BEYOND
REPORTSV2

User Guide

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Table of Contents

Preface

This documentation contains information on how to install and operate **Beyond ReportsV2** 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 ReportsV2**.

Read this documentation in full to set up **Beyond ReportsV2** 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 ReportsV2** and keep the documentation in a place that is accessible to your employees.

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Manufacturer

Beyond ReportsV2 is developed by:

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VISIT APPSOURCE

Version history

Version	Date	Autor	Comment
1.0	17.02.2025	Jannic Weidel	Initial (English) Version of the documentation
1.1	12.06.2025	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:

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 ReportsV2 is an extension for Microsoft Dynamics 365 Business Central.

Beyond ReportsV2 allows you to customize the documents with a header image, footer image and, if necessary, a watermark. Create your own digital stationery and generate your reports directly with it.

You can also design the content of the reports. In addition to the font and font size, you can also add additional fields to the report. Change the font style, add a signature field, define a new name for a field in the document, set whether item numbers should be printed or hidden and much more.

Beyond ReportsV2 supports the following reports and documents:

Purchase	Sales
Purchase Quote	Sales Quote
Purchase Order	Sales Order
Purchase Credit Memo	Sales Credit Memo
Purchase Return Order	Sales Return Order
Purchase Blanket Order	Sales Blanket Order
Purchase Return Shipment	Sales Shipment
Purchase Receipt	Sales Return Receipt
Purchase Invoice	Sales Invoice
Purchase Proforma Receipt	Sales Proforma Shipment
	Sales Proforma Invoice

Warehouse	Finance
Direct Transfer	Finance Charge Memo
Transfer Order	Issued Finance Charge Memo
Transfer Receipt	Issued Reminder
Transfer Shipment	Reminder
Posted Warehouse Receipt	
Posted Warehouse Shipment	
Warehouse Receipt	
Warehouse Shipment	

Optionally, you can create additional documents for the **Service** business area; this requires the **Beyond ReportsV2Service** bridge app. For more information on the range of functions **Beyond ReportsV2Service** offers you, please refer to the product-specific documentation. Click here to access the documentation for **Beyond ReportsV2Service**.

The latest version of this documentation can be found at the following link: Beyond ReportsV2 Documentation.

The examples described in this documentation represent only a part of the possibilities that the **Beyond ReportsV2** 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 from or to other apps

Additional, basic applications are required to use **Beyond ReportsV2**. The following applications are required to use **Beyond ReportsV2** and are automatically installed and licensed:

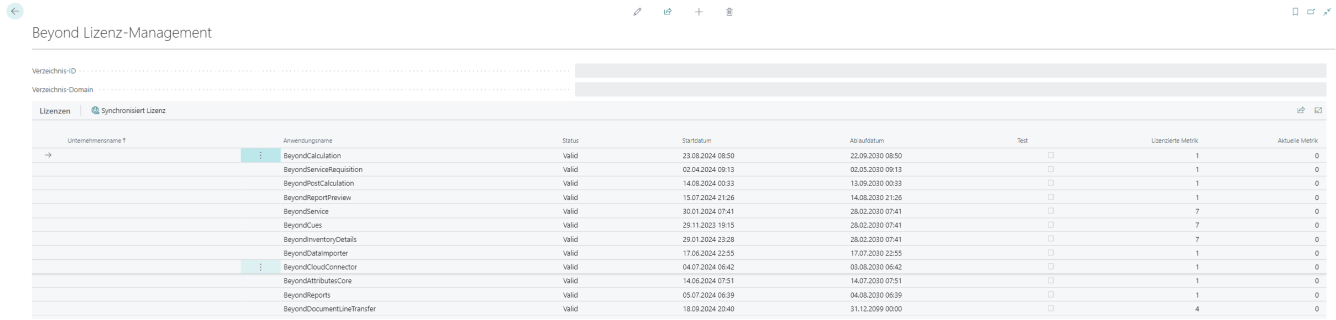
- Beyond License: Management of trial and full licenses for apps/add-ins from BeyondIT.
- Beyond Signature: App for digital signatures in reports, receipts and documents in Business Central.
- Beyond ReportPreview: App for viewing reports, receipts and documents in Business Central.

License Management

This chapter describes how you can view the license management of **Beyond Reportsv2**.

To view the status of the product license for **Beyond Reportsv2**, 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.

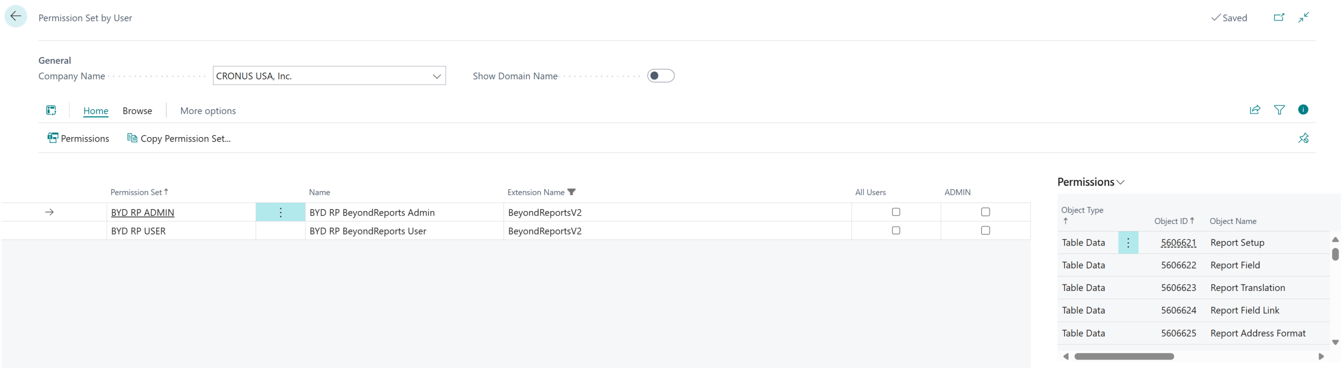
Assign User Permissions

The following description shows how to assign user permissions for the **BEYOND ReportsV2** extension. The permission sets provided are:

Permission Set	Description
BYD RP User	This authorization set enables the use of the **BeyondReportsV2** extension.
BYD RP ADMIN	This authorization set gives the assigned user administrative access to the **Beyond ReportsV2** extension and the associated setup.

To assign the permission set for **BEYOND ReportsV2** 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 **BeyondReportsV2** as filter criteria.
8. The list is filtered to the permission sets of **BeyondReportsV2**.
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.

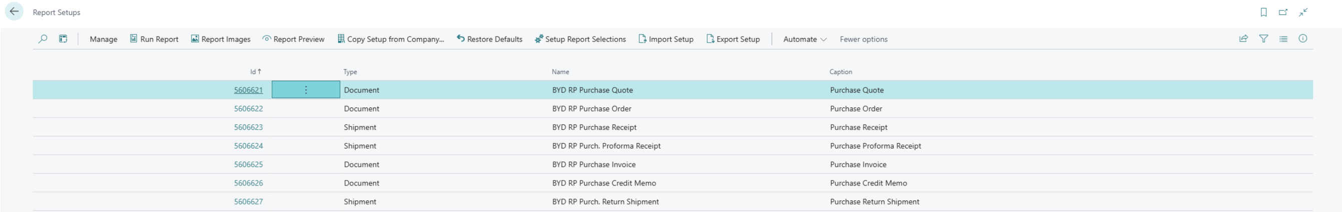
You have assigned a permission set for **BEYOND ReportsV2** to a user. Note that users with the **SUPER** permission set have all rights, i.e. you do not need to give this user any additional rights.

Activate Reports

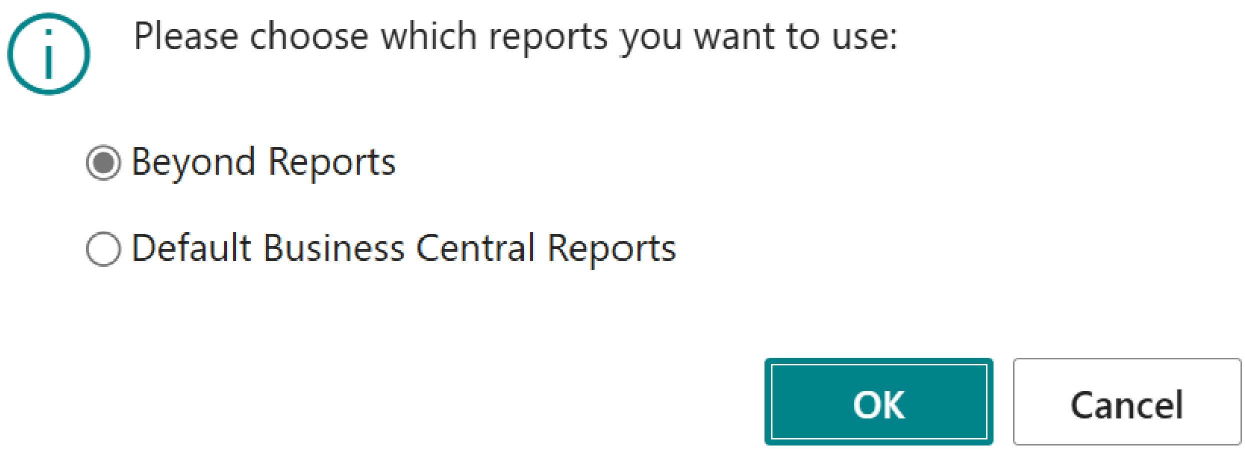
This chapter describes how to change the reports from the standard reports to **Beyond ReportsV2**.

To replace the standard reports in Business Central with the customizable reports from **Beyond ReportsV2**, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.



4. Click on the **Setup Report Selections** option in the menu bar.
5. A dialog box is displayed.



6. Activate the **Beyond Reports** option in the dialog window.
7. Confirm the selection. Click on the **OK** button.

You have activated the report templates of **Beyond ReportsV2** and use them in your Business Central.

Setup Header Image

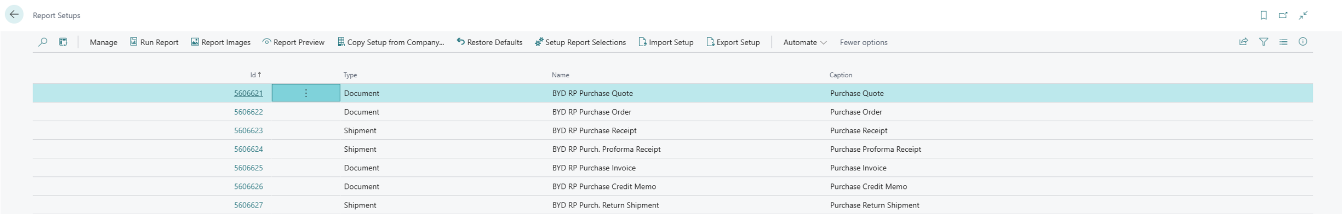
This chapter describes how you can set up a header image for your reports. Please note that the header image should ideally have the following dimensions:

	Length	Width	Format
Header Image:	2480 px	531 px	PNG

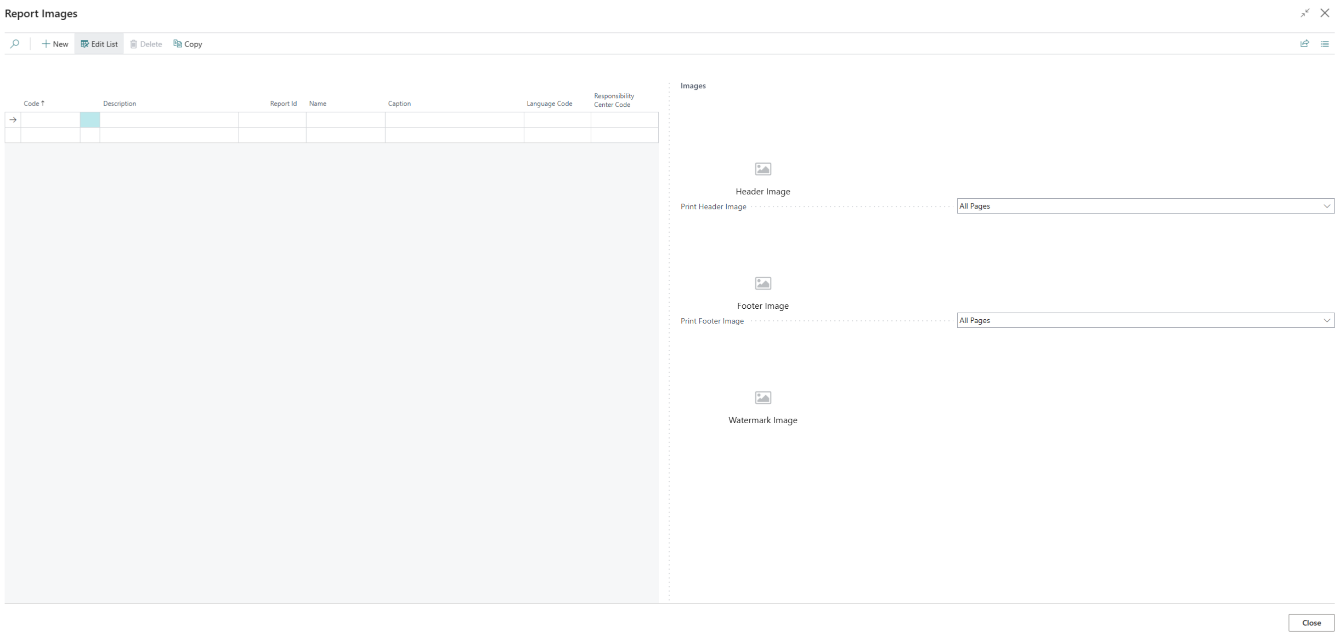
In the example header image, the transparent areas are checked with gray and white tiles. These areas are not printed.

To set up your header iamge for the reports, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.

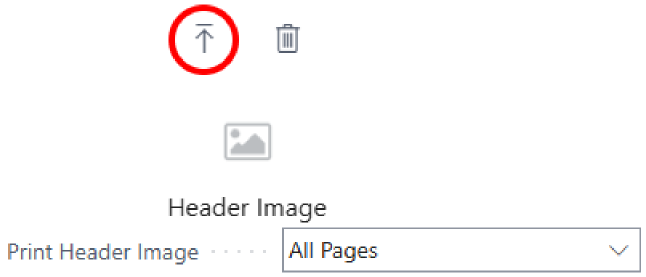


4. Click on the **Report Images** option in the menu bar.
5. The **Report Images** page is displayed.

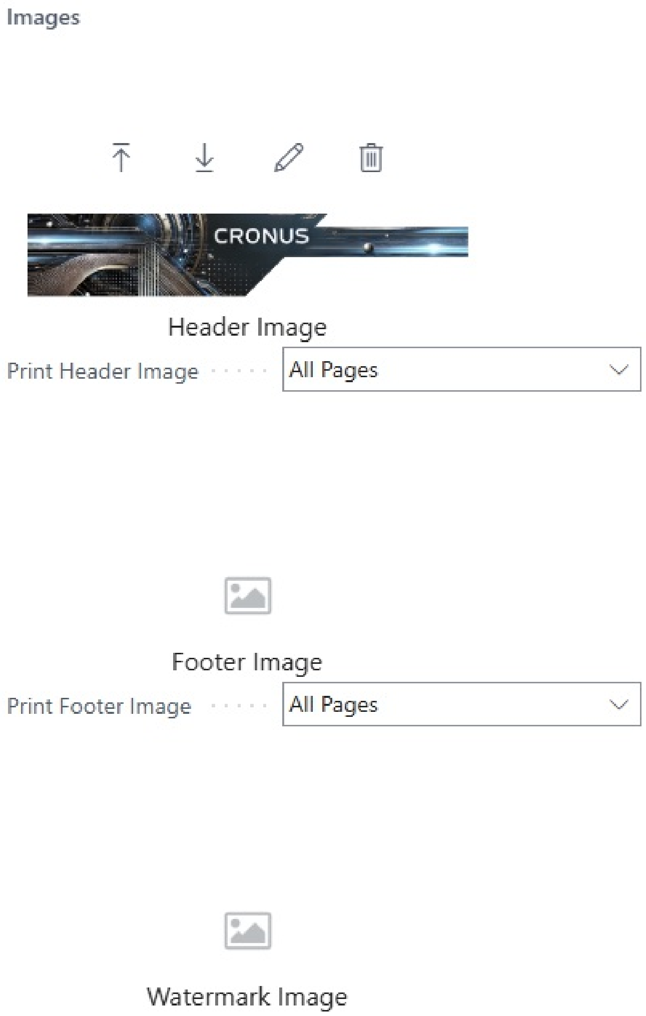


6. Enter a code for the new data record in the **Code** column on the left-hand side of the screen or select an existing data record.
7. Enter a description for the data record in the **Description** column. If you want to set up other images for a specific report, you can enter the ID of the corresponding report under the **Report ID** column. If no report ID is specified, the uploaded images will be used for all reports.

8. The values of the **Name** and **Caption** fields are updated.
9. Under the **Language Code** column, enter the code for the language that is used in the report and for which the images are set up.
10. Under the **Responsibility Center Code** column, enter the code of the responsibility center for which the report with the images is used.
11. Move the cursor to the icon for the header image on the right-hand side of the screen.



12. Click on the icon to upload the header image.
13. Enter the path for uploading the header image.
14. After uploading the header image, further options are available in the menu for the header image.



15. You have uploaded the header image. If you want to change the size of the image, click on the pencil icon.
16. The **Image Cropper** page is displayed.

17. To scale the header image to the desired size, scroll with the mouse wheel.
18. To move the header image sideways, click on the header image with the left mouse button and hold the mouse button down. Then move the header image into the frame.
19. Click on **Save** in the menu bar. The header image is saved.
20. On the **Report Images** page, you have the following options for setting the header image in the dropdown list below the header image:
    - **All Pages**: The header image is printed on all pages of the report.
    - **First Page**: The header image is only printed on the first page of the report.
    - **Last Page**: The header image is only printed on the last page of the report.

You have set up the header image.

Next Chapter

Setup Footer Image

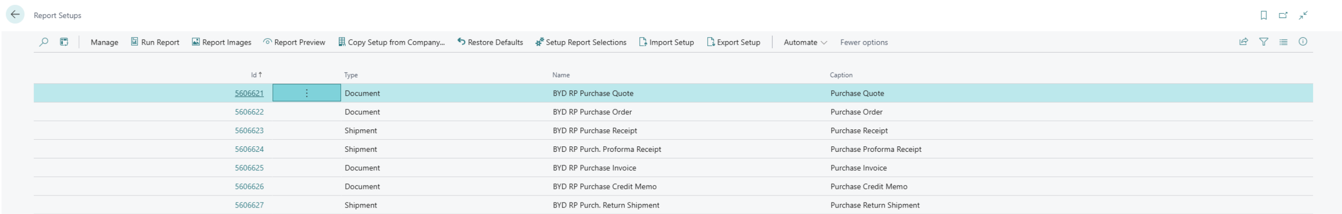
This chapter describes how you can set up a footer image for your reports. Please note that the image should ideally have the following dimensions:

	Length	Width	Format
Footer Image:	2480 px	531 px	PNG

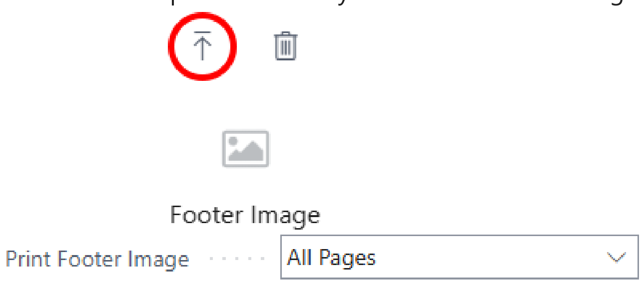
In the example footer image, the transparent areas are checked with gray and white tiles. These areas are not printed.

To set up your footer image for the reports, proceed as follows:

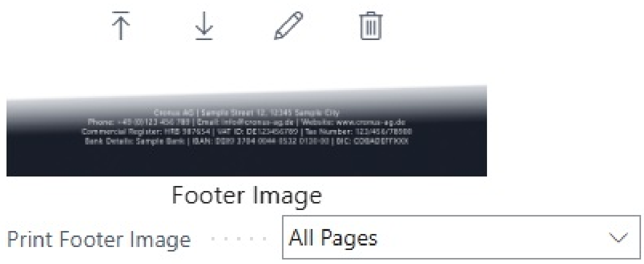
1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.



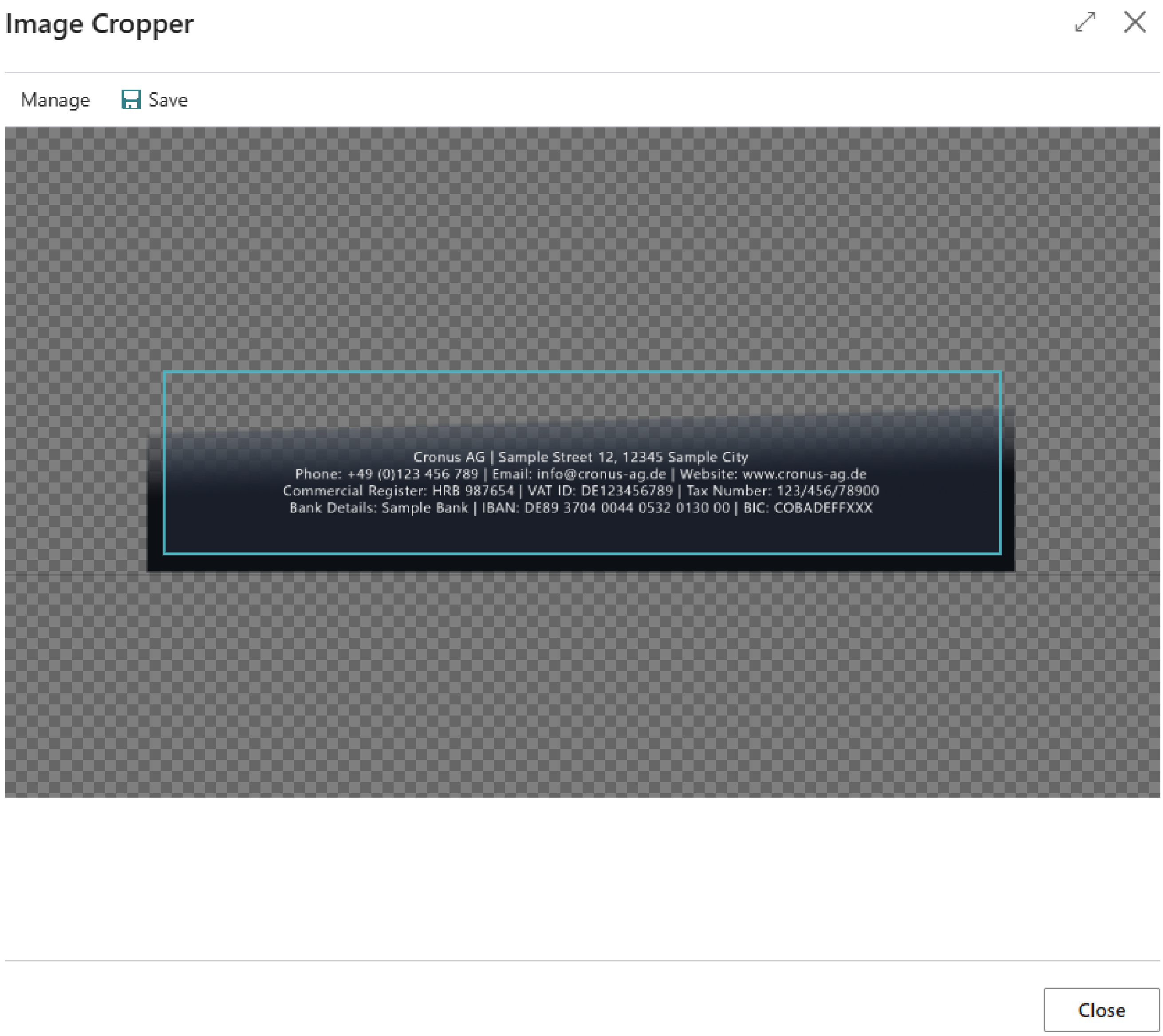
4. Click on the **Report Images** option in the menu bar.
5. The **Report Images** page is displayed.
6. Enter a code for the new data set in the **Code** column on the left-hand side of the screen. If you have already uploaded a header image as described in the chapter Setup Header Image, select the created data record to upload the footer image to this data record.
7. Move the mouse pointer to the symbol for the footer image on the right-hand side of the screen.



8. Click on the icon to upload the footer image.
9. Enter the path for uploading the image.
10. After uploading the footer image, further options are available in the menu for the image.



11. You have uploaded the footer image. If you want to change the size of the image, click on the pencil icon.
12. The **Image Cropper** page is displayed.



