandatory** slider if you want to set that the data for this attribute must be filled on the service item.
9. In the **Sorting No.** input field, specify a value for the sorting order of the attribute. You can specify positive and negative numbers in this field.
10. Activate the **Not editable in ServiceApp** to restrict users of the ServiceApp to change values of the attribute.
11. Under the **Activate on Entity** section, you can assign the created attribute to an entity. You can assign the attribute to items, assets and service items. Depending on which assignment you have made, the attribute is displayed in the attribute area in the info box area.

Select Entity



Object Caption

Item

Fixed Asset



Service Item



NOTE

Sorting Order

The sorting order of the displayed attributes in the service item factbox depends on the specified number values in the **Sorting No.** field. For example, a negative value (e.g. **-1**) ensures that the attribute is displayed before all other attributes with positive sort order. For more information on sort order, see the [Change Sorting Order for Attributes](#) chapter.

You have created an attribute. If your colleagues use the web client in different display languages, you can store

translations for the attributes and attribute values. For more information on how to add the translations for attributes and attribute values, see the [Add translations](#) chapter.

Create Blob Attribute

To create an attribute of type **Blob** (Binary Large Object), proceed as follows:

1. From the role center, open the search function (**ALT+Q**).
2. Search for **Attribute** and click on the corresponding search result.
3. The **Attributes** page is displayed. On this page you will find all the configured attributes.
4. To create a new attribute, click **New** in the menu bar.
5. A new window is displayed.

✓ Saved

Attribute

Actions ▾ Automate ▾

Name

Type

Blocked

Mandatory

Sorting No.

Not Editable in ServiceApp

Activate on Entity | Manage

Related Entity Name

→	-	

6. Enter a name for the attribute in the **Name** input field.
7. Define the data type **Blob** in the **Type** field. The **Blocked** slider is used to prevent the attribute from being used (for example, if the attribute values are not yet or no longer complete).
8. Activate the **Mandatory** slider if you want to set that the data for this attribute must be filled on the service item.
9. In the **Sorting No.** input field, specify a value for the sorting order of the attribute. You can specify positive and negative numbers in this field.
10. Activate the **Not editable in ServiceApp** to restrict users of the ServiceApp to change values of the attribute.
11. Under the **Activate on Entity** section, you can assign the created attribute to an entity. You can assign the attribute to items, assets and service items. Depending on which assignment you have made, the attribute is displayed in the attribute area in the info box area.

Object Caption	
	Item
	Fixed Asset
→	<u>Service Item</u> ⋮

NOTE**Sorting Order**

The sorting order of the displayed attributes in the service item factbox depends on the specified number values in the **Sorting No.** field. For example, a negative value (e.g. **-1**) ensures that the attribute is displayed before all other attributes with positive sort order. For more information on sort order, see the [Change Sorting Order for Attributes](#) chapter.

You have created an attribute. If your colleagues use the web client in different display languages, you can store translations for the attributes and attribute values. For more information on how to add the translations for attributes and attribute values, see the [Add translations](#) chapter.

Add Translations

This chapter describes how to add translations to enable the use of attributes when different display languages are used.

You can add translations for attribute names and the selectable options for attributes of the **Option** data type.

Add Translation for an Attribute

This section describes how to add a translation for an attribute.

Proceed as follows to add a translation for an attribute:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Attributes** and click on the corresponding search result.
3. The **Attributes** list is displayed. In this list you will find all attributes.

←

Attributes

🔖

📄

🔗

🔍

Search

+

New

📄

Edit List

🗑️

Delete

✏️

Edit

👁️

View

📄

Values

📄

Translations

⋮

🔗

🔍

☰

Name	Type	Values	Bloc...	Man...	Sorting No.
→ Processor	⋮ Text	—	☐	☐	1
Installed RAM	Text	—	☐	☐	5
Product ID	Text	—	☐	☐	10
Device ID	Text	—	☐	☐	15
Hard Disc Capacity C:	Text	—	☐	☐	20
Hard Disc Capacity D:	Text	—	☐	☐	25

4. To add a translation to the attribute, select the attribute in the list and click **Translations** in the menu bar.
5. Under the **Language Code** column, enter the code of the language for which you want to enter the translation (for example, **DEU** for German or **ENU** for English).
6. Under the **Name** column, enter the translation for the attribute in the specified language.