13. To scale the footer image to the desired size, scroll with the mouse wheel.
14. To move the footer image sideways, click on the footer image with the left mouse button and hold the mouse button down. Then move the footer image into the frame.
15. Click on **Save** in the menu bar. The footer image is saved.
16. On the **Report Images** page, you have the following options for setting the footer image in the dropdown list below the footer image:
    - **All Pages**: The footer image is printed on all pages of the report.
    - **First Page**: The footer image is only printed on the first page of the report.
    - **Last Page**: The footer image is only printed on the last page of the report.

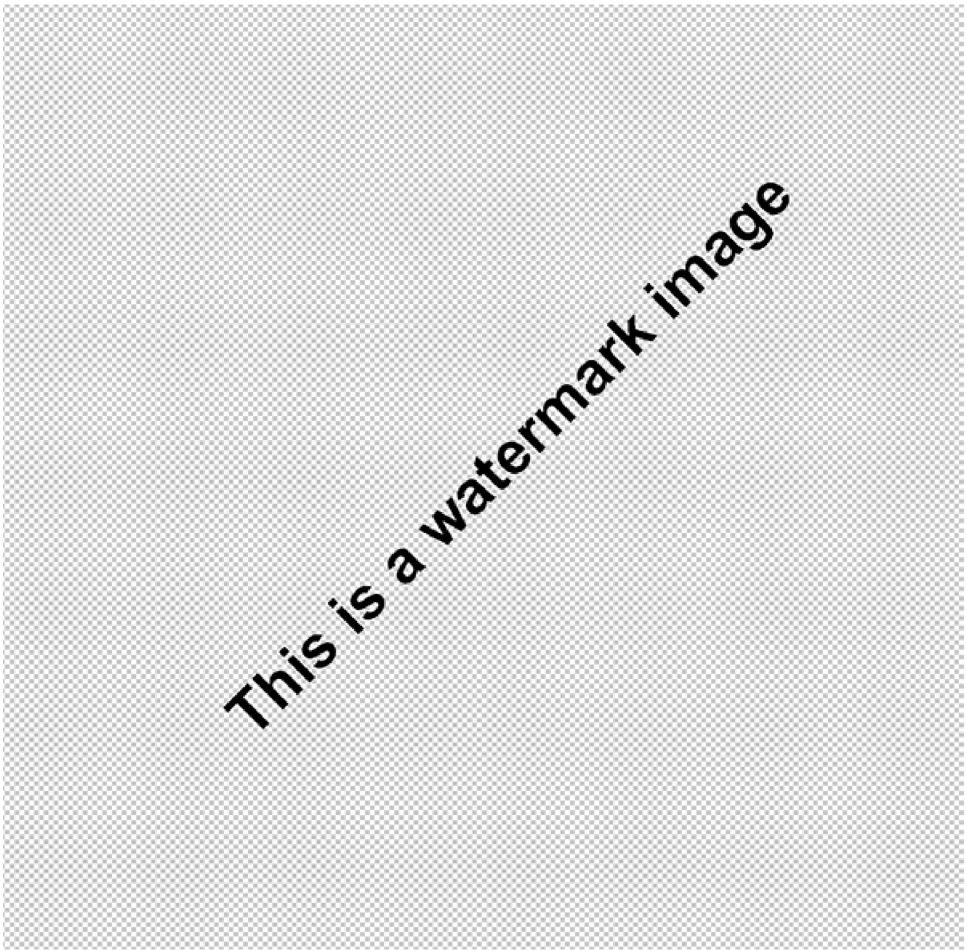
You have set up the footer image.

Next Chapter

Setup Watermark Image

This chapter describes how you can set up an image (watermark image) for your reports. Please note that the image should ideally have the following dimensions:

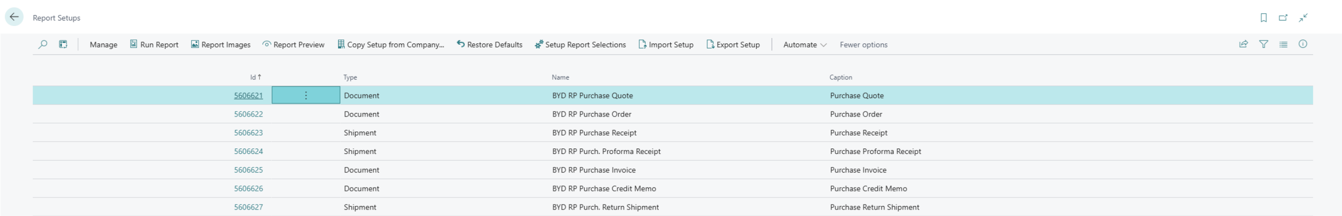
	Length	Width	Format
Watermark Image:	800 px	800 px	JPEG (Grey scale)



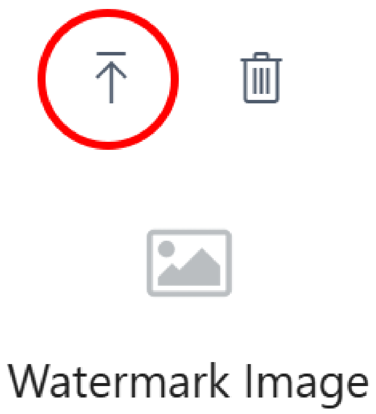
In the example image, the transparent areas are checked with gray and white tiles. These areas are not printed.

To set up your watermark image for the reports, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.



4. Click on the **Report Images** option in the menu bar.
5. The **Report Images** page is displayed.
6. Enter a code for the new data record in the **Code** column on the left-hand side of the screen. If you have already uploaded a Header Image or a Footer Image, select the created data set to upload the watermark image to this data set.
7. Move the cursor to the icon for the watermark image on the righthand side of the screen.



8. Click on the icon for uploading the watermark image.
9. Enter the path for uploading the image.

You have set up the watermark image.

Next Chapter

Setup Report

This chapter describes how to set up a report. **Beyond ReportsV2** offers you a wide range of content and layout options that you can use to design your reports.

> **NOTE**
>
> To customize reports quickly and easily, we recommend that you open the report preview (on the **Report Setups** page) in a separate browser window. If you change the report design, you can then track the change to the report at any time by clicking on the **Refresh** button.

> **NOTE**
>
> **Info**
> **Beyond ReportsV2** has been programmed to allow you to customize reports and report content without additional developer effort. You can reset these changes back to the default settings at any time. For more information, please refer to the chapter Reset Report Setup.

The contents of this chapter are divided into the following sections:

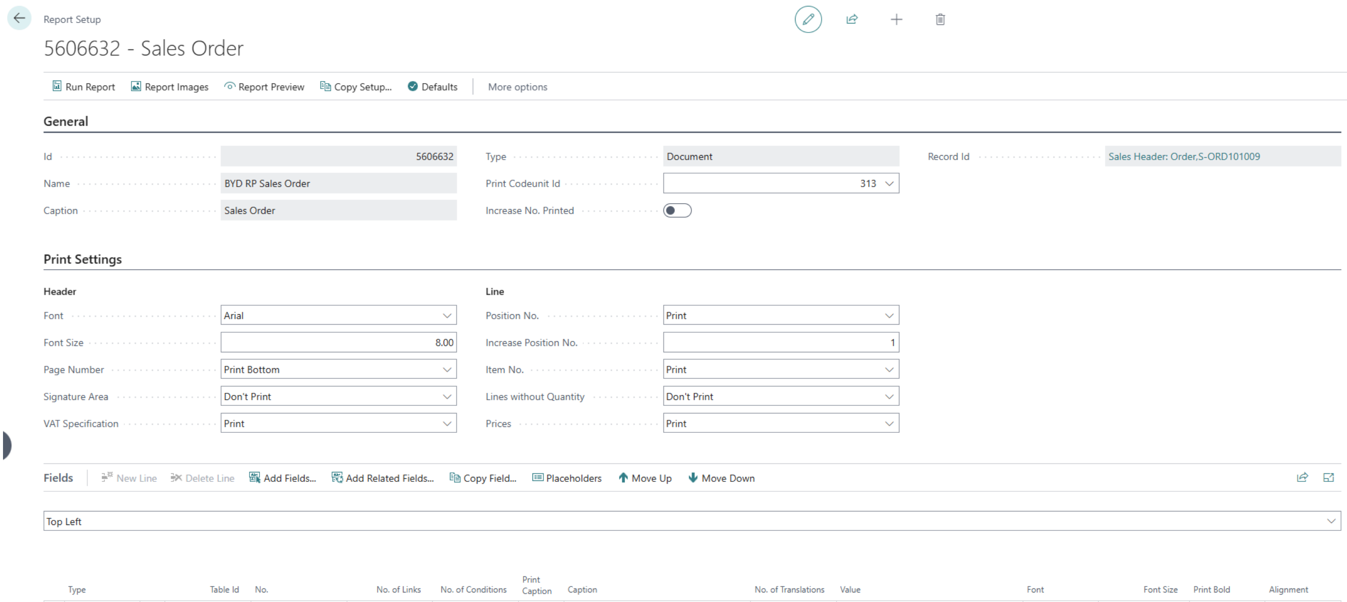
- Define Print Settings
- Edit Report Address Format
- Add Field to Report
- Add Related Field to Report
- Move Field in Report
- Edit Field Caption
- Add Translation for Field Caption
- Hide Field Caption
- Define Condition for Field
- Add Text Line to Report
- Add Placeholder to Text Line
- Add Translation for Text Line
- Add Seasonal Text to Report
- Add Rich Text to Report

Define Print Settings

This section describes how you can define the print settings for a report.

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

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select the relevant report from the list and click on the value under the **ID** column in the report line.
5. The report card is displayed.



6. Under the **Print Settings** tab, you can make the following print settings for the report header:
    - **Font**: In this field you define which font is to be used in the report.
    - **Font Size**: In this field you define the size of the font.
    - **Page Number**: In this field, you specify whether a page number should be printed in the report and if so, where it should be printed.
    - **Signature Area**: In this field, you specify whether a signature area should be printed in the report.
    - **VAT Specification**: In this field, you specify whether the VAT specification should be printed in the report.

7. Under the **Print Settings** tab, you can make the following print settings for the report lines:
    - **Position No.**: In this field, you specify whether position numbers are to be printed in the report.
    - **Increase Position No.**: In this field, you define how position numbers are to be incremented.
    - **Item No.**: In this field you specify whether item numbers are to be printed.
    - **Lines without Quantity**: In this field you specify whether item lines without quantity should be printed in the report.
    - **Prices**: In this field, you specify whether or not prices should be printed in the report. Activate this option, for example, if you do not want to communicate prices to the report recipient or if item prices are irrelevant for the report.

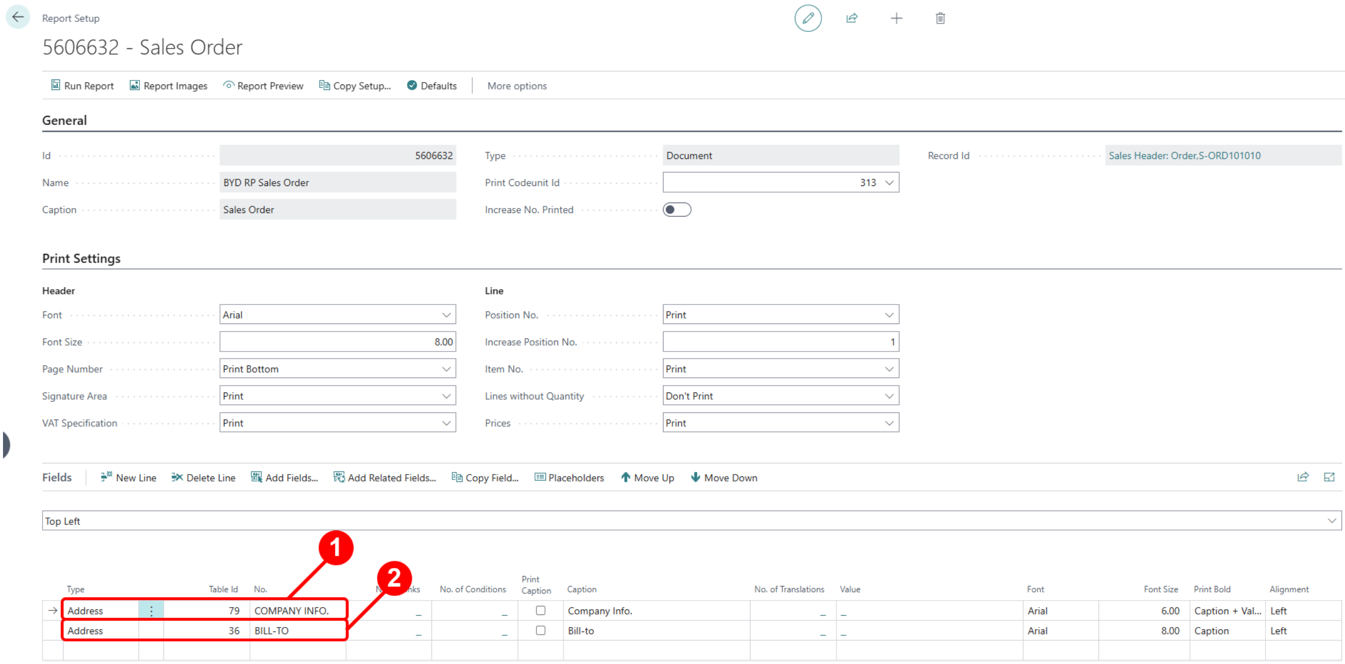
You have edited the print settings for the report. Please note that the font in particular can be overwritten by field-specific settings. For more information on fields in the report, see Add Field to Report.

Edit Report Address Format

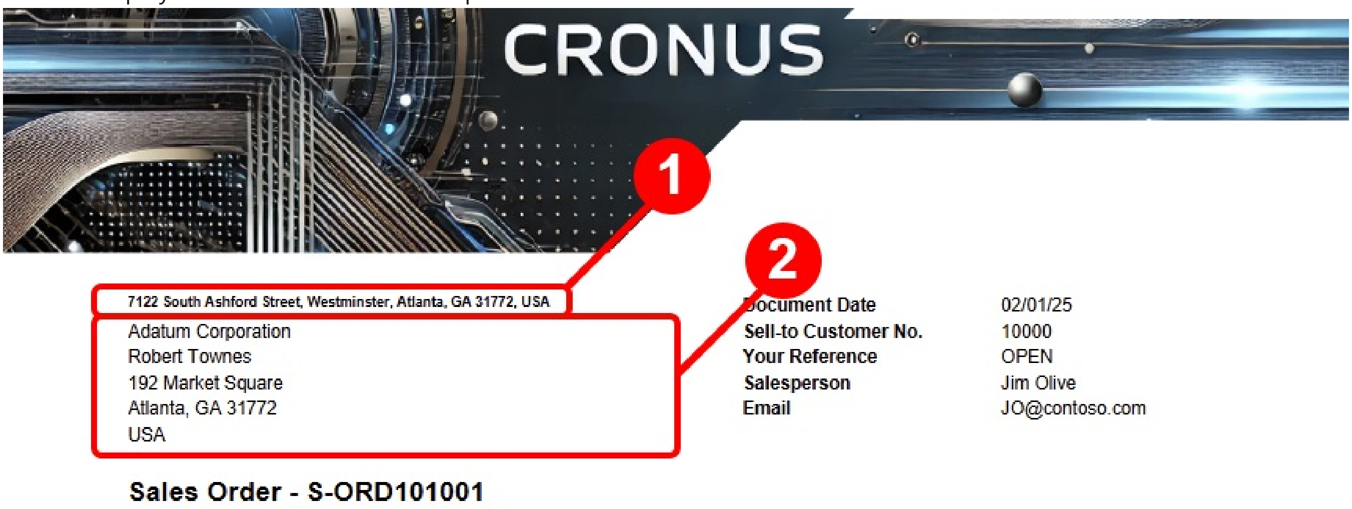
This section describes how you can edit the address format.

To edit the address format for a report, proceed as follows:

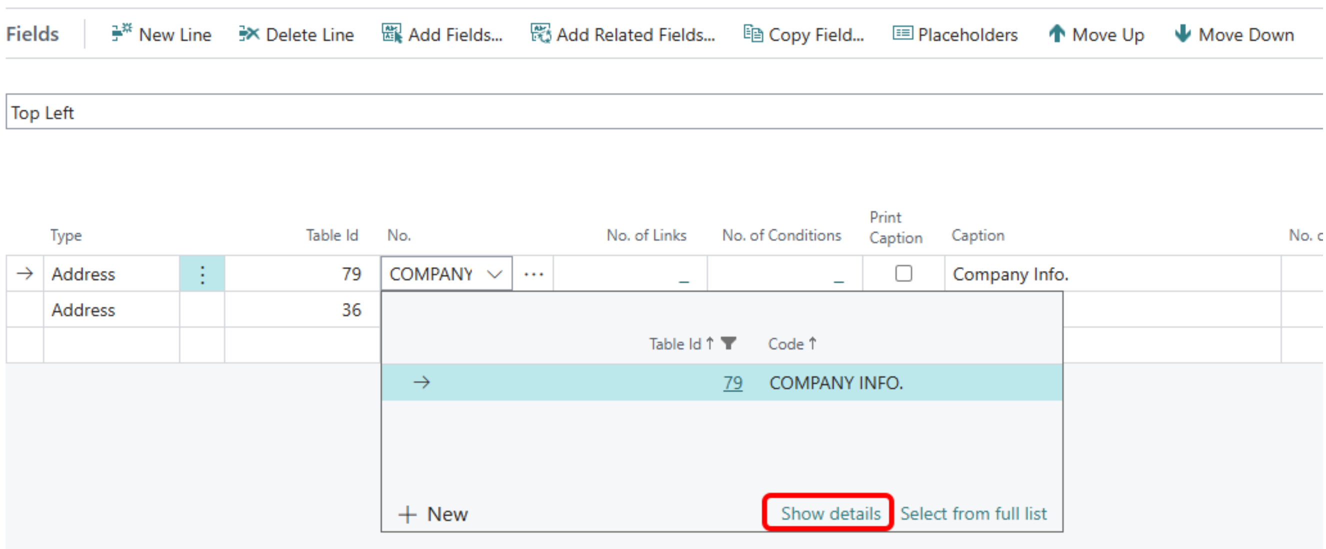
1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select one of the available reports from the list and click on the value under the **ID** column in the report line.
5. The report card is displayed.



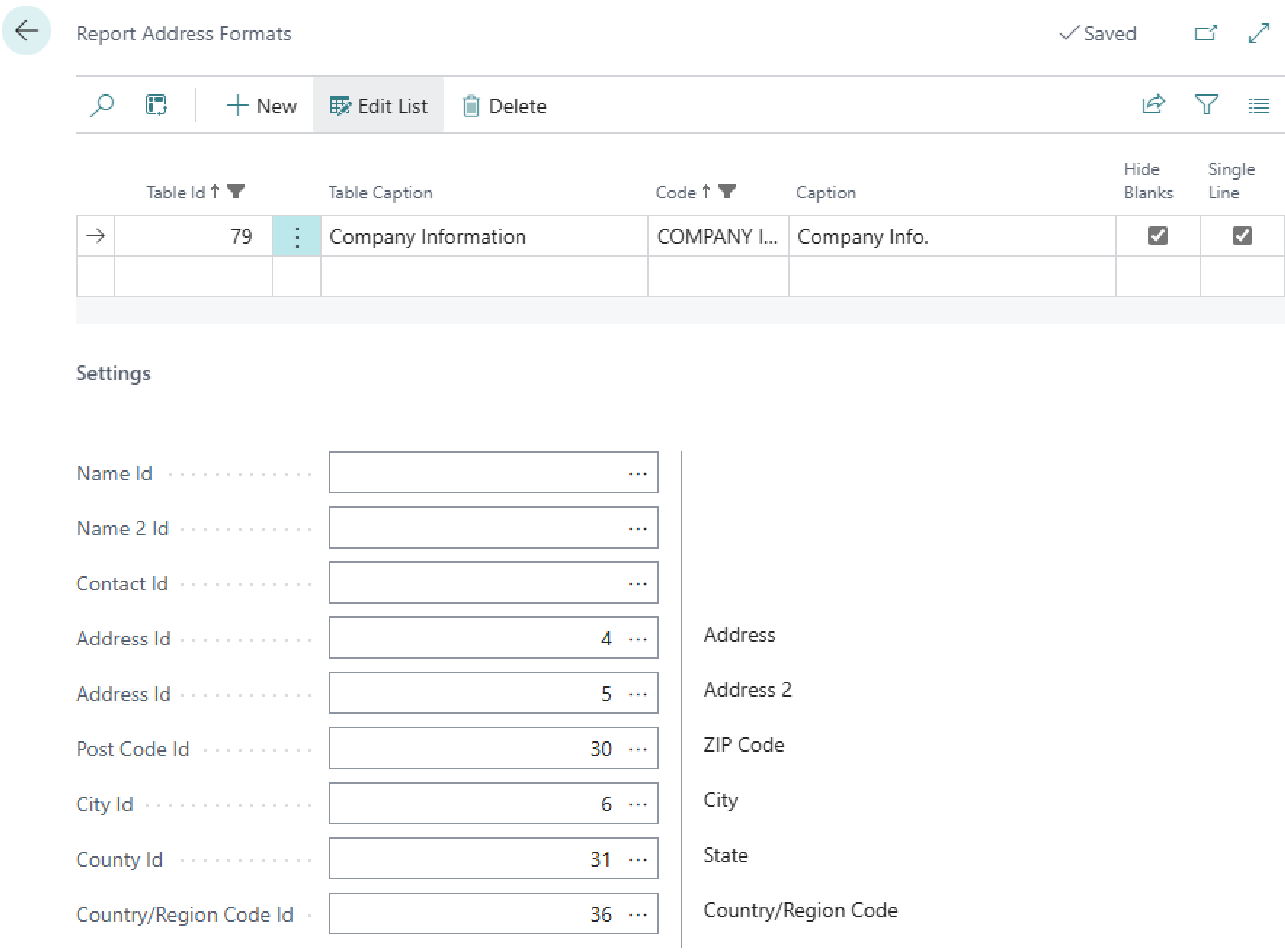
6. Scroll down to the **Fields** tab.
7. In the dropdown menu for the layout area, select the value **Top Left**.
8. In the list for the **Top Left** layout area, there are two lines of the type **Address**. The two address lines control the content and the display of the addresses on the report.



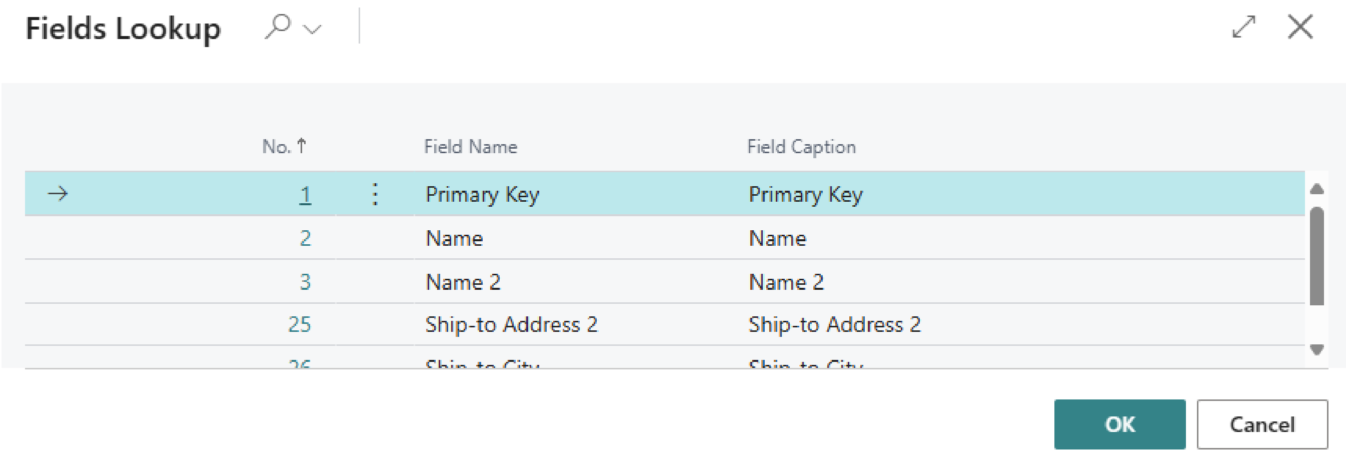
9. You can edit the font style, font size and font on the right-hand side of the corresponding line. To edit the printed content in the address fields, click on the value in the **No.** column in the corresponding line under the **Fields** tab. Open the dropdown menu and click on the **Show Details** option.



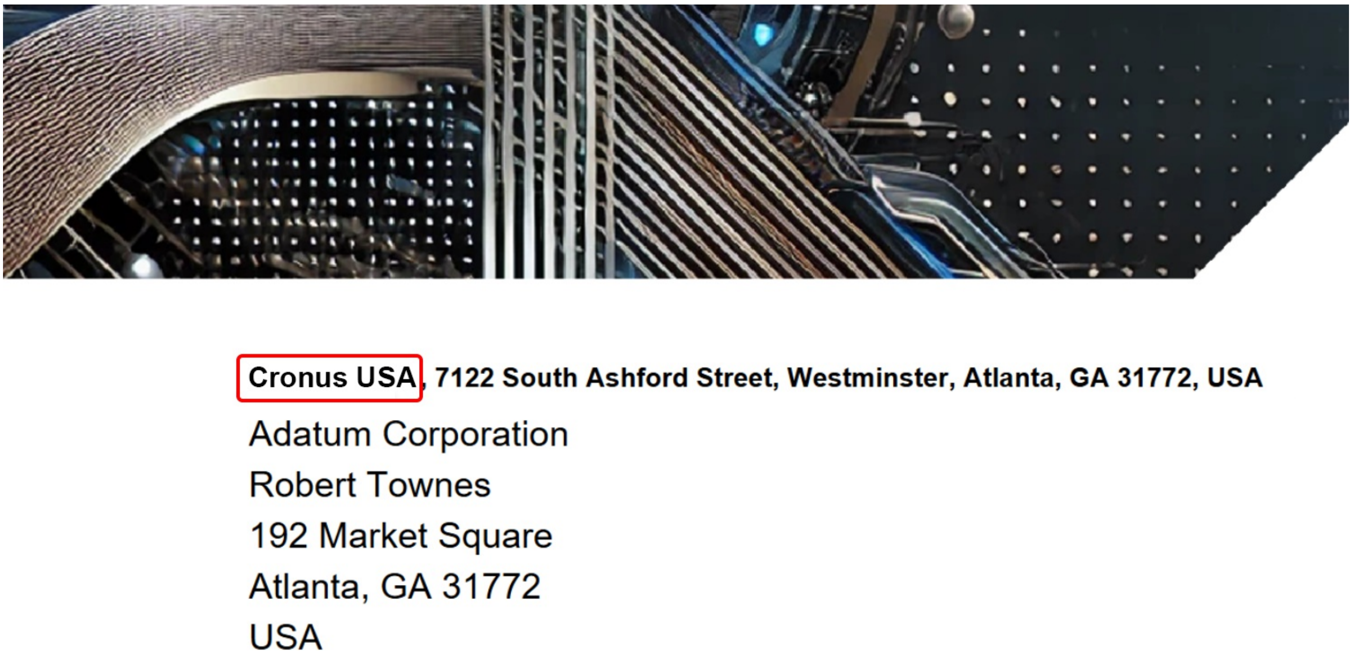
10. The **Report Address Formats** window is displayed.



11. A configuration is already defined by default on the **Report Address Formats** page.
12. If you want to include additional information, such as the company name in the address area (1), open the dropdown menu under the **Name ID** field and select the **Name** value from the **Fields Lookup**.



13. To apply the change and add the name of your company to the address field, click **OK**.
14. The window is closed and the selected value is transferred to the **Name ID** field.
15. To close the **Report address formats** window and return to the **Report settings** page, press the ESC key on the keyboard.



> **NOTE**
>
> **Info**
> Please note that the report you want to use must be activated in your Business Central. For more information on how to deactivate the standard report from Business Central and activate the reports from **Beyond ReportsV2**, please refer to the chapter Activate Reports.

You have edited the address line. For more information on how to add a new field with a field value to a layout area, see the section Add Field to Report.

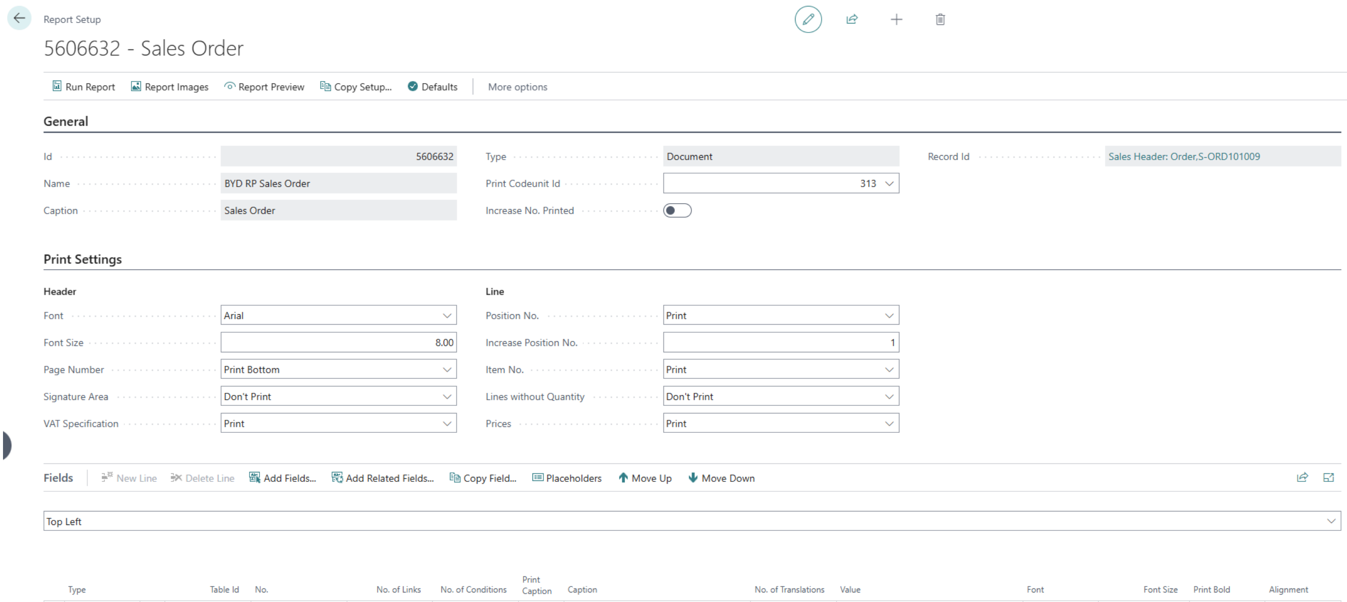
Beyond ReportsV2 also allows you to reference field values that are related to the source field (**Salesperson Code** -> **Salesperson Name**). For more information on how to add a related field to a report, see the section Add Related Field to Report.

Add Field to Report

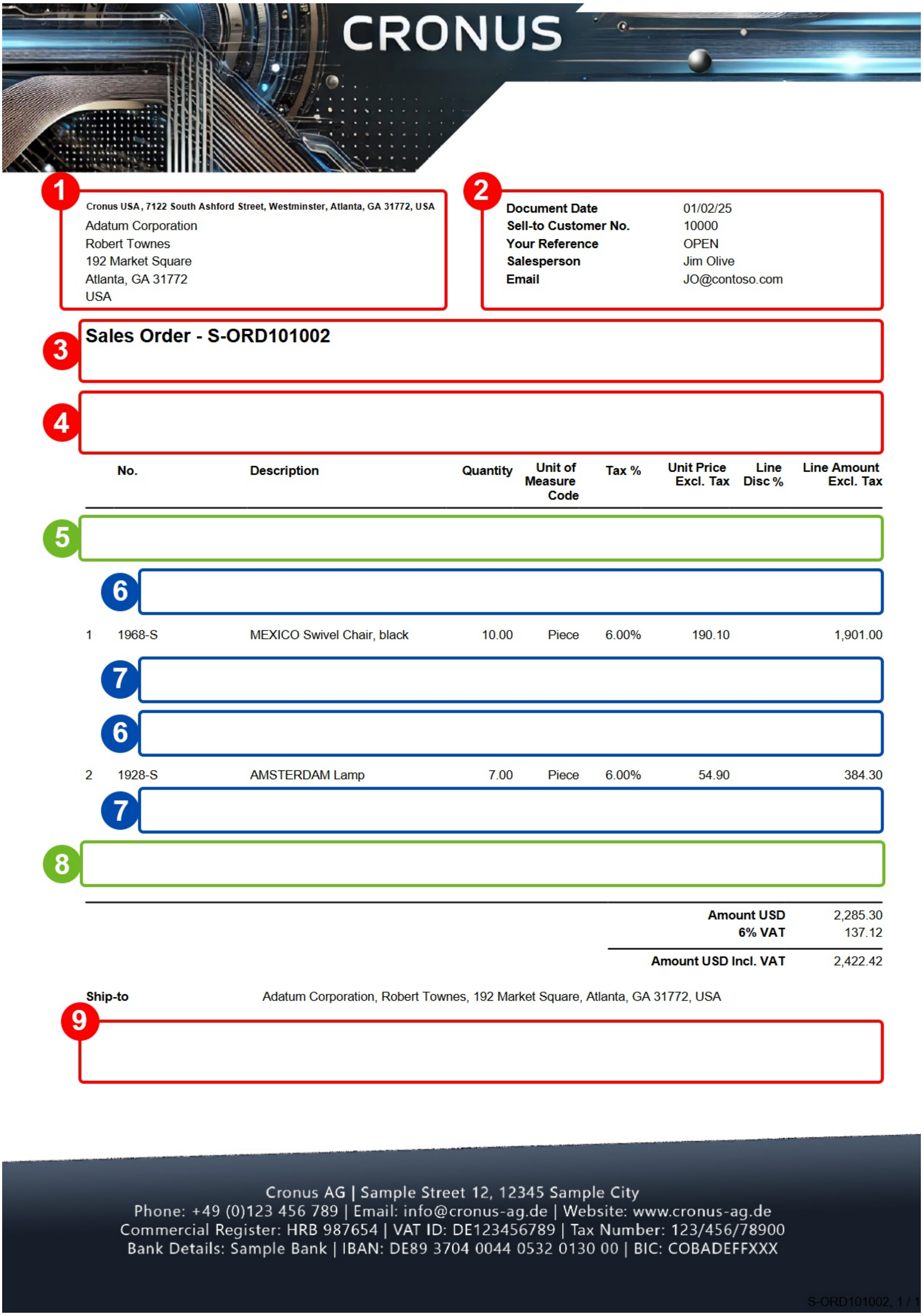
This section describes how to add a field to a report. **Beyond ReportsV2** allows you to add new fields with their corresponding field value as well as related fields and their field value to the report. For more information on related fields, see the section Add Related Field to Report.

To add a field to a report, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select the relevant report from the list and click on the value under the **ID** column in the report line.
5. The report card is displayed.



6. Under the **Fields** tab, select the layout area to which you want to add the field. In the following screenshot, you can identify the individual layout areas by number.
   - **1**: **Top Left**: *This layout area is located at the top left of the report and is primarily used as the address area. For more information on setting the address, please refer to the section Edit Report Address Format*.
   - **2**: **Top Right**: *This layout area is located at the top right of the report and is primarily used to display additional information relevant to the report.
   - **3**: **Top**: *This layout area is located in the report below the address area and the report information.
   - **4**: **Top Columns**: **This layout area is located in the report above the column headers for the report lines.
   - **5**: **Before Lines**: *This layout area is located **before** all report lines.
   - **6**: **Before Line**: *This layout area is located before each report line. Please note that this layout area is repeated ***per line**.
   - **7**: **After Line**: *This layout area is located after each report line. Please note that this layout area is repeated ***per line**.
   - **8**: **After Lines**: *This layout area is located **after** all report lines.*
   - **9**: **Bottom**: *This layout area is located at the bottom of the report.*



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Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772
USA

Document Date	01/02/25
Sell-to Customer No.	10000
Your Reference	OPEN
Salesperson	Jim Olive
Email	JO@contoso.com

Sales Order - S-ORD101002

	No.	Description	Quantity	Unit of Measure Code	Tax %	Unit Price Excl. Tax	Line Disc %	Line Amount Excl. Tax
1	1968-S	MEXICO Swivel Chair, black	10.00	Piece	6.00%	190.10		1,901.00
2	1928-S	AMSTERDAM Lamp	7.00	Piece	6.00%	54.90		384.30

Amount USD	2,285.30
6% VAT	137.12
Amount USD Incl. VAT	2,422.42

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Phone: +49 (0)123 456 789 | Email: info@cronus-ag.de | Website: www.cronus-ag.de
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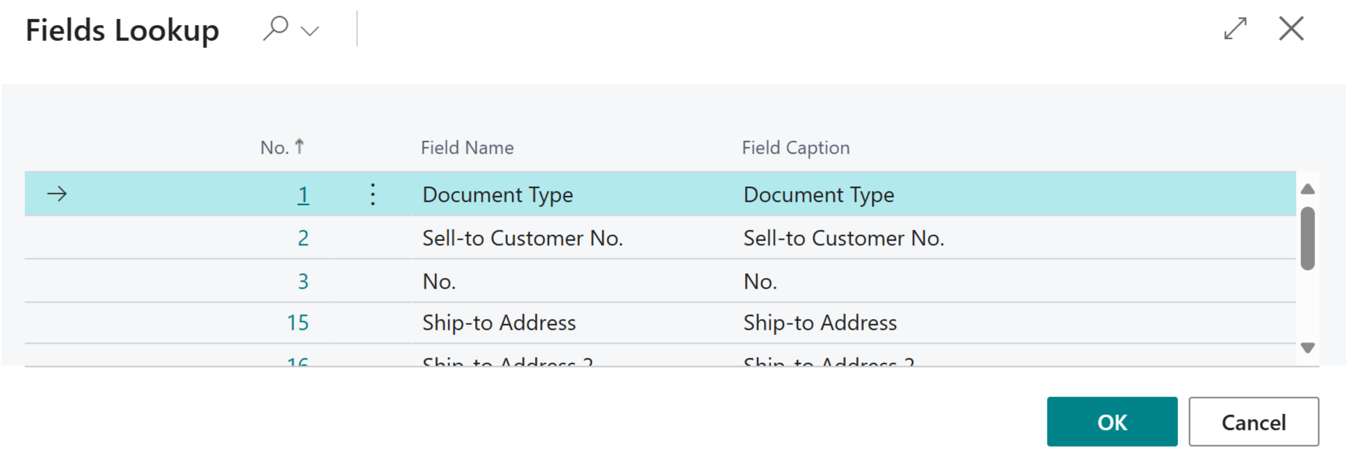
Bank Details: Sample Bank | IBAN: DE89 3704 0044 0532 0130 00 | BIC: COBADEFFXXX

S-ORD101002, 1 / 1

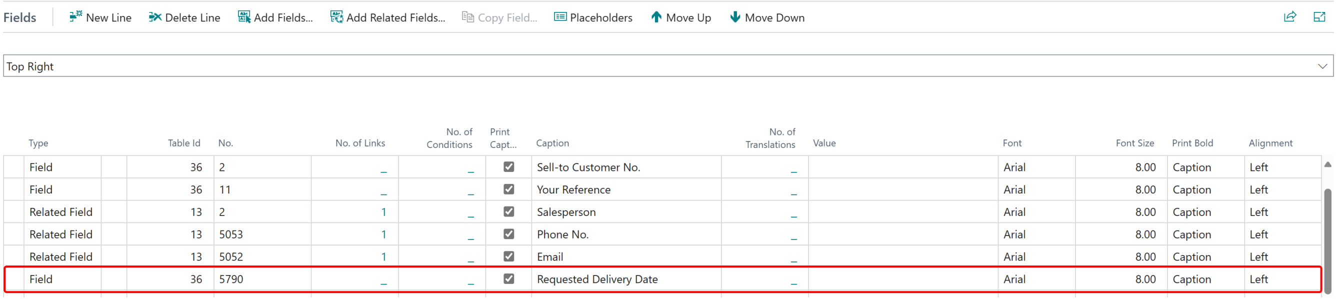
Other selectable areas such as **Line**, **Totals** and **VAT Specification** are reserved by the system and cannot be edited. If you want to hide the **VAT Specification** report area, you will find the corresponding setting in the Define Print Settings section.

7. In our example, we select the layout area **Top Right** (2).
8. Click on the **Add Fields** option under the **Fields** section in the menu bar.

9. The **Fields Lookup** window is displayed.



10. From the list of available fields, select the field you want to add to the report. In our example, we add the field **Requested Delivery Date** (ID: **5790**).
11. The **Requested Delivery Date** field is added in the **Top Right** (2) list area of the report.



>[!INOTE]
>Please note that fields are only printed in the report if they have a field value. If fields that you add do not have a field value, they will not be printed in the report. If the field is not printed, you must maintain the data and enter a field value.

You have added a field to the report. In the corresponding line under the **Fields** section, you will find additional settings for formatting the field and the field value.

> [!INOTE]
> Please note that changes to the formatting in the **Fields** area override the general print settings, i.e. if you make a change in the **Font**, **Font Size**, **Print Bold** and **Alignment** columns for this line, this will only affect this line.

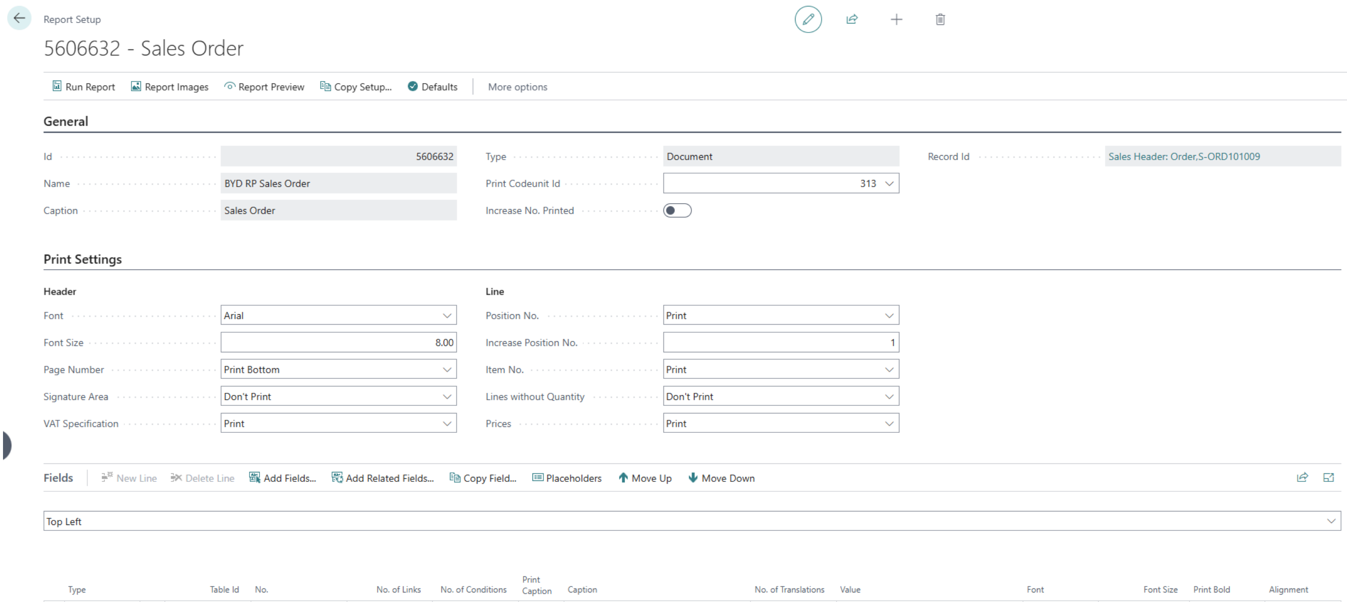
For more information on how to change the field caption in a report, see the section Edit Field Caption.

Add Related Field to Report

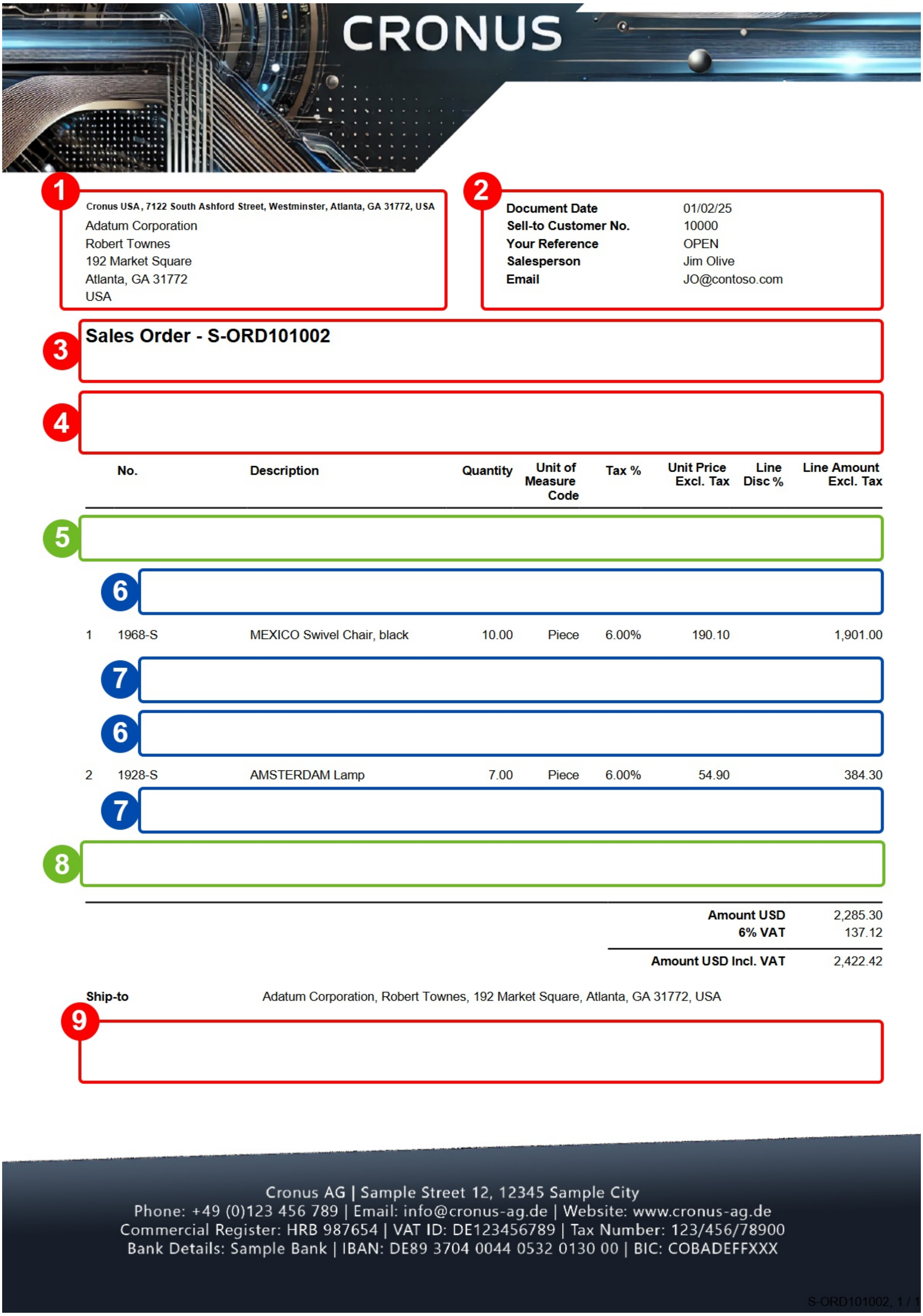
This section describes how to add one or more related fields to a report. The difference between a field and a related field is that with a related field, you are referencing a field value in a report that is not included in the corresponding report table by default. This description illustrates how to add the **Salesperson Code** field to the report and reference the field value/information associated with this code from another table instead of the value (for example **DH**). For example, this could be the salesperson's name, the salesperson's specific phone number and/or the salesperson's email address.

To add a related field to a report, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select the corresponding report in the list and click on the value under the **ID** column in the report line.
5. The report card is displayed.