You have added a translation for the name of an attribute. If you change the display language, the translation you specified will be used. For attributes of the **Option** data type, it is also possible to store translations for the selectable option values. For more information about this, see the following section [Add translation for an Attribute Value](#).

Add translation for an Attribute Value

This section describes how to add a translation for an option value of an attribute.

To add a translation for an option value of an attribute, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Attributes** and click on the corresponding search result.
3. The **Attributes** list is displayed. In this list you will find all attributes.

4. To store a translation for one or more attribute values, click on the selectable options of the attribute in the list under the **Values** column.
5. The selectable options for the attribute are displayed. Select the option for which you want to add a translation.
6. Click **Actions > Process > Translations** in the menu bar.
7. A new list is displayed.

- Under the **Language Code** column, enter the code of the language for which you want to enter the translation (for example, **DEU** for German or **ENU** for English).
- Under the **Name** column, enter the translation for the option value.

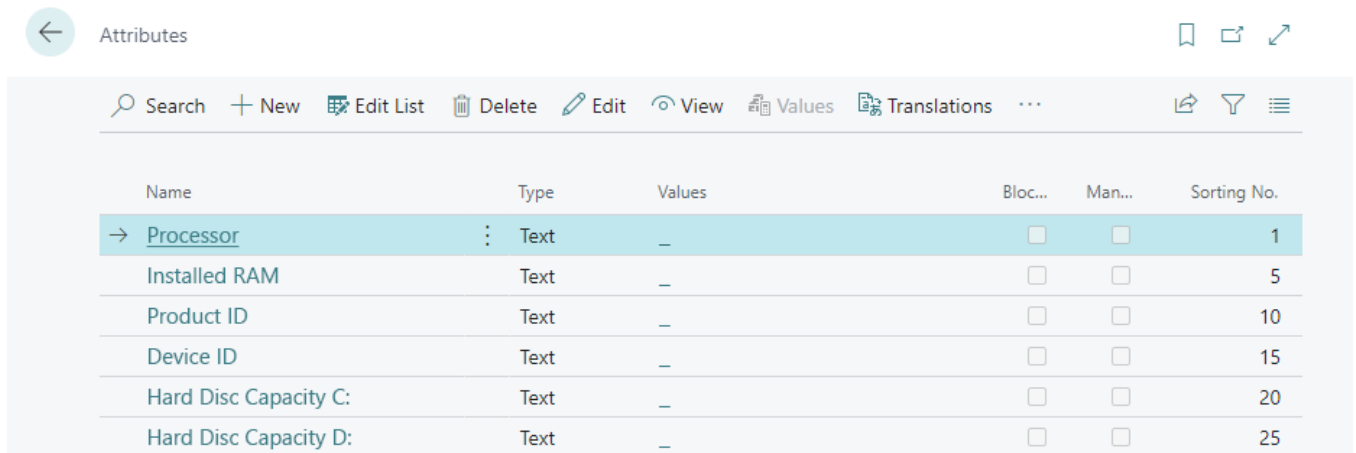
You have saved a translation for a selectable value of an option attribute. When you change the display language, the translation is applied to the option name.

Change Sorting Order for Attributes

This chapter describes how to change the sorting order for displaying attributes. The order in which attributes are displayed depends on the value under the **Sorting No.** field.