6. Under the **Fields** tab, select the layout area to which you want to add the related field. In the following illustration, you can identify the individual areas by number.
   - **1**: **Top Left**: *This layout area is located at the top left of the report and is primarily used as the address area. For more information on setting the address, please refer to the section Edit Report Address Format.*
   - **2**: **Top Right**: *This layout area is located at the top right of the report and is primarily used to display additional information relevant to the report.
   - **3**: **Top**: *This layout area is located in the report below the address area and the report information.
   - **4**: **Top Columns**: **This layout area is located in the report above the column headers for the report lines.
   - **5**: **Before Lines**: *This layout area is located **before* all report lines.
   - **6**: **Before Line**: *This layout area is located before each report line. Please note that this layout area is repeated ***per line*.*
   - **7**: **After Line**: *This layout area is located after each report line. Please note that this layout area is repeated ***per line*.*
   - **8**: **After Lines**: *This layout area is located **after* all report lines.*
   - **9**: **Bottom**: *This layout area is located at the bottom of the report.*


1

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USA

2

Document Date	01/02/25
Sell-to Customer No.	10000
Your Reference	OPEN
Salesperson	Jim Olive
Email	JO@contoso.com

3

Sales Order - S-ORD101002

4

	No.	Description	Quantity	Unit of Measure Code	Tax %	Unit Price Excl. Tax	Line Disc %	Line Amount Excl. Tax
1	1968-S	MEXICO Swivel Chair, black	10.00	Piece	6.00%	190.10		1,901.00
2	1928-S	AMSTERDAM Lamp	7.00	Piece	6.00%	54.90		384.30

5 6 7 6 7 8

Amount USD	2,285.30
6% VAT	137.12
Amount USD Incl. VAT	2,422.42

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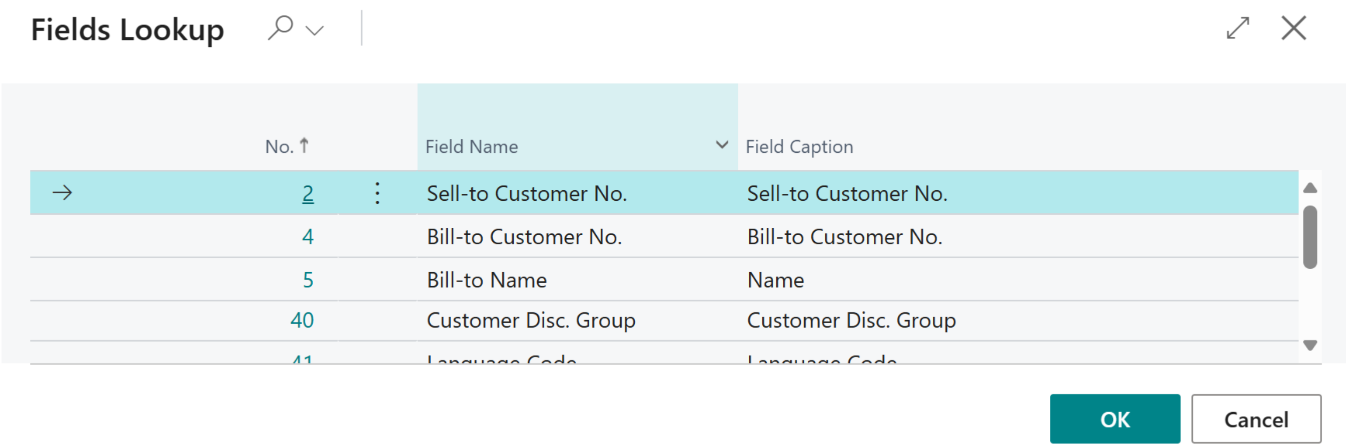
S-ORD101002, 1 / 1

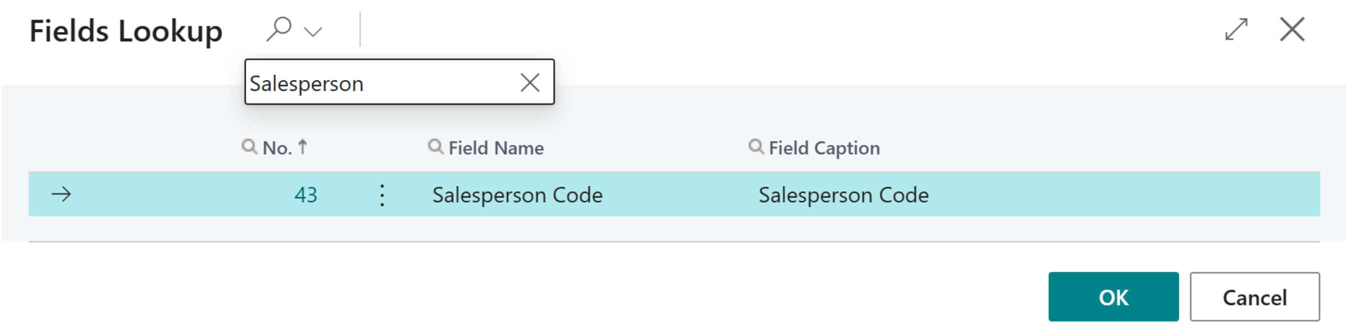
Other selectable areas such as **Line**, **Totals** and **VAT Specification** are reserved by the system and cannot be edited. If you want to hide the **VAT Specification** report area, you will find the corresponding setting in the Define Print Settings section.

7. In our example, we select the layout area **Top Right** (2).
8. Click on the **Add Related Fields** option under the **Fields** section in the menu bar.

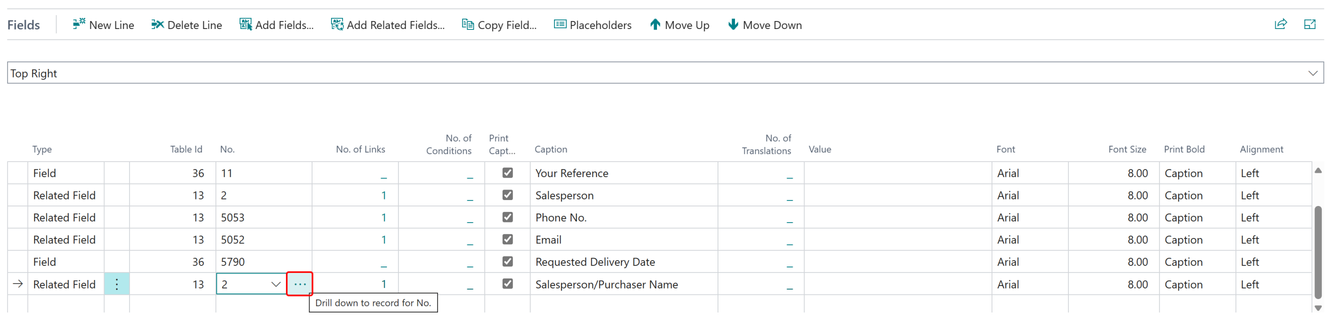
9. The **Field Lookup** window is displayed.



10. From the list of available related fields, select the field you want to add to the report. In our example, we add the related field **Salesperson Code** (ID: **43**). You can use the search to find corresponding fields from the list.



11. Confirm the selection with **OK**.
12. The **Salesperson Code** field is added in the **Top Right** (2) list area of the report. Note that the table ID in this case is not **36** (ID for the **Sales Header** table) but **13** (ID for the **Salesperson/Purchaser** table).
13. Click on the value under the **No.** column and select the ellipsis (**...**).



14. The **Fields Lookup** window is displayed.
15. Select the value **Name** (ID: **2**). This defines that you want to add the value of the linked field **Name** from the table **13** (**Salesperson/Purchaser**) to the report for the field value **Salesperson Code**.
16. The line for the related field is updated to the list area of the report setup and displays the corresponding selection. You can use the adjacent **Conditions** column to define conditions under which this field is printed (for example, that the related fields or fields in general should only be printed in the report if a certain condition is met). Further information on this can be found in the section Define Condition for Field.
17. You have added a related field to the report. In the corresponding line under the **Fields** section, you will find additional settings for formatting the field and the field value.
    >[!INOTE]
    >Please note that changes to the formatting in the **Fields** area override the general print settings, i.e. if you make a change to the **Font**, **Font size**, **Print Bold** and **Alignment** columns for this line, this will only affect this line.
18. To add the phone number of the corresponding salesperson in the report in the same way, click on the **Add Related Fields** option in the menu bar.
19. In the **Fields Lookup** window, select the **Salesperson Code** field (ID: **43**). You can use the search function to find the field

more quickly in the list.
20. Click **OK** to add the field to the list.
21. Under the newly added line, click on the **Fields** tab in the **No.** column and change the value to **5053** (Field: **Phone No.**).
22. To add the email address of the corresponding salesperson in the report in the same way, click on the **Add Linked Fields** option in the menu bar.
23. In the **Fields Lookup** window, select the **Salesperson Code** field (ID: **43**). You can use the search function to find the field more quickly in the list.
24. Click **OK** to add the field to the list.
25. Under the newly added line under the **Fields** tab, click in the **No.** column and change the value to **5052** (Field: **Email**).
 >[!NOTE]
 >Please note that fields are only printed in the report if they have a field value. If fields that you add do not have a field value, they will not be printed in the report. If the field with the field value is not printed, you must maintain the data and enter a field value.

You have included the salesperson's name, e-mail address and telephone number in the report.

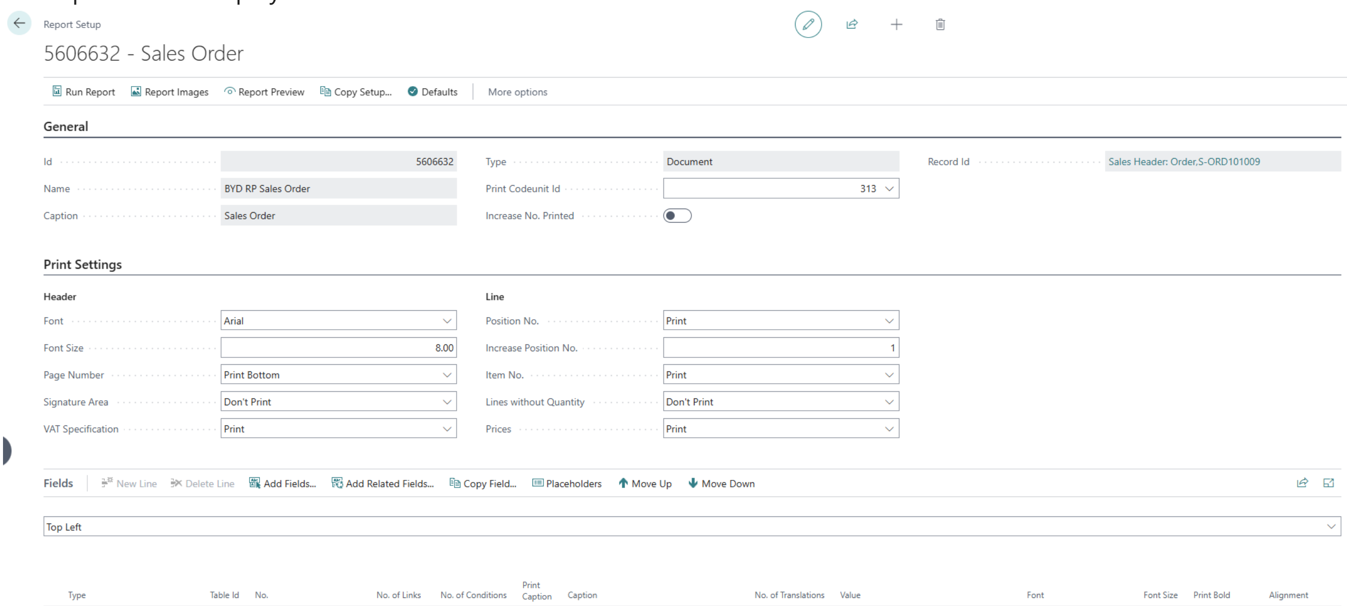
For more information on how to change the field caption in a report, for example, see the section Change Field Caption.

Move Field in Report

This section describes how you can change the order of fields in the report.

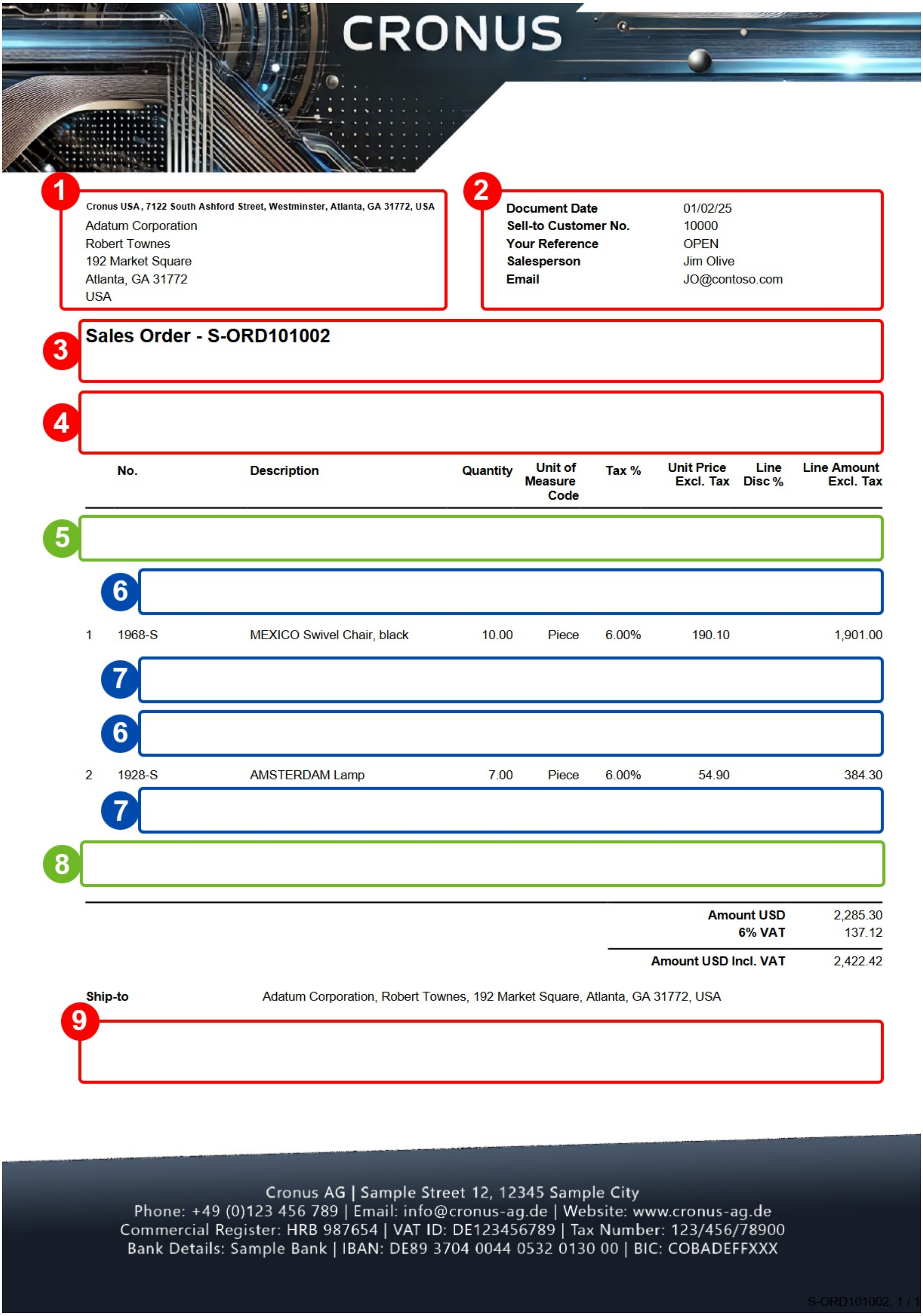
To change the order of a field in a report and move it up or down in the report, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select the corresponding report in the list and click on the value under the **ID** column in the report line.
5. The report card is displayed.

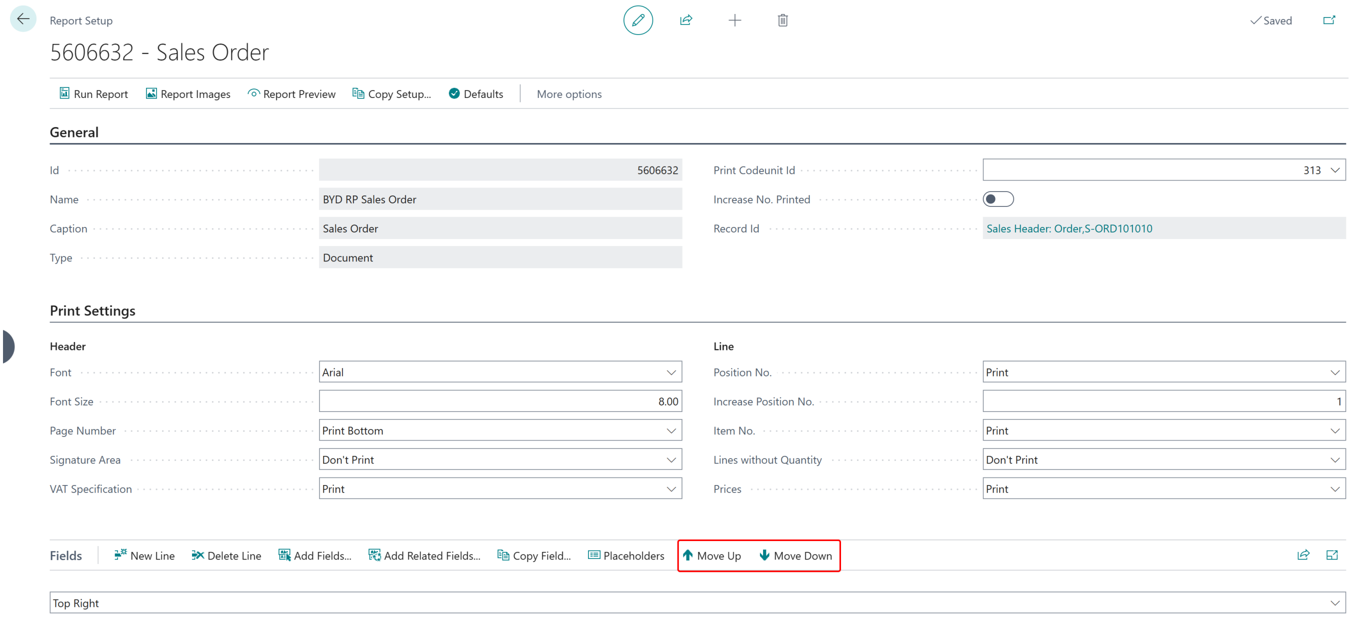


6. Under the **Fields** tab, select the layout area that contains the field you want to move in the report. In the following image, you can identify the individual areas by number.
   - **1**: **Top Left**
   - **2**: **Top Right**
   - **3**: **Top**
   - **4**: **Top Columns**
   - **5**: **Before Lines**
   - **6**: **Before Line**
   - **7**: **After Line**

- **8**: **After Lines**
- **9**: **Bottom**



7. Select the field that you want to move in the report.
8. Use the **Move Up** and **Move Down** buttons to control the order of the field in the report.



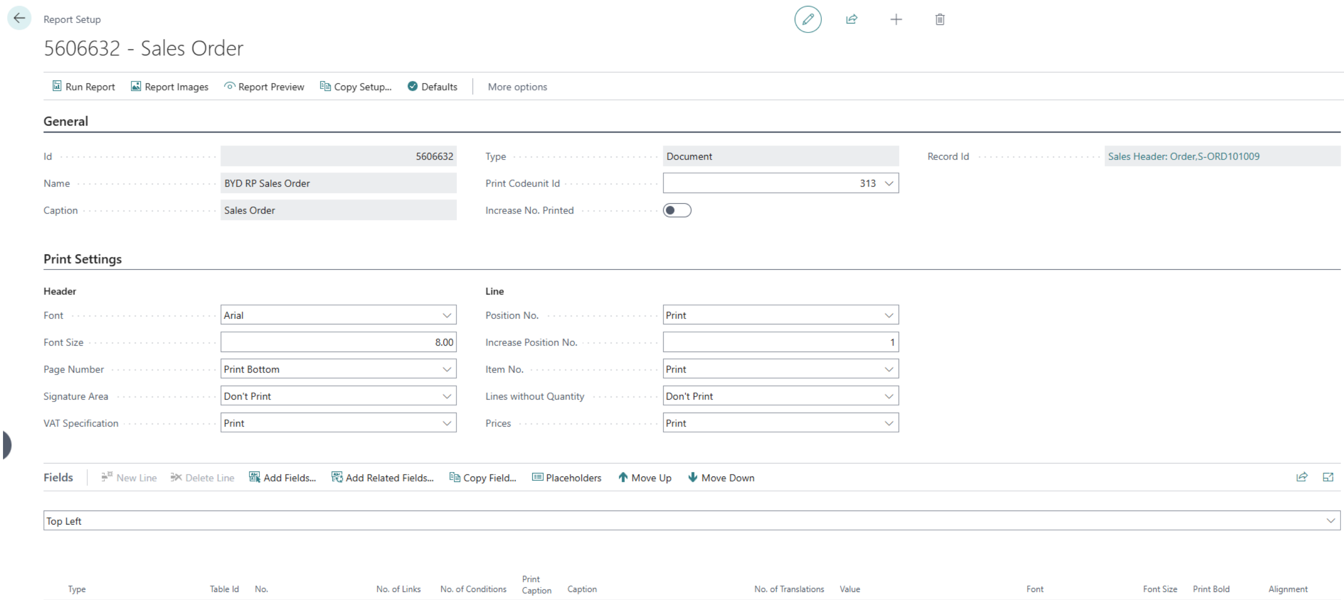
You have edited the order of the fields. You can use the **Run Report** button in the menu bar on the **Report Setup** page to check whether the order of the fields meets your requirements.

Edit Field Caption

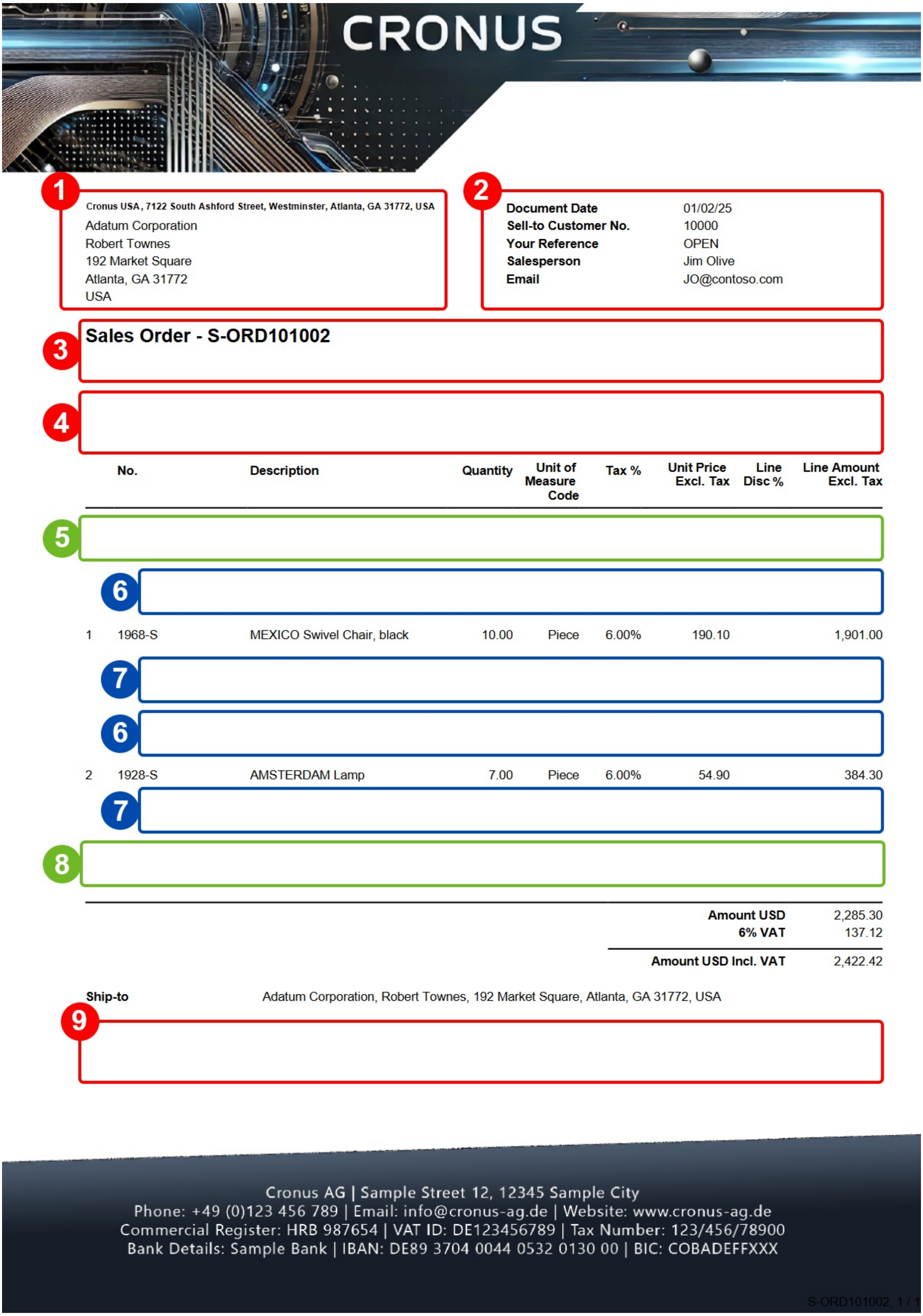
This section describes how you can change the field caption for a field.

To change a caption for a field, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select the corresponding report in the list and click on the value under the **ID** column in the report line.
5. The report card is displayed.



6. Under the **Fields** tab, select the layout area in which the field for which you want to change a caption is located. In this example, the caption for a field is changed. This field is printed in the **Top Right** (2) layout area.



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Document Date	01/02/25
Sell-to Customer No.	10000
Your Reference	OPEN
Salesperson	Jim Olive
Email	JO@contoso.com

Sales Order - S-ORD101002

	No.	Description	Quantity	Unit of Measure Code	Tax %	Unit Price Excl. Tax	Line Disc %	Line Amount Excl. Tax
1	1968-S	MEXICO Swivel Chair, black	10.00	Piece	6.00%	190.10		1,901.00
2	1928-S	AMSTERDAM Lamp	7.00	Piece	6.00%	54.90		384.30

Amount USD	2,285.30
6% VAT	137.12
Amount USD Incl. VAT	2,422.42

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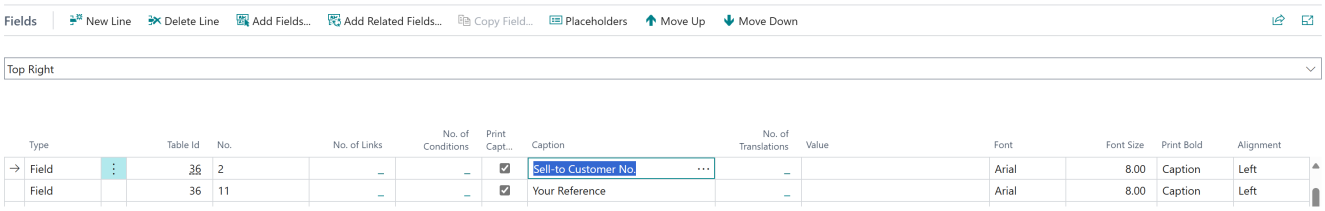
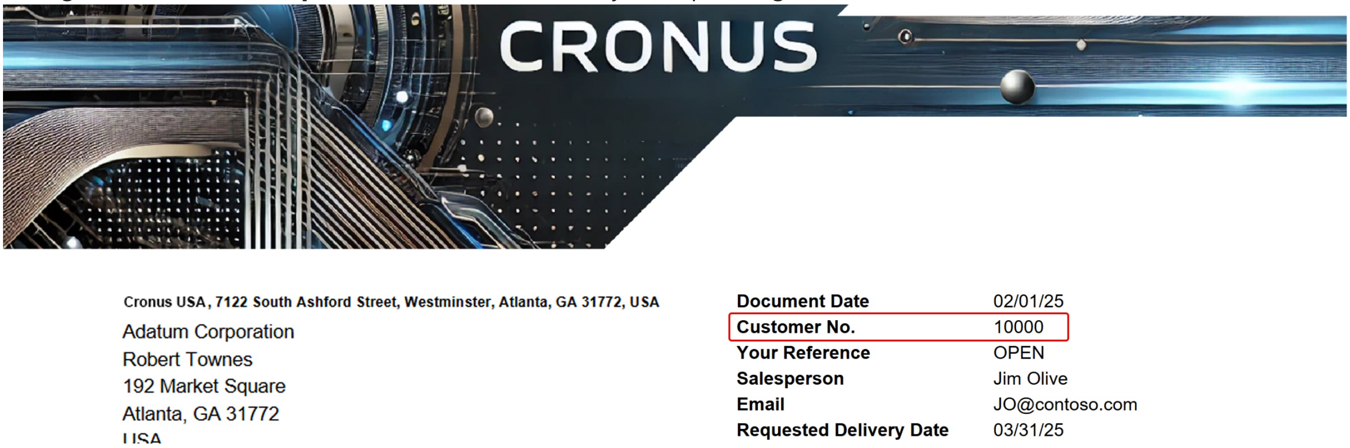
S-ORD101002, 1 / 1

7. On the **Report Detup** page under the **Fields** tab, click in the **Caption** column in the corresponding line for the field whose caption you want to change. In our example, we will change the caption for the field **Sell-to Customer No.**.



8. Change the value in the **Caption** field to the field label you require (e.g. **Customer No.**).



You have changed the caption of the field. You can also use this description to change the caption of the report (here: **Sales Order - 101002**). The corresponding layout area for this is **Top** (3).

In addition to changing the field caption, you can also define that field captions are not displayed/printed, but only the field values. For more information on how to hide the field caption, see the section Hide Field Caption.

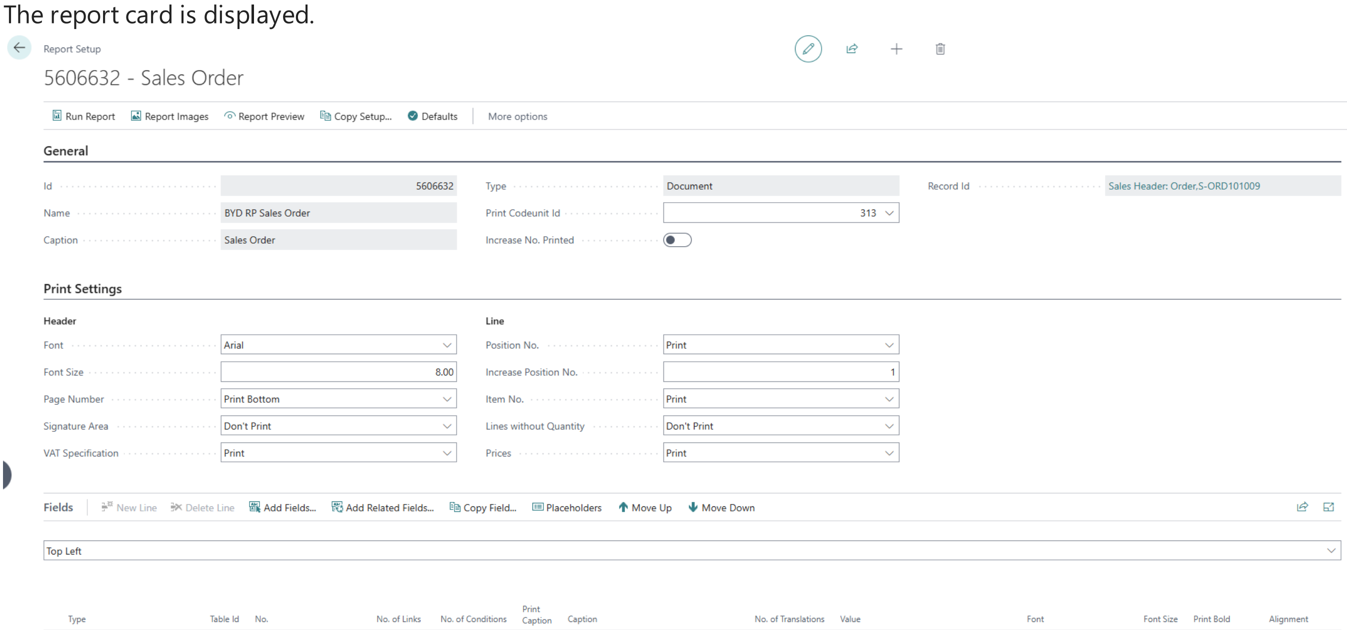
Please note that the field caption may also need to be adapted for other languages. Further information on this can be found in the section Add Translation for Field Caption.

Add Translation for Field Caption

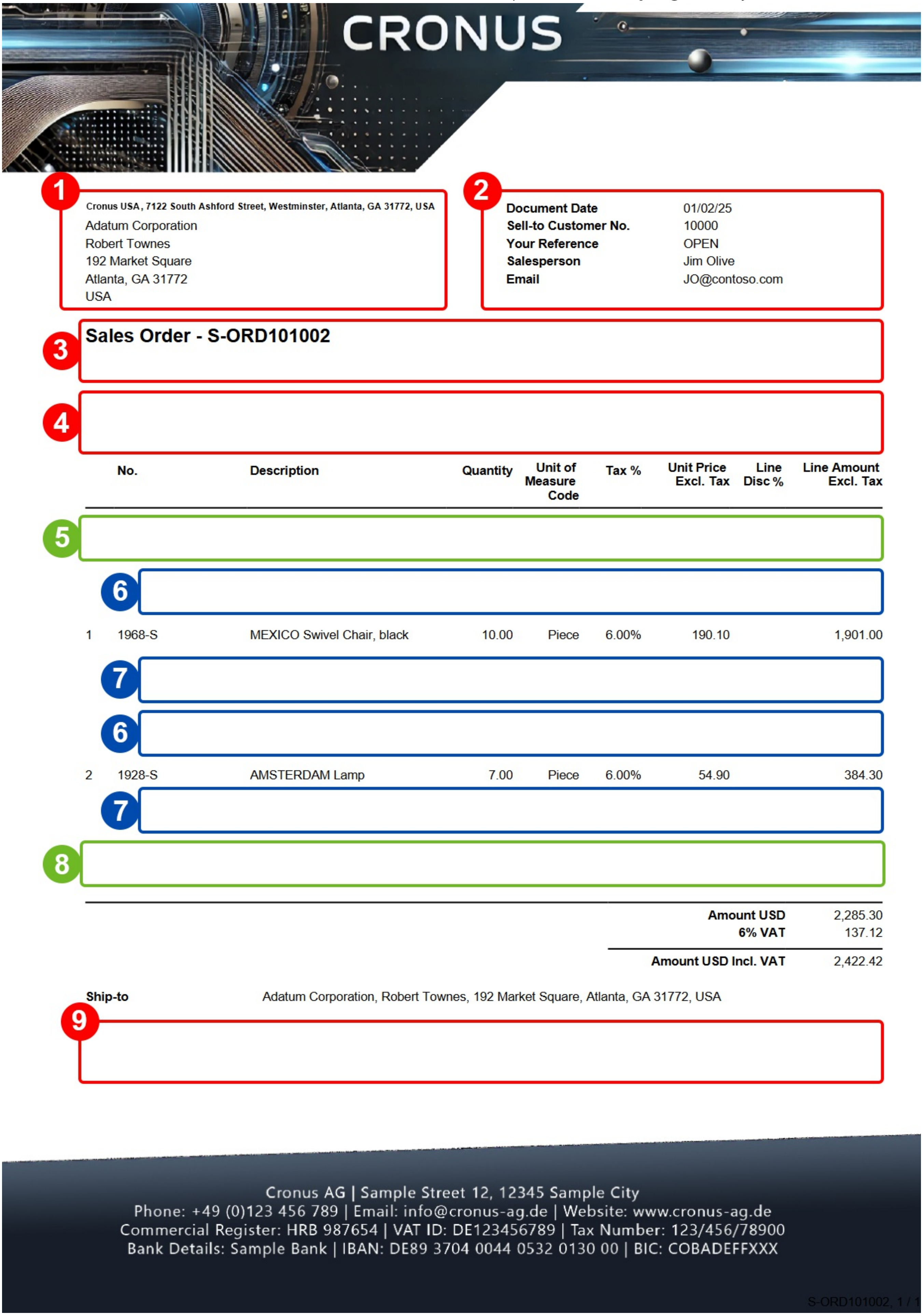
This section describes how you can add a translation for a field label.

To add a translation for a field label to the report, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select the corresponding report in the list and click on the value under the **ID** column in the report line.
5. The report card is displayed.



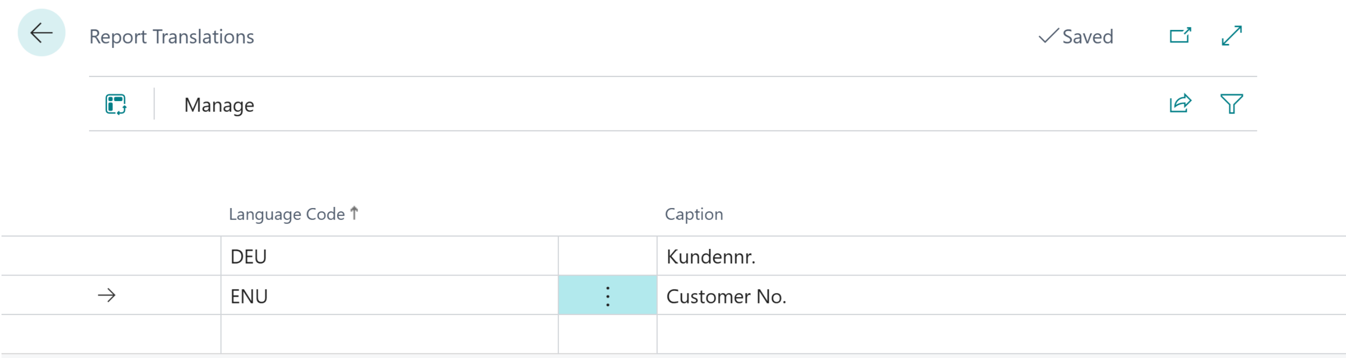
6. Under the **Fields** tab, select the layout area in which the field is located for which you want to add a translation for a field caption. In this example, a translation is added for a field caption that has been renamed in the Change Field Caption section from **Sell-To Customer No.** to **Customer No.**. This field is printed in the **Top Right** (2) layout area.



7. On the **Report Setup** page under the **Fields** tab, click in the **No. of Translations** column in the appropriate line for the

field whose caption you want to add a translation for. In our example, we will change the caption for the **Customer Number** field.

8. The **Report Translations** window is displayed.



9. Under the **Language Code** column, enter the language in which you would like to store a translation for the field caption.
10. Enter the translation in the selected language in the **Caption** column.

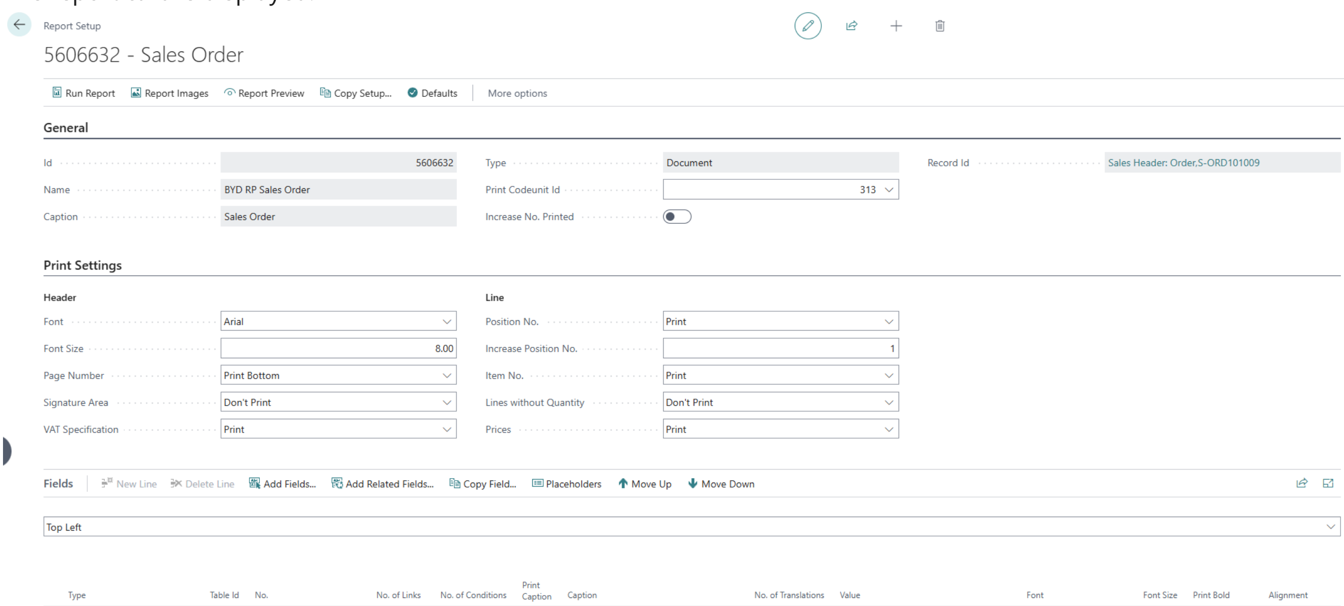
You have stored a translation for a field caption.

Hide Field Caption

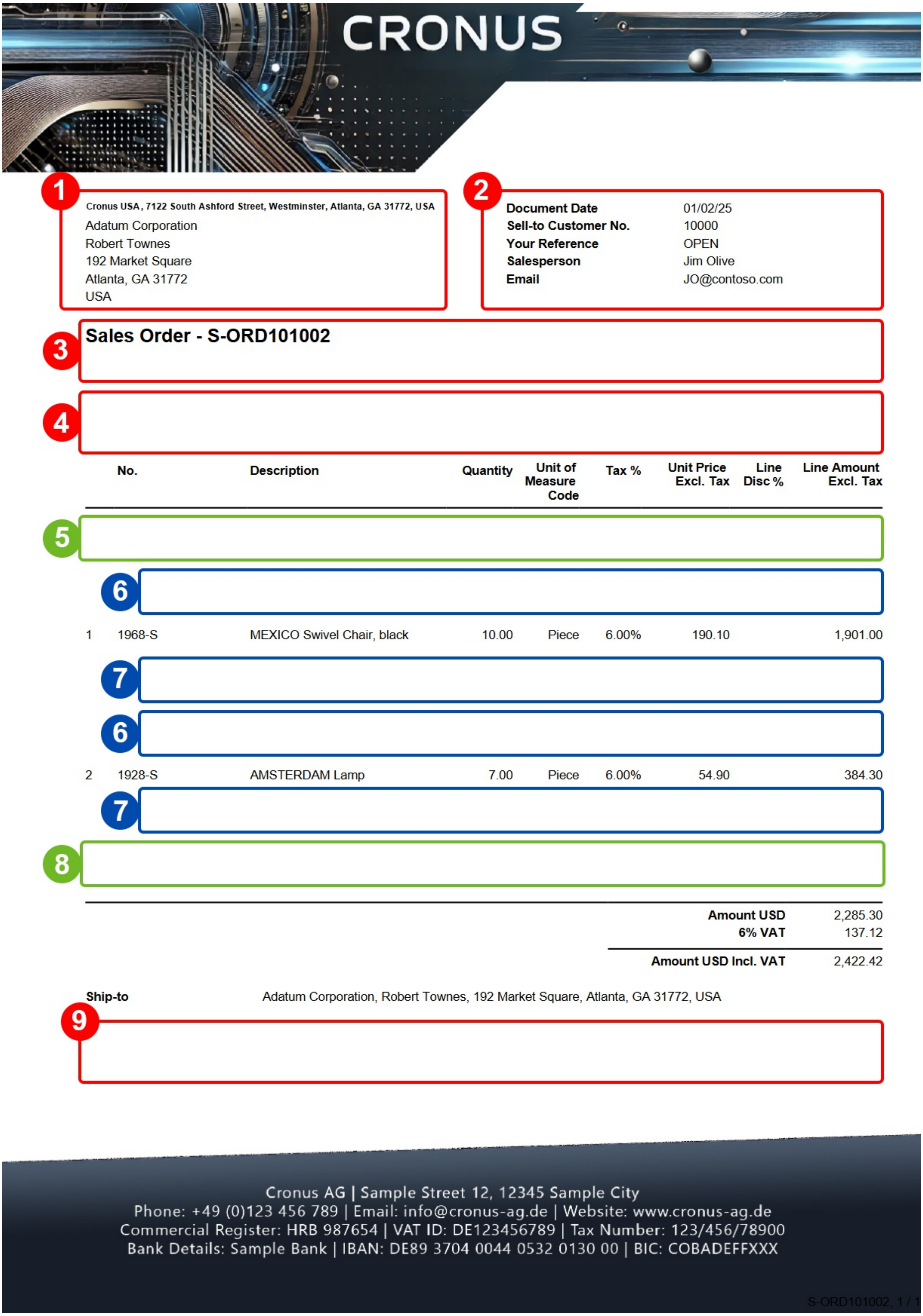
This section describes how to hide a field caption so that this caption is not printed in the report. Please note that the field value is printed accordingly.

To hide a field caption in the report, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select the corresponding report in the list and click on the value under the **ID** column in the report line.
5. The report card is displayed.



6. Scroll down to the **Fields** tab.
7. In the dropdown list for the layout area, select the area in which the field caption that you want to hide is located. In this example, we are hiding the field caption for the document date. The corresponding field is located in the layout area **Top Right** (2).



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Document Date	01/02/25
Sell-to Customer No.	10000
Your Reference	OPEN
Salesperson	Jim Olive
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Sales Order - S-ORD101002

	No.	Description	Quantity	Unit of Measure Code	Tax %	Unit Price Excl. Tax	Line Disc %	Line Amount Excl. Tax
1	1968-S	MEXICO Swivel Chair, black	10.00	Piece	6.00%	190.10		1,901.00
2	1928-S	AMSTERDAM Lamp	7.00	Piece	6.00%	54.90		384.30

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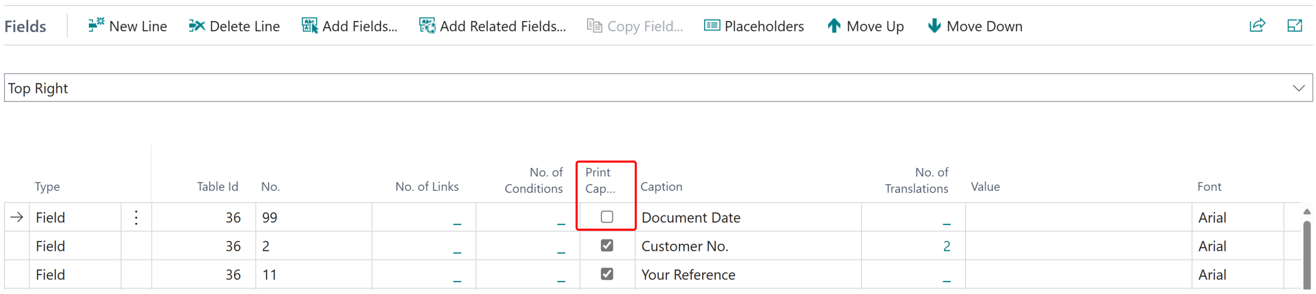
Bank Details: Sample Bank | IBAN: DE89 3704 0044 0532 0130 00 | BIC: COBADEFFXXX

S-ORD101002, 1 / 1

8. On the **Report Setup** page under the **Fields** tab, deactivate the **Print Caption** checkbox for the **Document Date** line.



The field label is no longer displayed or printed in the report. For more information on how to display or print the field and the field caption only under certain conditions, see the section Define Condition for Field.

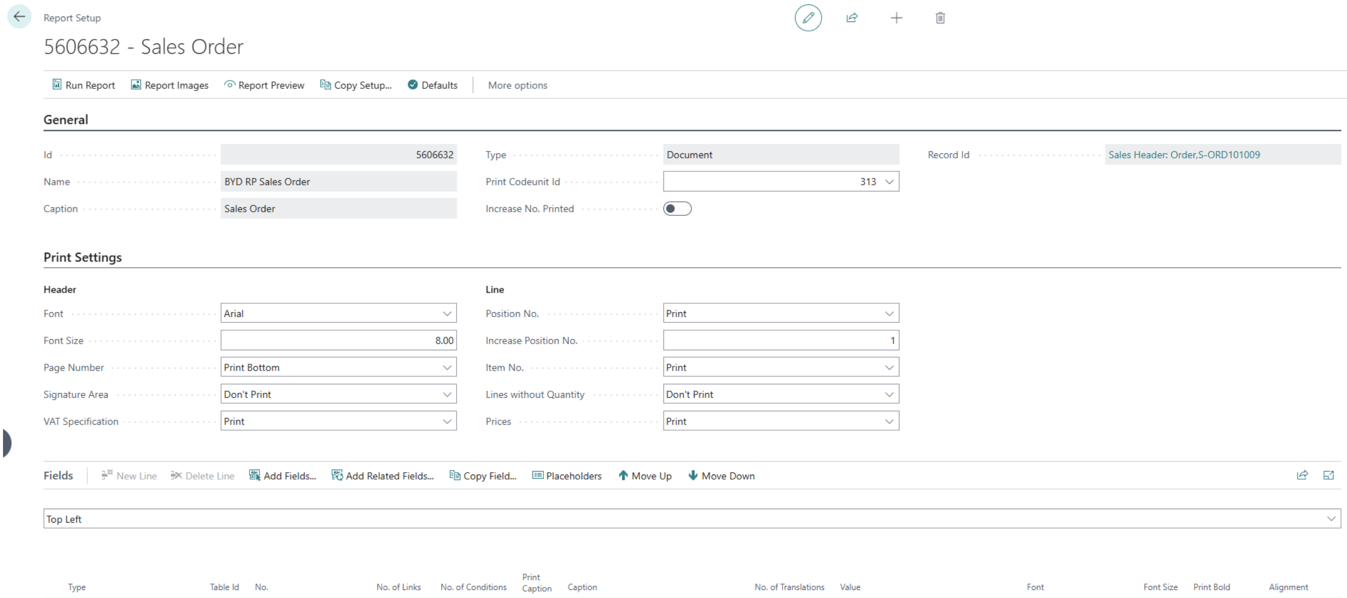
Define Condition for Field

This section describes how you can define conditions that control whether fields with information are displayed in the report. The following description provides an example of how to define a condition that displays additional information in the report when a sales order report is created for a specific customer (here the customer **Adatum Corporation**).