To change the sorting order of the attributes, proceed as follows:

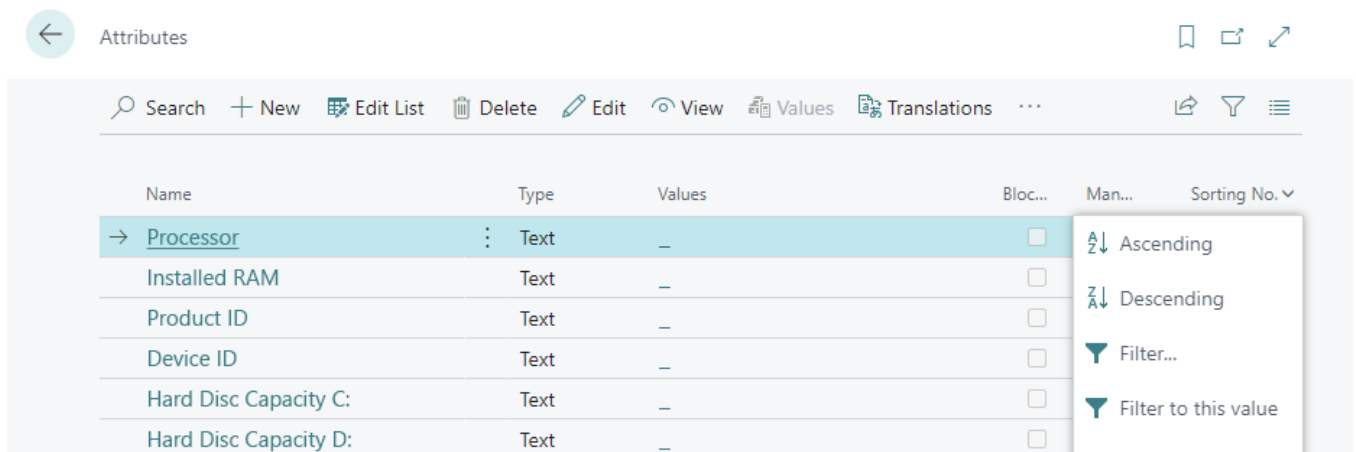
1. Open the search function from the role center (**ALT+Q**).
2. Search for **Attributes** and click on the corresponding search result.
3. The **Attributes** page is displayed. On this page you will find all configured attributes.



The screenshot shows the 'Attributes' page in a software interface. At the top, there is a search bar and several action buttons: '+ New', 'Edit List', 'Delete', 'Edit', 'View', 'Values', 'Translations', and a menu icon. Below the buttons is a table with the following columns: 'Name', 'Type', 'Values', 'Bloc...', 'Man...', and 'Sorting No.'. The table contains six rows of attributes. The first row, 'Processor', is highlighted in light blue and has a 'Sorting No.' of 1. The other rows have 'Sorting No.' values of 5, 10, 15, 20, and 25 respectively.

Name	Type	Values	Bloc...	Man...	Sorting No.
→ Processor	Text	—	☐	☐	1
Installed RAM	Text	—	☐	☐	5
Product ID	Text	—	☐	☐	10
Device ID	Text	—	☐	☐	15
Hard Disc Capacity C:	Text	—	☐	☐	20
Hard Disc Capacity D:	Text	—	☐	☐	25

4. To get an overview of which attribute is displayed first based on the order in the display, sort the **Sort** column in ascending order. To do this, click on the column header and select **Ascending** from the context menu.



The screenshot shows the 'Attributes' page with the 'Sorting No.' column header menu open. The menu is located at the bottom right of the table and contains the following options: 'Ascending', 'Descending', 'Filter...', and 'Filter to this value'. The 'Ascending' option is selected, indicated by a blue highlight. The table data is the same as in the previous screenshot.