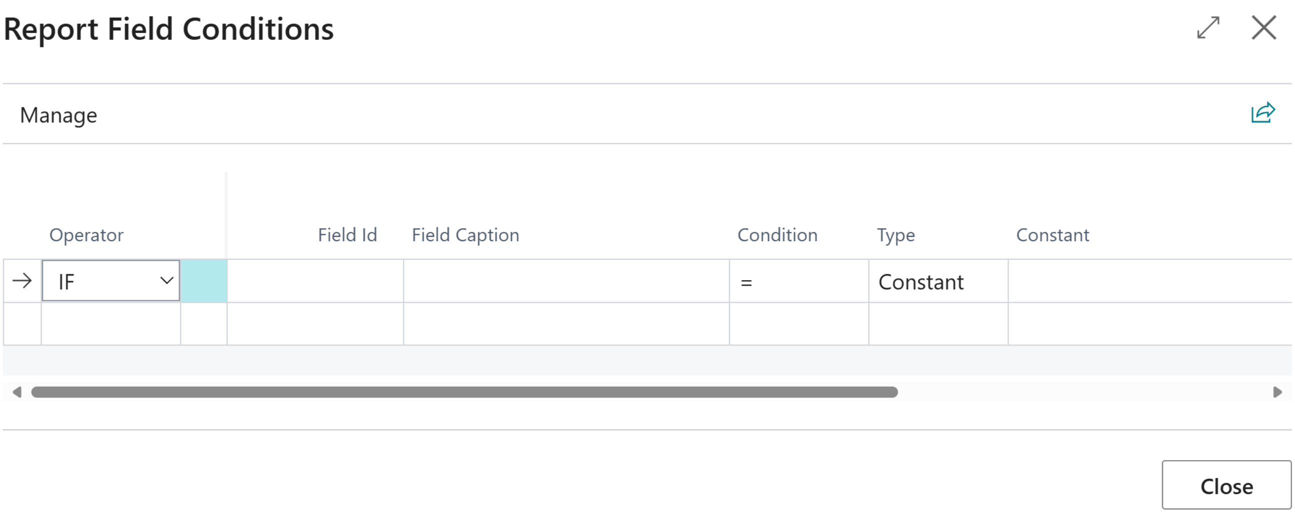
Beyond ReportsV2 allows you a variety of possible condition configurations, we are happy to help you with the setup. You can find our contact details in the chapter About Beyond ReportsV2.

To define one or more conditions, proceed as follows:

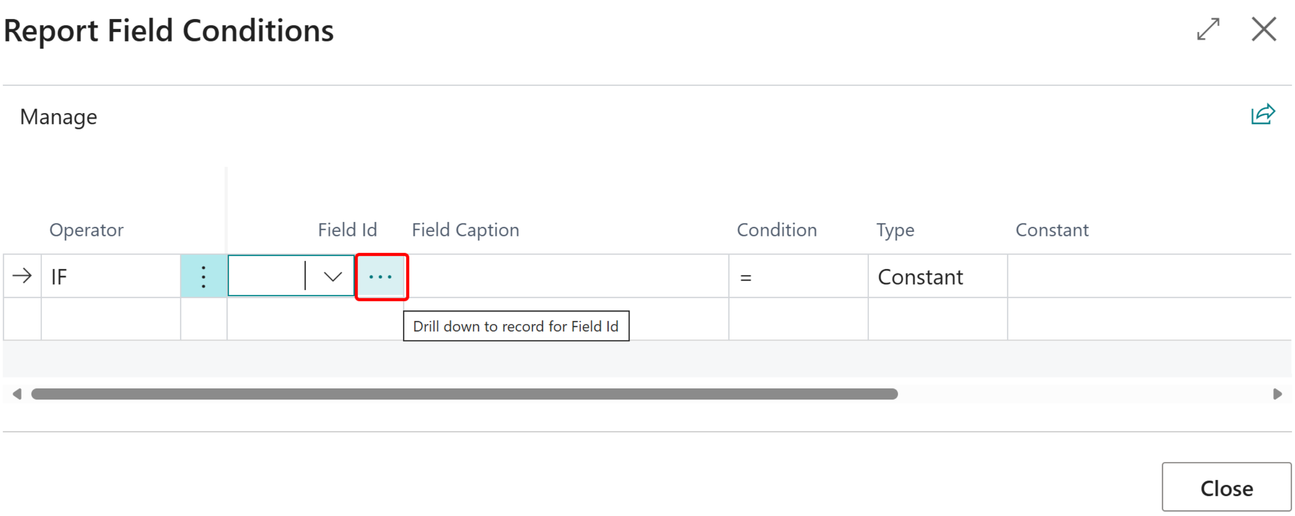
1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select the corresponding report in the list and click on the value under the **ID** column in the report line.
5. The report card is displayed.



6. Scroll down to the **Fields** tab.
7. In the drop-down list for the layout area, select the area in which the field for which you want to define a condition is located. In this example, we define a condition that only prints sales information for a specific customer in the report, i.e. the information is not printed on all other sales orders.
8. Under the **Fields** section, click in the corresponding line with the information about the salesperson (see section Add Related Field to Report) in the **No. of Conditions** column.
9. The **Report Field Conditions** window is displayed.

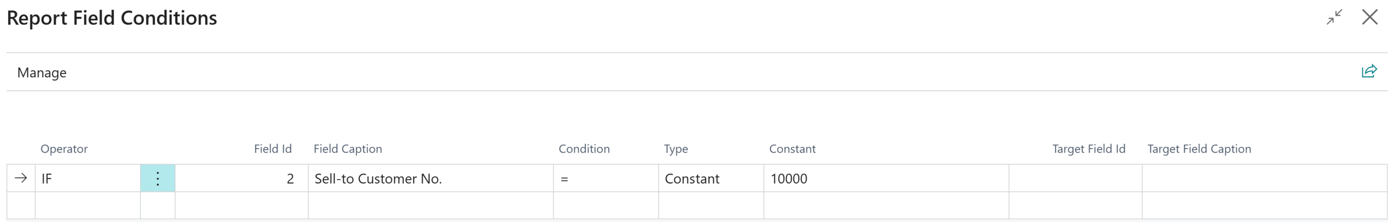


10. Select under the **Operator** column. You can use the following values to configure the condition:
    - **IF**: Select this value if you want to create a condition with an IF clause.
    - **AND**: Select this value to link two conditions with an AND conjunction.
    - **OR**: Select this value to separate two conditions with an OR disjunction.
11. In this example, certain information will only be printed in the report if the customer is **Adatum Corporation** (customer number: **10000**), so select the value **If** under the **Operator** column.
12. Click in the input field under the **Field ID** column and open the drilldown using the ellipsis button (**...**).



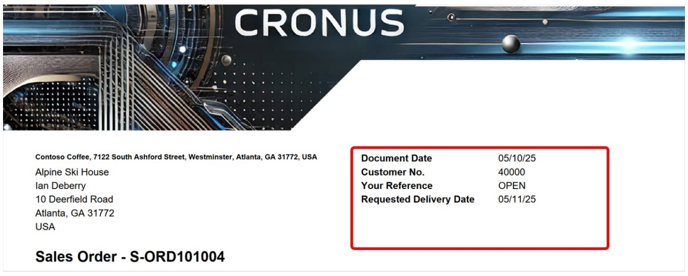
13. The **Fields Lookup** window is displayed.
14. From the **Fields Lookup** window, select the value that defines the condition. In this example, this would be **Sell-To Customer No.** (ID: **2**).
15. To confirm the selection, click on the **OK** button.
16. The view in the **Report Field Conditions** window is updated.
17. Define the condition in more detail. Under the **Condition** column, you can choose between the following values:
    - **=** Equal to a field value or constant
    - **<>** Not equal to a field value or constant
    - **>** Greater than a field value or constant
    - **<** Smaller than a field value or constant
18. For the example, the value **=** is selected under the **Condition** column.
19. Select between the following values under the **Type** column:
    - **Constant**: The field value under **Field ID** corresponds to a static value.
    - **Field**: The field value under **Field ID** corresponds to another field value.

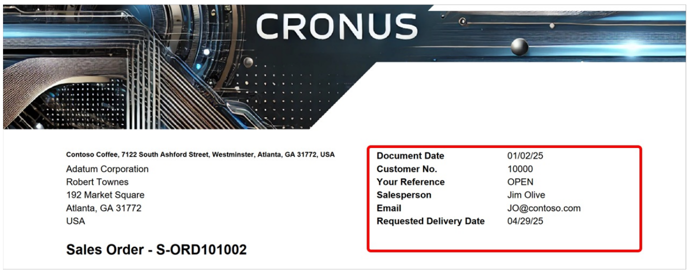
    In the example, the value **Constant** is selected under the **Type** column and the value **10000** (the corresponding customer number) is entered under the **Constant** column.



	Operator		Field Id	Field Caption	Condition	Type	Constant	Target Field Id	Target Field Caption
→	IF	⋮	2	Sell-to Customer No.	=	Constant	10000		

You have used the condition to define that certain sales order information is only displayed if the sales order is created for customer **10000** (**Adatum Corporation**).
In the following screenshot, you can see the difference in printing between sales order **101004** for customer **40000** (left) and sales order **101002** for customer **10000** (right).





Add Text Line to Report

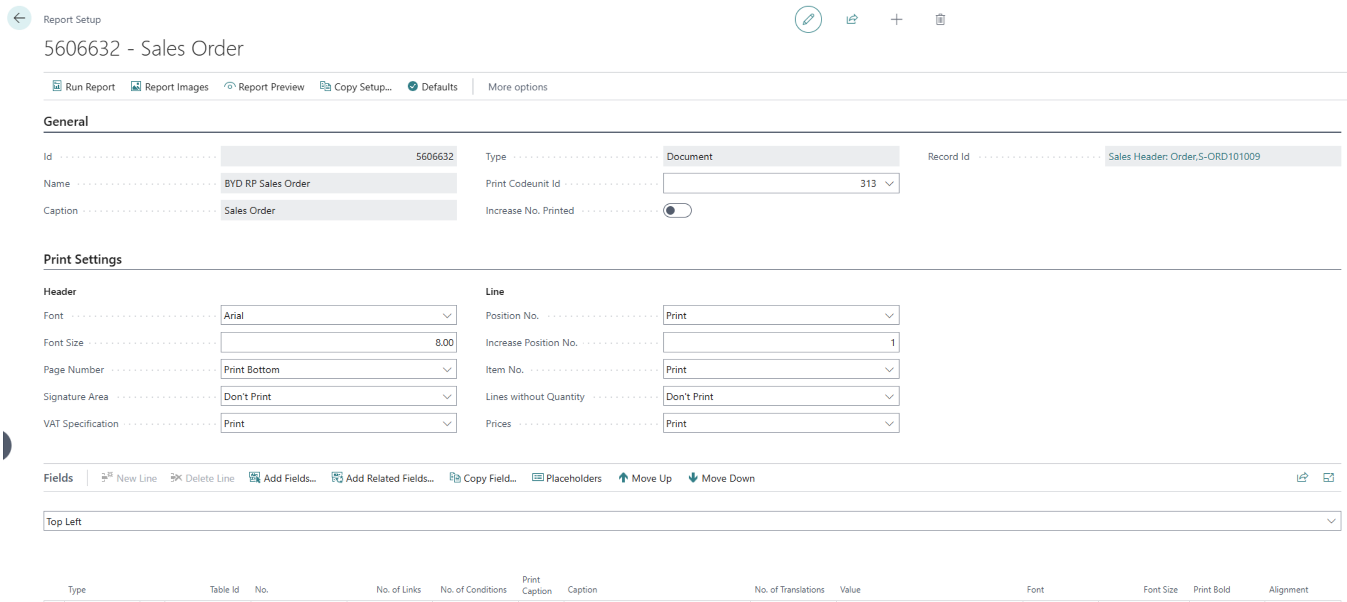
This section describes how to add a line of text to the report. In this example, these general text lines are added to a report:

> Thank you for your trust and your order!
> We are pleased to confirm your sales order.
> Your order will be processed as soon as possible.

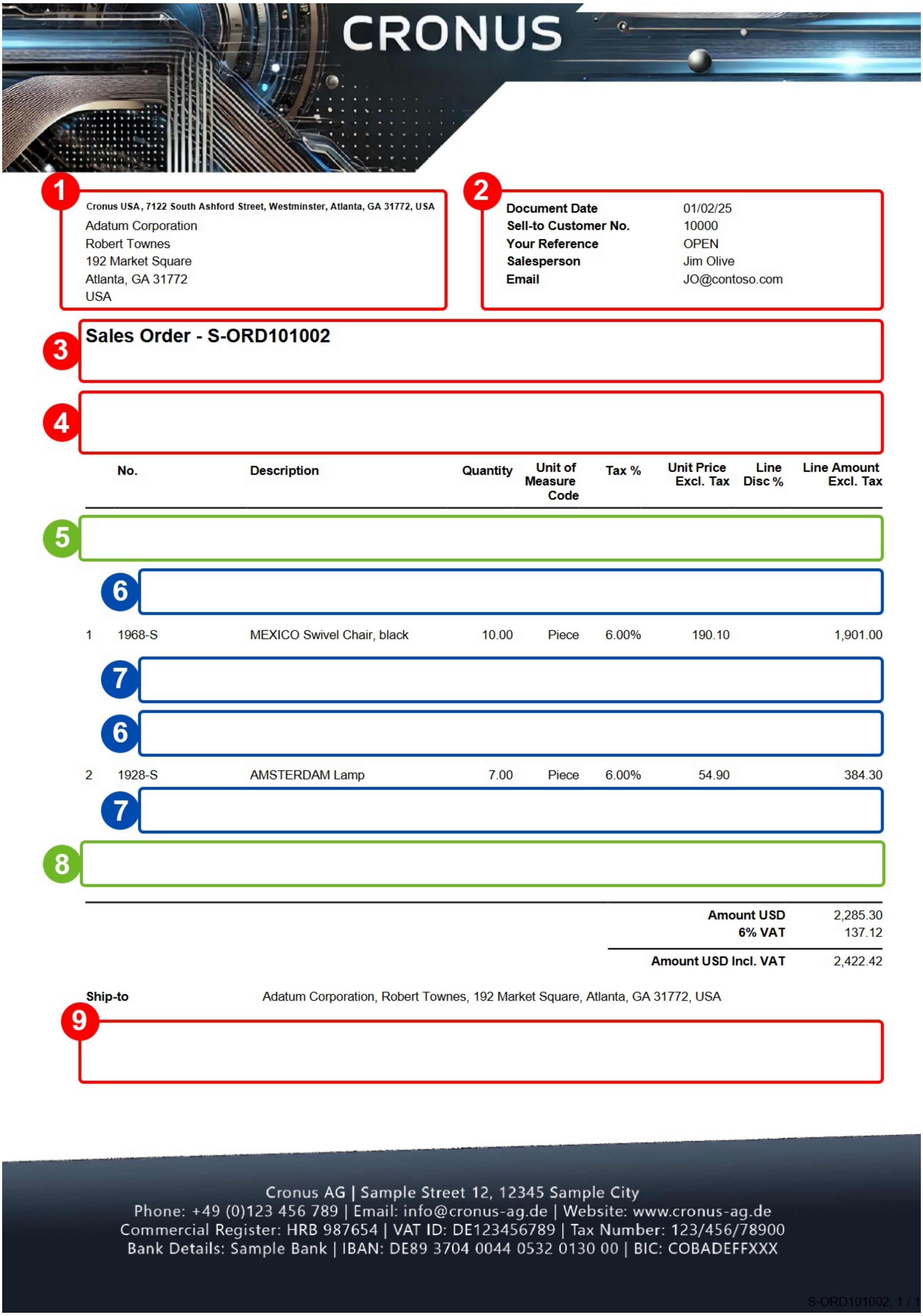
> **NOTE**
>
> Note that this way of adding text to the report does not support more than 80 characters per line. If you want to use a text that contains more than 80 characters, you must therefore either divide the text into correspondingly short sections per line or add the text to the report using rich text. For more information on rich texts and their extended functions, see the section Add Rich Text to Report.
>
> [!INOTE]
> When using text lines, you have additional options in addition to the pure text form, such as the use of placeholders, which are automatically replaced in the continuous text with field values from the report. Further information on placeholders and their use can be found in the section Add Placeholder to Text Line.
>
> [!INOTE]
> You can store translations for standard texts and field captions in the system. When selecting the report recipient, the corresponding language version of the text/field label is automatically inserted into the report. For more information on translations, see the section Add Translation for Text Line or Add Translation for Field Caption.

To add a line of text to the report, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select the corresponding report in the list and click on the value under the **ID** column in the report line.
5. The report card is displayed.



6. Under the **Fields** tab, select the layout area in which you would like to add a line of text. In the following figure, you can identify the individual areas by number. In this example, text lines are added between the report name (here sales order) and the report lines in the **Top**(**3**) layout area.
   - **1**: **Top Left**
   - **2**: **Top Right**
   - **3**: **Top**
   - **4**: **Top Columns**
   - **5**: **Before Lines**
   - **6**: **Before Line**
   - **7**: **After Line**
   - **8**: **After Lines**
   - **9**: **Bottom**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1

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Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772
USA

2

Document Date	01/02/25
Sell-to Customer No.	10000
Your Reference	OPEN
Salesperson	Jim Olive
Email	JO@contoso.com

3

Sales Order - S-ORD101002

4

	No.	Description	Quantity	Unit of Measure Code	Tax %	Unit Price Excl. Tax	Line Disc %	Line Amount Excl. Tax
1	1968-S	MEXICO Swivel Chair, black	10.00	Piece	6.00%	190.10		1,901.00
2	1928-S	AMSTERDAM Lamp	7.00	Piece	6.00%	54.90		384.30

5

6

7

6

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8

Amount USD	2,285.30
6% VAT	137.12
Amount USD Incl. VAT	2,422.42

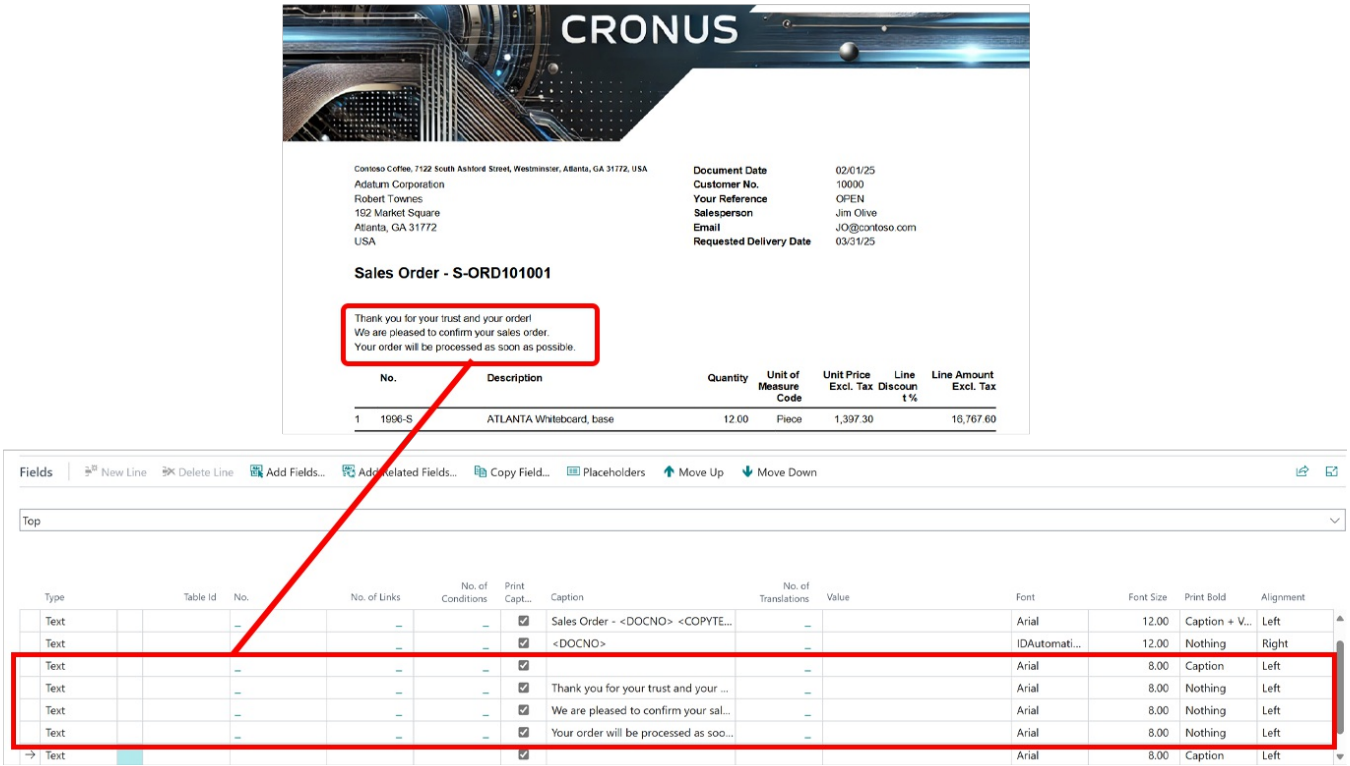
Ship-to Adatum Corporation, Robert Townes, 192 Market Square, Atlanta, GA 31772, USA

9

Cronus AG | Sample Street 12, 12345 Sample City
Phone: +49 (0)123 456 789 | Email: info@cronus-ag.de | Website: www.cronus-ag.de
Commercial Register: HRB 987654 | VAT ID: DE123456789 | Tax Number: 123/456/78900
Bank Details: Sample Bank | IBAN: DE89 3704 0044 0532 0130 00 | BIC: COBADEFFXXX

S-ORD101002, 1 / 1

7. Select the **Top** area.
8. Insert a new line with the value **Text** under the **Type** column in the **Fields** area.
9. Enter the text for the text line under the **Caption** column. As already mentioned above, the standard text function only allows 80 characters, so you must split the text into several text lines if necessary.
10. Change the value in the **Print Bold** column from **Caption** to **Nothing**.



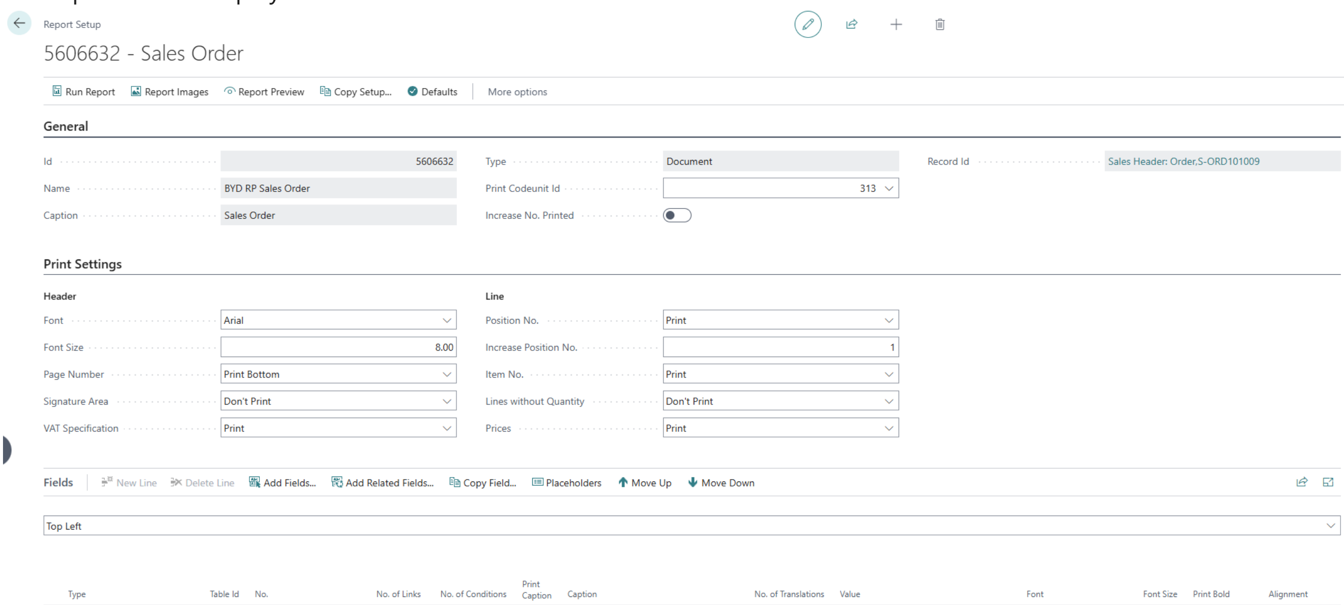
You have added a line of text to a layout area. You can move the individual text lines by proceeding as described in the section Move Field in Report. Placeholders can be used in these text lines to place report-specific field values in the text lines. Further information on placeholders and their use can be found in the section Add Placeholder to Text Line.

Add Placeholder to Text Line

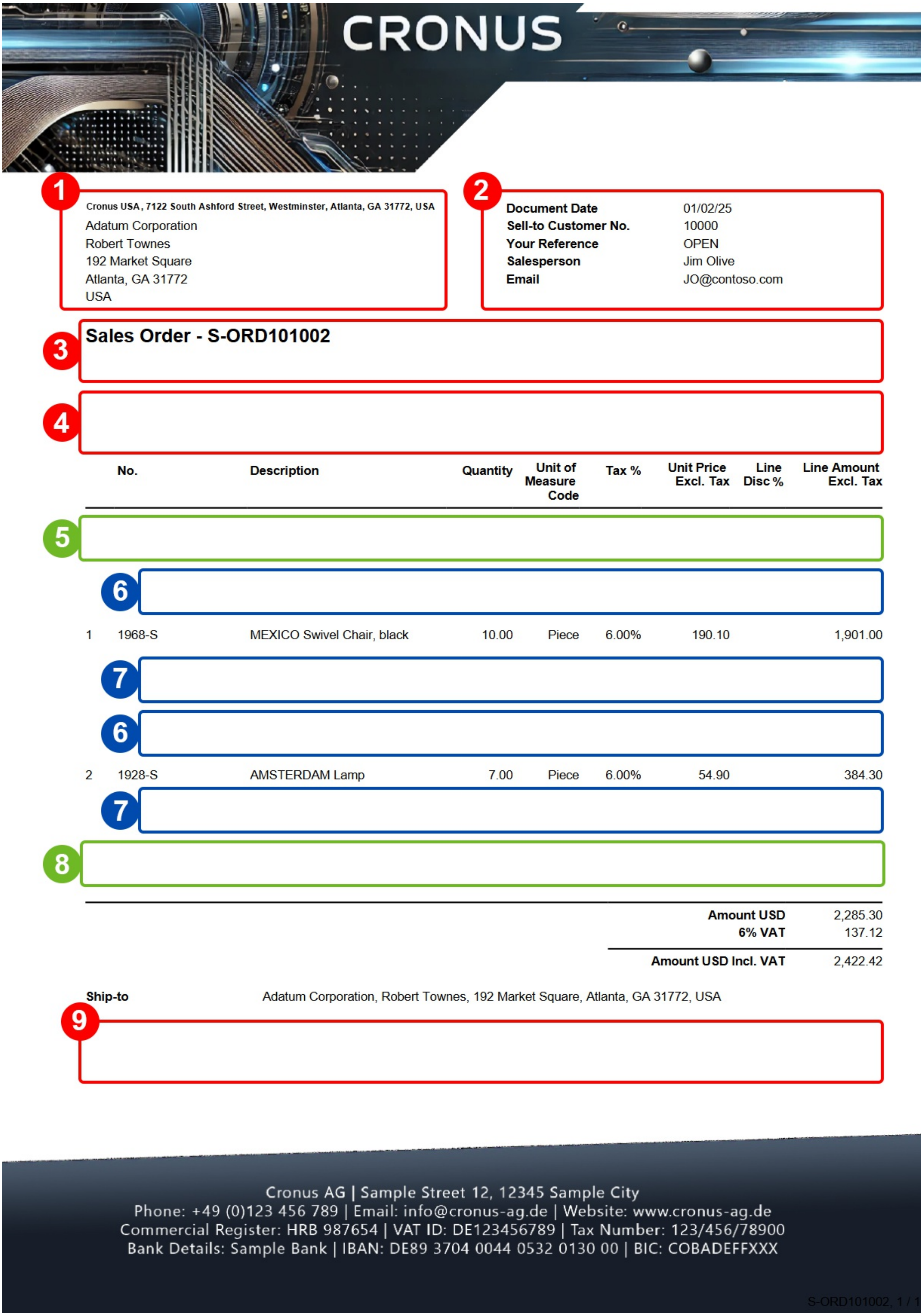
This section describes how to add a placeholder to a text line. Placeholders can reference any field value from the report, for example the customer reference (field **Your Reference, ID: 11**) or the delivery date (field **Requested Delivery Date, ID: 5790**) for the document.

To use a placeholder in a text line in the report, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select the corresponding report in the list and click on the value under the **ID** column in the report line.
5. The report card is displayed.



6. Under the **Fields** tab, select the layout area in which you would like to add a placeholder in a text line. In the following figure, you can identify the individual areas by number. In this example, a placeholder is added in a text line between the report name (here sales order) and the report lines in the **Top**(**3**) layout area.
   - **1**: **Top Left**
   - **2**: **Top Right**
   - **3**: **Top**
   - **4**: **Top Columns**
   - **5**: **Before Lines**
   - **6**: **Before Line**
   - **7**: **After Line**
   - **8**: **After Lines**
   - **9**: **Bottom**



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Atlanta, GA 31772
USA

Document Date	01/02/25
Sell-to Customer No.	10000
Your Reference	OPEN
Salesperson	Jim Olive
Email	JO@contoso.com

Sales Order - S-ORD101002

	No.	Description	Quantity	Unit of Measure Code	Tax %	Unit Price Excl. Tax	Line Disc %	Line Amount Excl. Tax
1	1968-S	MEXICO Swivel Chair, black	10.00	Piece	6.00%	190.10		1,901.00
2	1928-S	AMSTERDAM Lamp	7.00	Piece	6.00%	54.90		384.30

Amount USD	2,285.30
6% VAT	137.12
Amount USD Incl. VAT	2,422.42

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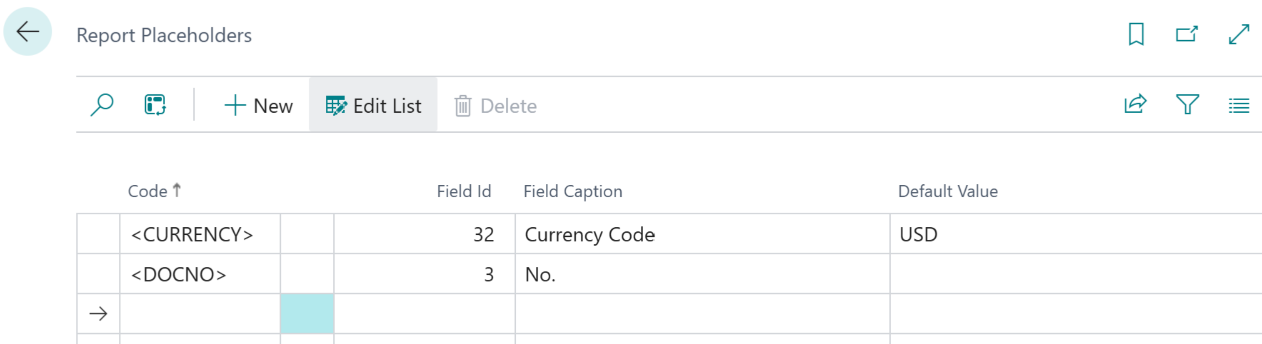
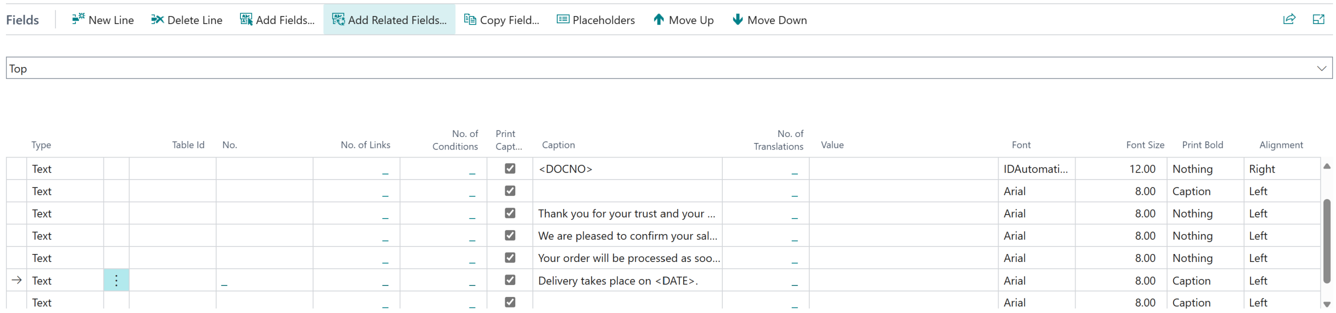
Phone: +49 (0)123 456 789 | Email: info@cronus-ag.de | Website: www.cronus-ag.de
Commercial Register: HRB 987654 | VAT ID: DE123456789 | Tax Number: 123/456/78900
Bank Details: Sample Bank | IBAN: DE89 3704 0044 0532 0130 00 | BIC: COBADEFFXXX

S-ORD101002, 1 / 1

7. Select the **Top** area.
8. Click on the **Placeholder** option in the menu bar.
9. The **Report Placeholders** window opens.



10. Click in the **Code** column and enter the code for the placeholder. We recommend enclosing the code in brackets with a special character (e.g. **<REFERENCE>**).
11. Under the **Field ID** column, select the field whose field value is to be added to a text line using the placeholder. For example, this can be the customer reference (field **Your reference, ID: 11**) or the delivery date (field **Requested Delivery Date, ID: 5790**).
12. The value in the **Field Caption** column is updated by the system.
13. You can define a default value for the placeholder under the **Default value** column.
14. To use the placeholder in the text line, enter the placeholder code in the body text.



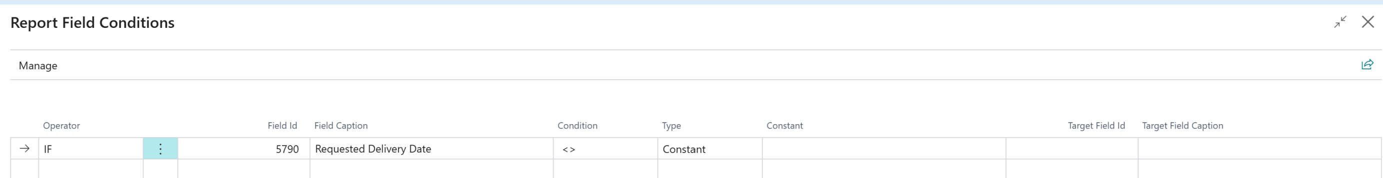
You have created a placeholder and used it in a line of text. **Beyond ReportsV2** automatically replaces the placeholder with the referenced specific field value in the report.

NOTE

Please note that no formulas can be entered when specifying the default value for a placeholder. Formulas (today + 5 days) cannot be used. You must specify a constant as the default value.

NOTE

Please note that placeholders can only reference field values and insert them into texts if the referenced field has a field value. If no field value is entered, the text line is still printed. However, you can use a condition to prevent the text line from being printed. To do this, you must define under the text line in the **No of Conditions** column that the text line is only printed if the field contains a value. The condition must be defined as follows: **Selected field** for the placeholder **Equal to** Constant **Blank**.

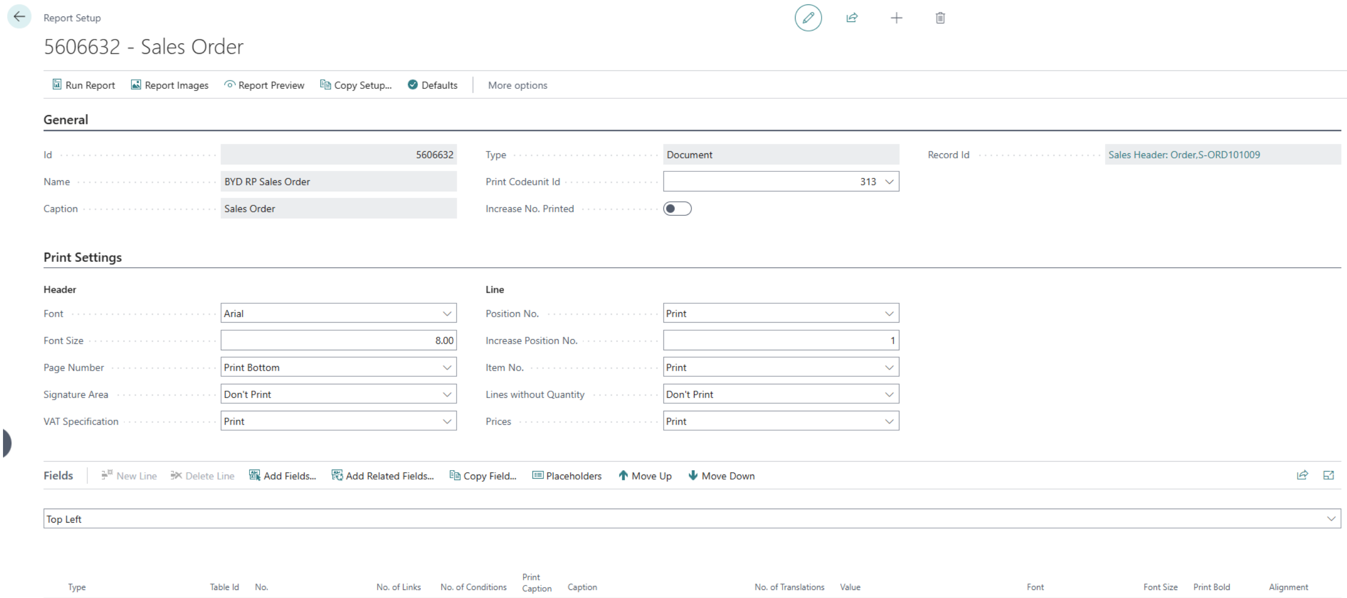


Add Translation for Text Line

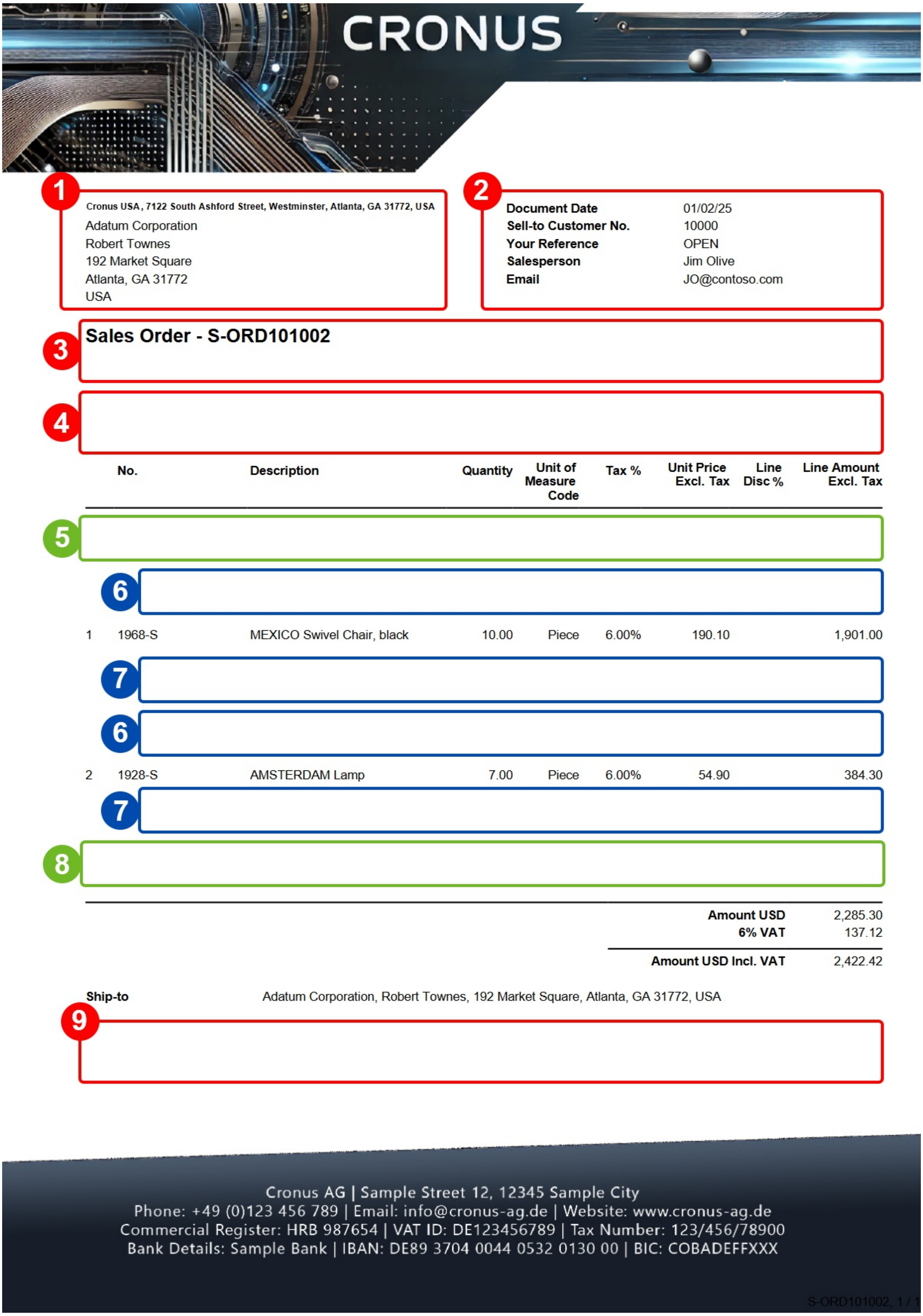
This section describes how to add a translation for a line of text. Please note that you must maintain a translation for each line of text that you have added in accordance with these instructions. We recommend using rich texts for longer texts. For more information on this text type, see the section Add Rich Text to Report.

To add a translation for a line of text, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select the corresponding report in the list and click on the value under the **ID** column in the report line.
5. The report card is displayed.



6. Under the **Fields** tab, select the layout area in which you would like to add a translation for a line of text. In the following figure, you can identify the individual areas by number. In this example, a translation is added for a text line in the **Top**(**3**) layout area.
   - **1**: **Top Left**
   - **2**: **Top Right**
   - **3**: **Top**
   - **4**: **Top Columns**
   - **5**: **Before Lines**
   - **6**: **Before Line**
   - **7**: **After Line**
   - **8**: **After Lines**
   - **9**: **Bottom**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Adatum Corporation
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192 Market Square
Atlanta, GA 31772
USA

2

Document Date	01/02/25
Sell-to Customer No.	10000
Your Reference	OPEN
Salesperson	Jim Olive
Email	JO@contoso.com

3

Sales Order - S-ORD101002

4

	No.	Description	Quantity	Unit of Measure Code	Tax %	Unit Price Excl. Tax	Line Disc %	Line Amount Excl. Tax
1	1968-S	MEXICO Swivel Chair, black	10.00	Piece	6.00%	190.10		1,901.00
2	1928-S	AMSTERDAM Lamp	7.00	Piece	6.00%	54.90		384.30

5 6 7 6 7 8

Amount USD	2,285.30
6% VAT	137.12
Amount USD Incl. VAT	2,422.42

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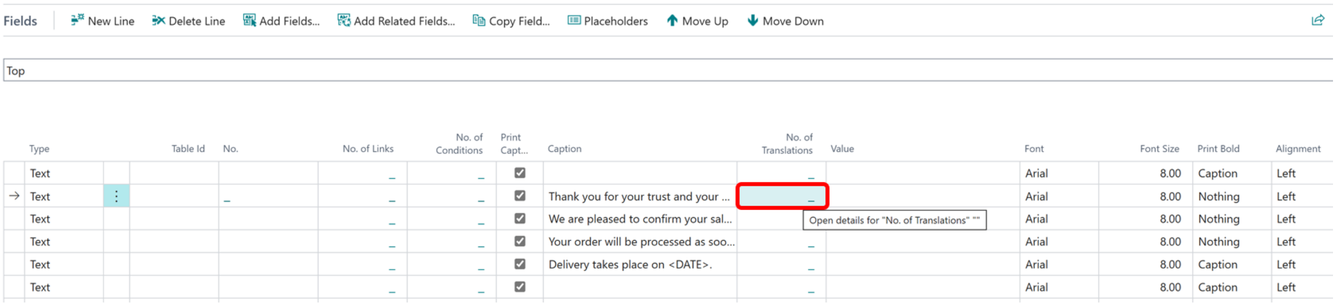
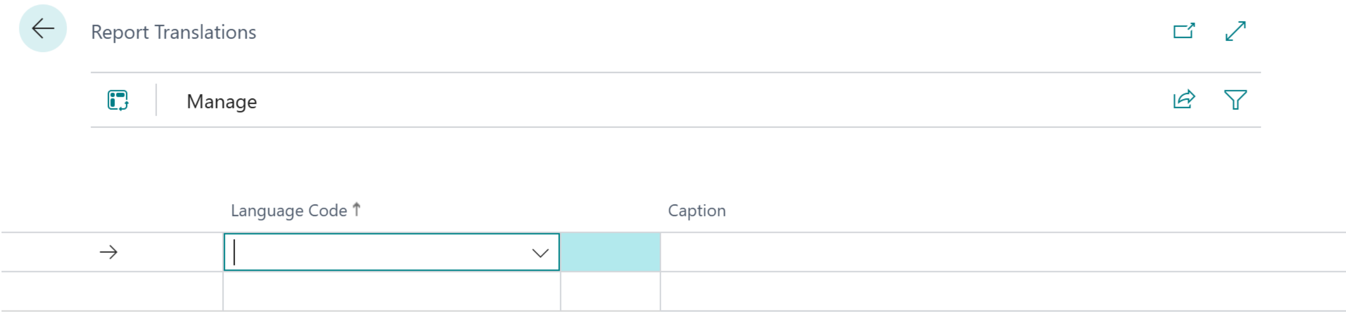
Bank Details: Sample Bank | IBAN: DE89 3704 0044 0532 0130 00 | BIC: COBADEFFXXX

S-ORD101002, 1 / 1

7. Select the **Top** area.
8. Click in the line for the corresponding text line in the **No. of Translations** column.



9. The **Report Translations** window is displayed.



10. Under the **Language Code** column, enter the language in which you want to store the translation for the text line.
11. Enter the translation of the text line under the **Caption** column.

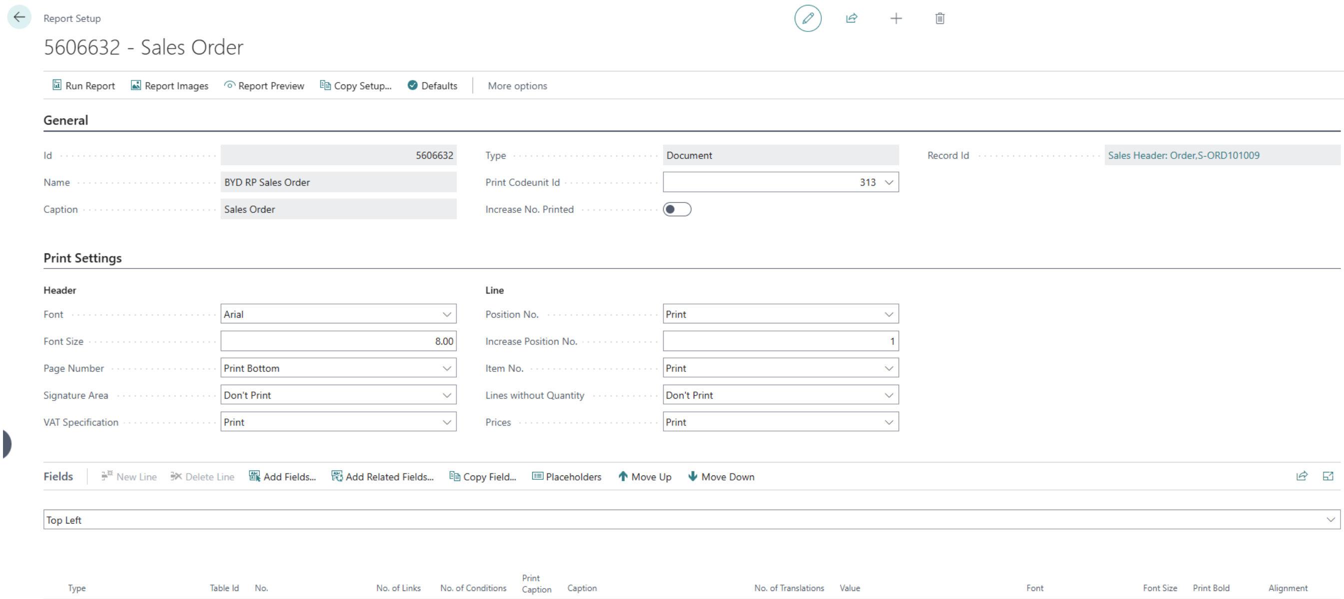
You have added a translation for a line of text.

Add Seasonal Text to Report

This section describes how to add a seasonal text to a report. Seasonal texts are used in **Beyond ReportsV2** to display a text only within a specific time period.