Name	Type	Values	Bloc...	Man...	Sorting No. ▾
→ Processor	Text	—	☐	☐	1
Installed RAM	Text	—	☐	☐	5
Product ID	Text	—	☐	☐	10
Device ID	Text	—	☐	☐	15
Hard Disc Capacity C:	Text	—	☐	☐	20
Hard Disc Capacity D:	Text	—	☐	☐	25

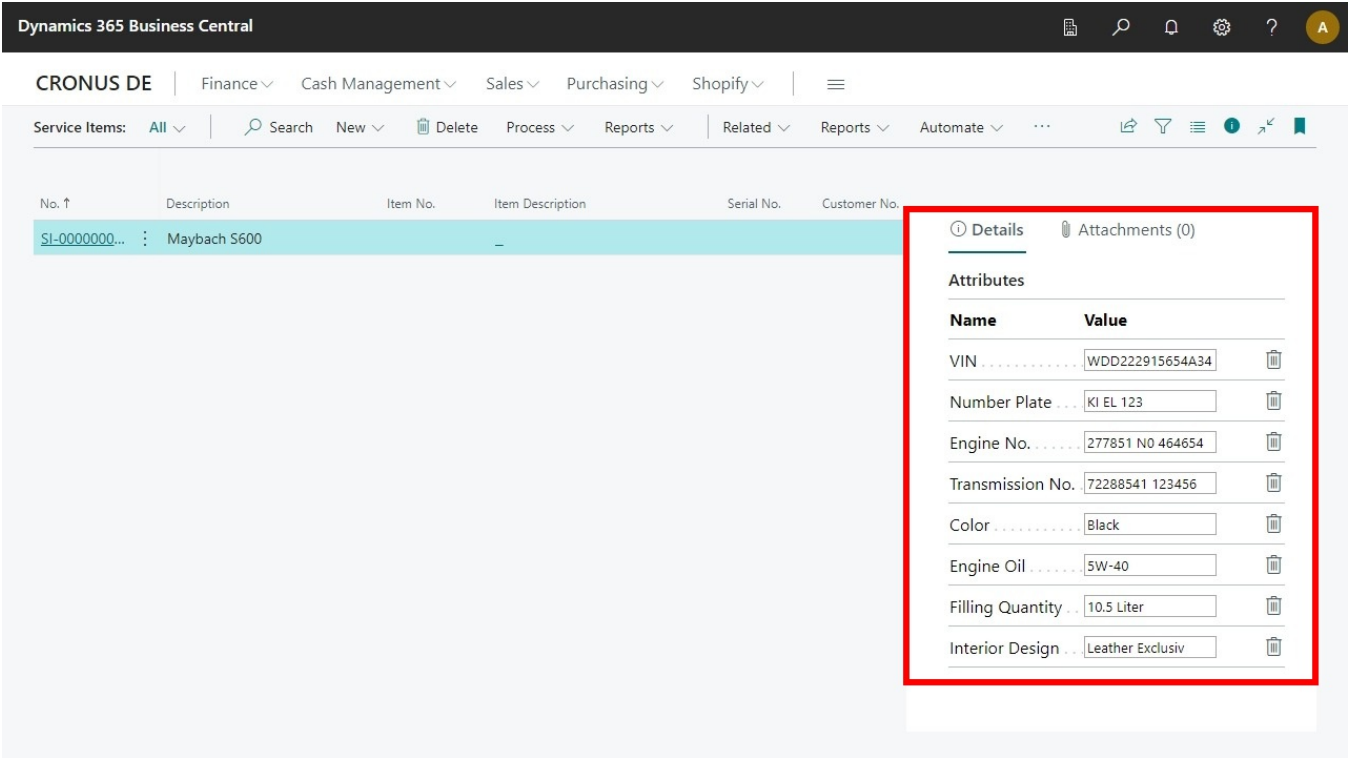
5. On the attribute card, adjust the value in the **Sorting No.** field for the attribute so that it appears at the desired position in the sequence. Note that negative values can also be used for the **Sorting No.** field.

You have changed the display order (**Sorting No.**) of the attributes.

Save Attributes on the Service Item

This chapter describes how to store additional information on the service item via an attribute.
To store a value for an attribute on the service item, do the following:

- 1. Open 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. In this list you will find all service items.
- 4. Display the factbox (**ALT+F2**). The factbox area will show you the attributes for the service item.



- 5. Enter a value in the attribute input field.

You have entered a value for an attribute on a service item.