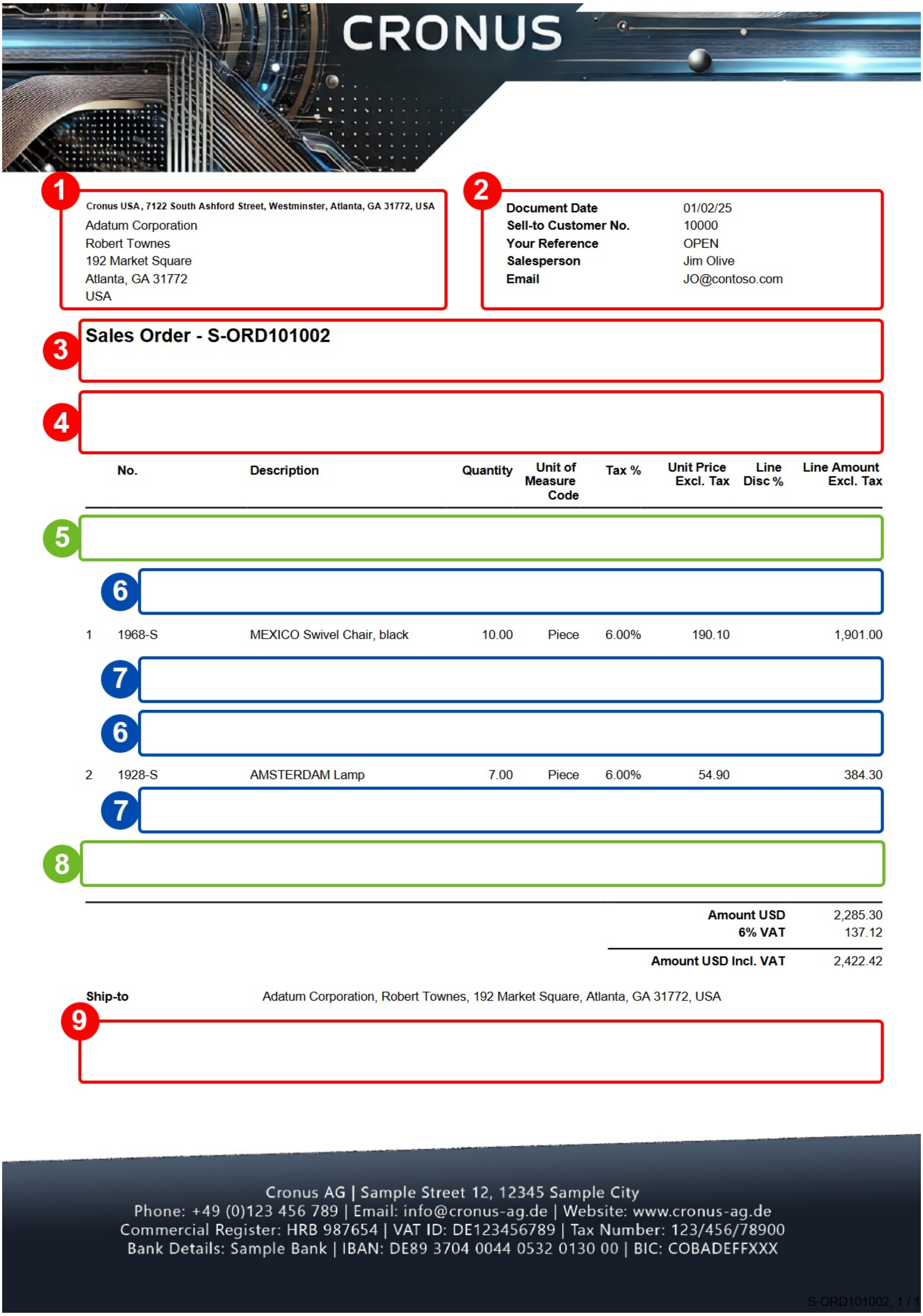
To create a seasonal text and add it to a report, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select the corresponding report in the list and click on the value under the **ID** column in the report line.
5. The report card is displayed.



6. Under the **Fields** tab, select the layout area in which you would like to add a seasonal text. In the following figure, you can identify the individual areas by number. In this example, a seasonal text for the end of the year is added in the **Bottom** (**9**) layout area.

- **1**: **Top Left**
- **2**: **Top Right**
- **3**: **Top**
- **4**: **Top Columns**
- **5**: **Before Lines**
- **6**: **Before Line**
- **7**: **After Line**
- **8**: **After Lines**
- **9**: **Bottom**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Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772
USA

2

Document Date	01/02/25
Sell-to Customer No.	10000
Your Reference	OPEN
Salesperson	Jim Olive
Email	JO@contoso.com

3

Sales Order - S-ORD101002

4

	No.	Description	Quantity	Unit of Measure Code	Tax %	Unit Price Excl. Tax	Line Disc %	Line Amount Excl. Tax
1	1968-S	MEXICO Swivel Chair, black	10.00	Piece	6.00%	190.10		1,901.00
2	1928-S	AMSTERDAM Lamp	7.00	Piece	6.00%	54.90		384.30

5

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Amount USD	2,285.30
6% VAT	137.12
Amount USD Incl. VAT	2,422.42

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Cronus AG | Sample Street 12, 12345 Sample City
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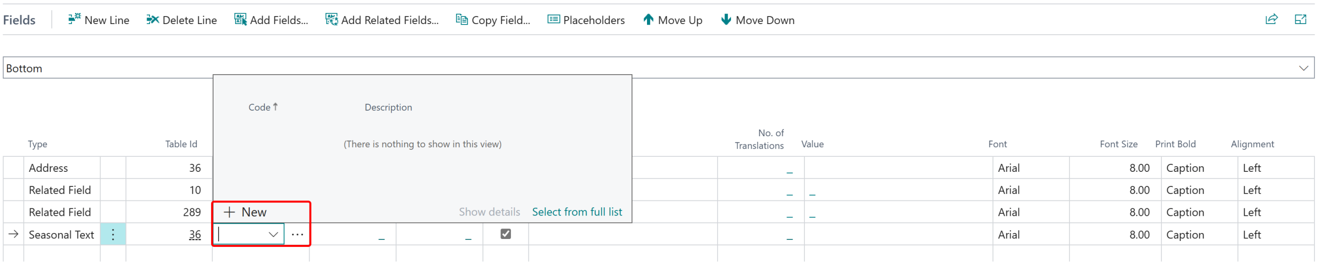
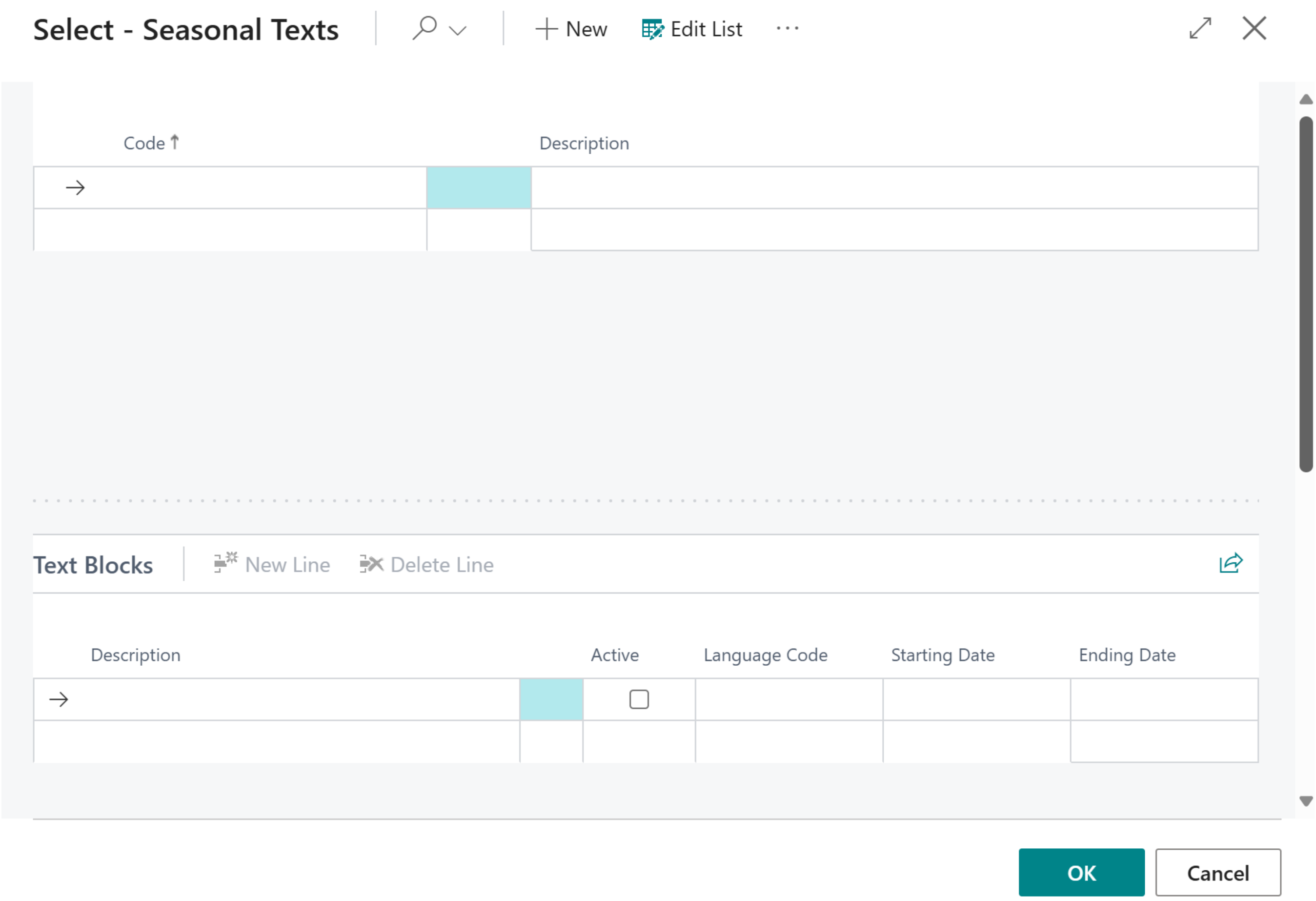
S-ORD101002, 1 / 1

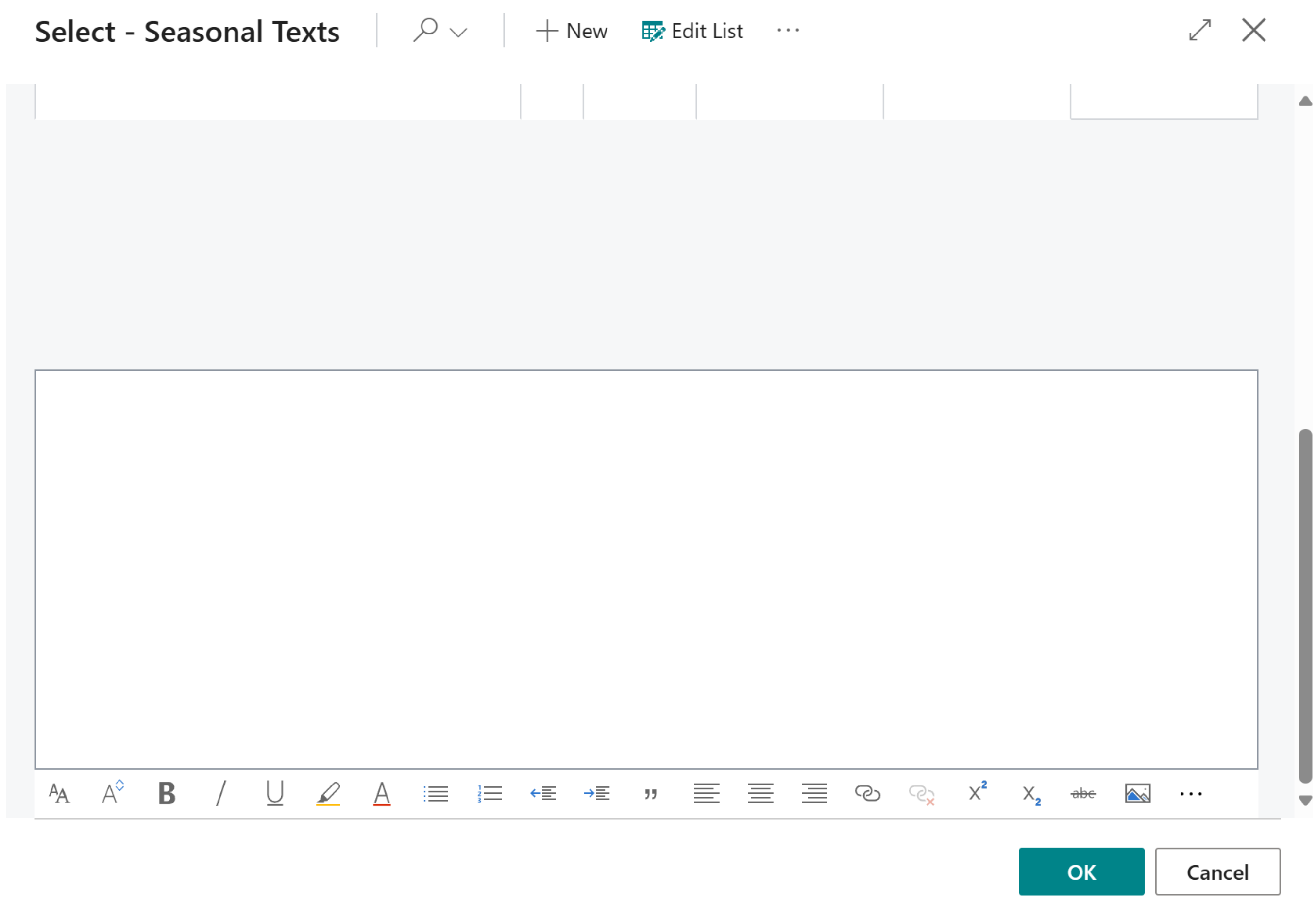
7. Click in the **Fields** area in a new line and select the **Seasonal Text** value under the **Type** column.
8. In the **No.** column, click in the input field and select the **New** option.



9. The **Select - Seasonal texts** window is displayed.



10. Enter a code for the seasonal text in the **Code** column.
11. Enter a description for the seasonal text under the **Description** column.
12. Activate the checkbox under the **Active** column.
13. Enter the appropriate language code for the text under the **Language Code** column.
14. Under the **Starting Date** column, define the date from which the seasonal text is to be printed in the reports.
15. Under the **Ending Date** column, define the date from which the seasonal text should no longer be printed in the reports.
16. Scroll down and click in the text input field.



17. Enter the continuous text for the seasonal text and click **OK**. The following options are available for the design:

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 a seasonal text and added it to the report.

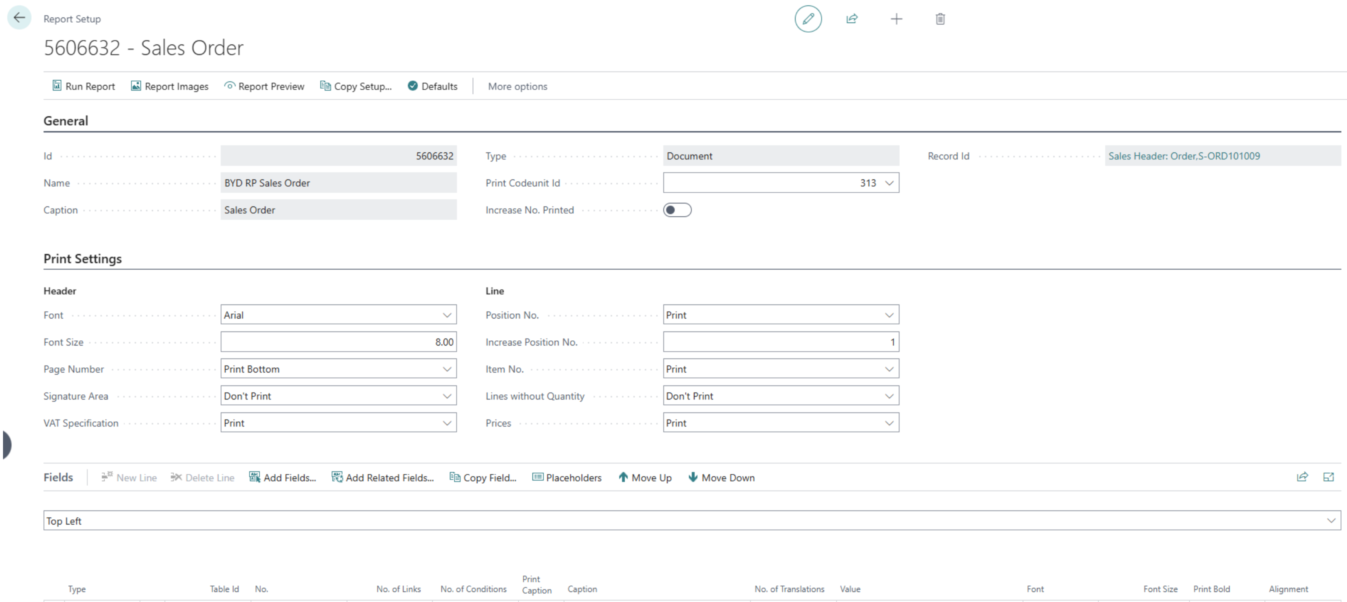
Add Rich Text to Report

This section describes how to add a rich text to the report. Please note that rich texts can only be used if you have installed and licensed the **Beyond RichText** app.

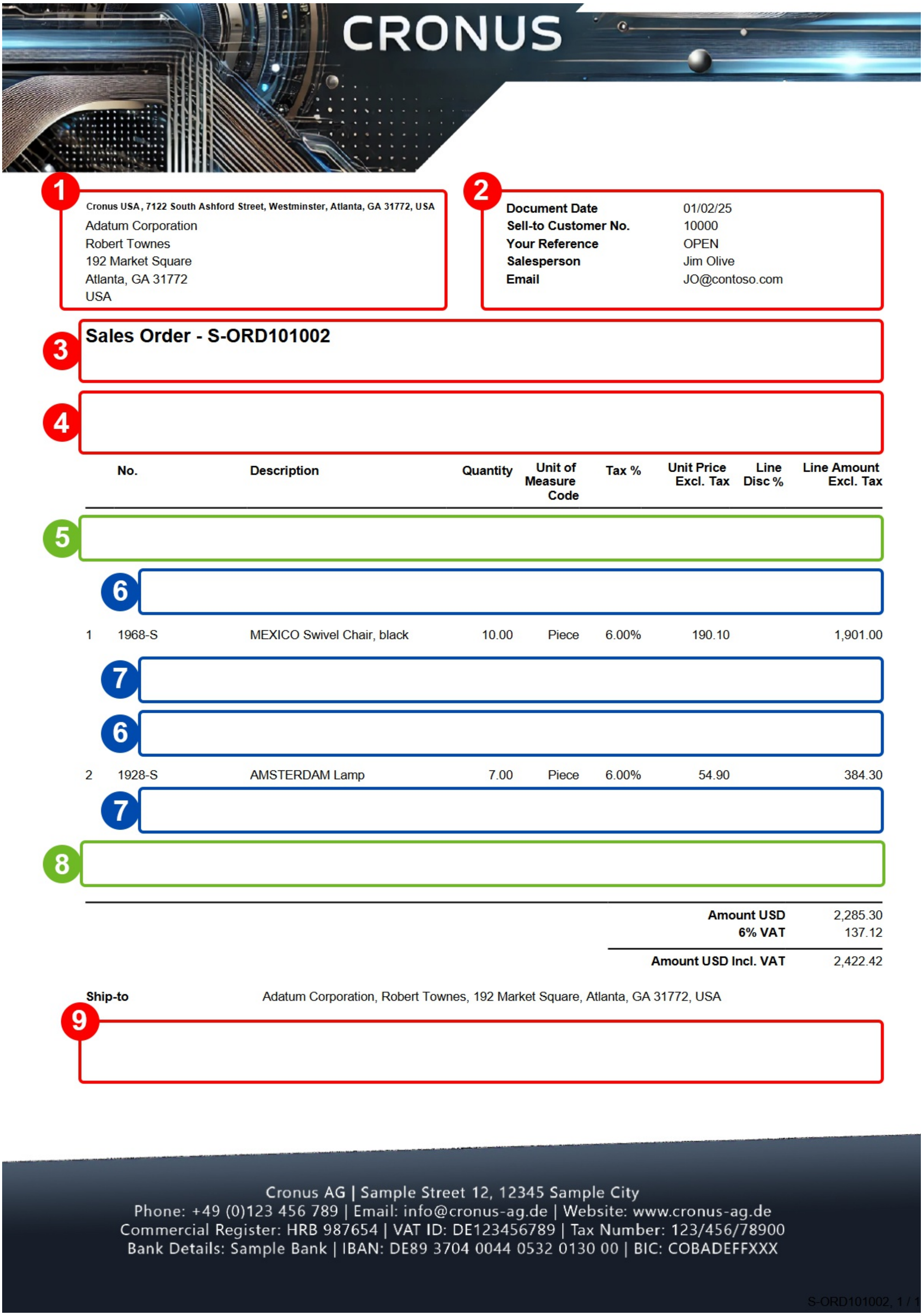
For the following description, we assume that the **Beyond RichText** app is installed and licensed, and that rich text types and rich text templates have already been created. For more information on how to create rich text types and templates, please refer to the corresponding documentation for **Beyond RichText**.

To use a rich text in a report, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select the corresponding report in the list and click on the value under the **ID** column in the report line.
5. The report card is displayed.



6. Under the **Fields** tab, select the layout area to which you want to add the rich text. In the following figure, you can identify the individual areas by number.
   - **1**: **Top Left**: *This layout area is located at the top left of the report and is primarily used as the address area. For more information on setting the address, please refer to the section Edit Report Address Format.*
   - **2**: **Top Right**: *This layout area is located at the top right of the report and is primarily used to display additional information relevant to the report.
   - **3**: **Top**: *This layout area is located in the report below the address area and the report information.
   - **4**: **Top Columns**: **This layout area is located in the report above the column headers for the report lines.
   - **5**: **Before Lines**: _This layout area is located **before*_ all report lines.
   - **6**: **Before Line**: _This layout area is located before each report line. Please note that this layout area is repeated ***per line*._
   - **7**: **After Line**: _This layout area is located after each report line. Please note that this layout area is repeated ***per line*._
   - **8**: **After Lines**: _This layout area is located **after*_ all report lines.*
   - **9**: **Bottom**: *This layout area is located at the bottom of the report.*


CRONUS

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Document Date	01/02/25
Sell-to Customer No.	10000
Your Reference	OPEN
Salesperson	Jim Olive
Email	JO@contoso.com

3

Sales Order - S-ORD101002

4

	No.	Description	Quantity	Unit of Measure Code	Tax %	Unit Price Excl. Tax	Line Disc %	Line Amount Excl. Tax
1	1968-S	MEXICO Swivel Chair, black	10.00	Piece	6.00%	190.10		1,901.00
2	1928-S	AMSTERDAM Lamp	7.00	Piece	6.00%	54.90		384.30

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Amount USD	2,285.30
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9

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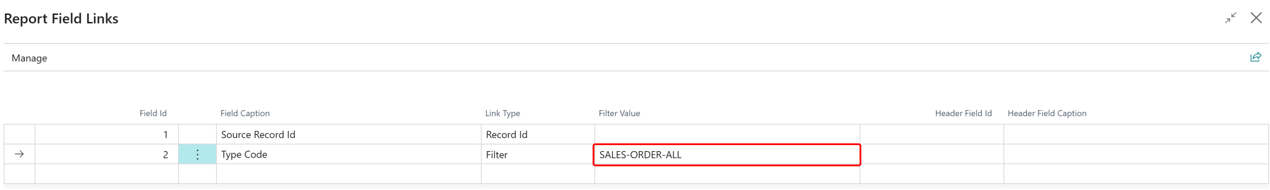
S-ORD101002, 1 / 1

Other selectable areas such as **Line**, **Totals** and **VAT Specification** are reserved by the system and cannot be edited. If you want to hide the **VAT Specification** report area, you will find the corresponding setting in the Define Print Settings section.

7. In our example, we select the layout area **Top** (3).
8. Click in a new row under the **Fields** area and select the value **Related field** under the **Type** column.

9. Click in the **Table ID** column and enter the value **5606705** (**BYD RT Rich Text Data**).
10. Click in the **No.** column and enter the value **10** (**Rich text data**).
11. Click in the **No. of Links** column.
12. The **Report Field Links** window is displayed.
13. Define the following lines in the **Report Field Links** window:
    - **Field ID**: 1, **Field Caption**: Source Record ID, **Link Type**: Record ID
    - **Field ID**: 2, **Field Caption**: Type Code, **Link Type**: Filter, **Filter Value**: Code of the rich text template that you want to include



14. Close the **Report Field Links** window.
15. Deactivate the checkbox for the rich text line under the **Print Caption** column.

You have added a rich text to a report.

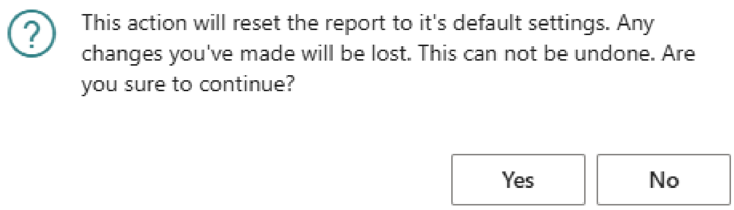
Reset Report Setup

This chapter describes how to reset a report setup.

> **NOTE**
>
> **Caution**
> The following instructions describe how to delete all changes made by you or third parties to a report setup. Individual adjustments to the font, font size, print settings (item number, page numbers, print prices, etc.) are deleted. This process cannot be undone.

To reset the adjustments to a report in **Beyond ReportsV2** back to the default settings, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Report Setups** and click on the corresponding search result.
3. The **Report Setups** page is displayed.
4. Select the report from the list of available reports.
5. Click on the **Restore Defaults** option in the menu bar.
6. A dialog window is displayed.



7. If you want to reset the settings for the report to the default values of **Beyond ReportsV2**, confirm the dialog window by clicking the **Yes** button.

You have reset the report settings to the default settings. All individual customizations for this report have been deleted.