



Documentation: **Dynavision Layouts**

Document version: 28.0.1

Date: 7/10/2026

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1 Introduction

Welcome to the official manual of the Dynavision Layouts module.

The Dynavision Layouts module is developed with the goal of creating universal Layouts that are customizable using setup within Business Central rather than setting up specific customization for the customer.

The fixed grid-system makes it possible to choose which information is displayed in which columns of the grid and how this information is marked up. It also gives the option to insert variables and text constants.

This means it is possible to show any data from within Business Central and even add extra fields.

2 Installation

2.1 Extension

The Dynavision Layouts module is a separate Business Central extension.

1. Choose the search icon, enter **Extension Management**, and then choose the related link.
2. Choose **Manage** in the Action bar on the page and choose action **Extension Marketplace**.
3. In the search bar, enter **Dynavision Layouts** and install this app.
4. Activate the trial as described in following [Get Started guide](#).

2.2 Get Default Data

Using the action **Get Default Data** on the **Report Layout Setup** page, the report layouts that are configured in Dynavision can be fetched and can be used as starting point to edit and configure the report layouts.

3 Dynavision layouts application

3.1 Save Signatures on sales/service documents

Dynavision Trade makes it possible to add signatures to sales/service quotes, sales/service orders and posted sales/service shipments.

3.1.1 Add signature possibility to sales documents.

3.1.1.1 Sales & Receivables Setup/Service Management Setup

By default, the signature option is not shown on sales documents. This needs to be enabled in the Setup page first.

1. Choose the search icon, enter **Sales & Receivables Setup**, then choose the related link.
 - a. For enabling the option in service documents, navigate to the **Service Management Setup** page.
2. In the section **General**, enable the option **Enable Signature**.

3.1.2 Usage on documents

1. Navigate to the sales/Service document on which the signature needs to be registered.
 - a. This is possible on the desktop version, as well as the mobile version of Business Central.
2. Search for the **Add Signature** section on the opened document.
 - a. **Signed**
Indicates if a signature is already added on the document. If a signature is already saved, this can be seen in the factbox **Signature**.
 - b. **Signature Name**
(Optionally) adds the name of the person that signed to the factbox and to printouts of the document if the option is enabled on the report layout setup.
 - c. **Signature Canvas**
In this canvas, the signature can be added by the user.
 - d. **Clear**
Use this action to clear the canvas.
 - e. **Sign**
Use this action to save the signature in the document. This will update the signature in the factbox of the document.
3. The signature will also be transferred to the **Posted Sales/Service Shipment** when this is posted.
4. If a service/sales quote is transformed to an order, the signature will also be transferred to the newly created order.

3.1.3 Archived documents

The signature that was registered will also be transferred to archived versions that are created of the document.

This is visible in the factbox in the archived version.

3.2 Report Layout Setup

In order to make it possible to configure and customize the reports that will be printed in Business Central, new reports have been created to which all layouts have been attached. The customization and configuration of these layouts can be performed on the **Report Layout Setup** page.

Use the action **Get Default Data**, to fetch the report layout setup cards that are already set up by Dynavision. These can be edited where needed.

1. Choose the search icon, enter **Report Layout Setup**, and then choose the related link.
2. Choose the report that has to be configured/customized. *All reports within this module can be found under the prefix "ESCR."*
3. **General tab**
 - a. **Report ID**
The ID of the report that generates the layout. Here a Report ID can be selected.
 - b. **Report Caption**
The Caption of the selected Report ID.
 - c. **Description**
The description of the selected Report. This field can be used to describe the function of the report version in case different versions of the report are set up.
 - d. **Version**
Allows to specify a different report layout setup for the same report. These versions can be used when printing the layout by selecting this version in the report selection field.
 - e. **Font**
The font in which the document needs to be printed. A text value that can be inserted. *E.g. Helvetica or Times New Roman.*
The available fonts can be found by choosing following [link](#) or by selecting the three dots that are visible in the field when the page is in edit mode.
 - f. **Theme color**
Using a color scale, select the color that needs to be used in order to print the title and the separators of the header elements on the layout.
 - g. **Print page number**
Specifies if where the page number should be printed. The options are blank (not printed), footer or header.

h. Page number alignment

Specifies how the page number should be aligned. The options are left, right and center.

Remark: the page number can only be configured if the Line Definition RDL is printed for the report.

i. Page number format

Specifies the format of the page number. User %P for the current page number and %T for the total number of pages. E.g. P %P/%T.

Remark: the page number can only be configured if the Line Definition RDL is printed for the report.

j. Barcodes

This feature allows barcodes to be printed on the layout. This feature is part of the Dynavision Connect module.

i. Barcode Type

Specifies whether to use one-dimensional or two-dimensional barcode fonts.

When **1D Barcode is selected**, the one-dimensional barcode can be chosen in field **Barcode Symbology 1D**.

A one-dimensional barcode can be:

- Code-39,
- Codabar,
- Code-128,
- Code-93,
- Interleaved 2 of 5,
- Postnet,
- MSI,
- EAN-8,
- EAN-13,
- UPC-A, and
- UPC-E.

When **2D Barcode is selected**, the two-dimensional barcode can be chosen in field **Barcode Symbology 2D**.

A two-dimensional barcode can be:

- Aztec,
- Data Matrix,
- Maxi Code,
- PDF417, and
- QR-Code.

ii. Text below barcode

Specifies if the barcode text should be printed below the barcode.

4. Addresses tab

a. Top-Left, Bottom-Left and Top-Right

i. Text Block

A text block can be selected that will be used when printing the address information. The use of text blocks makes it possible to customize the layout even further. How text blocks can be configured can be found in the **Connect Manual**.

Remark: Either text blocks are used in all Address blocks, or no text blocks are used.

ii. Address

Select where the information can be found that needs to be printed in the top-left space in the layout. There are a few options to choose from.

- Empty (*no information printed*),
- Company Address,
- Ship-to Address,
- Sell-To Address,
- Bill-To Address,
- Responsibility Center,
- Pay-To Address,
- Buy-From Address,
- Transfer-From Address,
- Transfer-To Address,
- POS Terminal, and
- Location Address.

iii. Address Title

Specifies the title above the top-left address block. A **Text Constant** can be used with translations in order to print the correct title on the layout when it is printed in a different language. The creation of text constants is discussed in chapter...

5. Header tab

a. Document Title

Allows you to assign a text constant that will be printed as the title of the document. This title will also be translated if the translations are set to the assigned text constant.

b. Document title Position

Here the position can be selected where the title will be printed on the document. The options are:

- i. At logo,
- ii. Above Address info,
- iii. Above header info, and
- iv. No title.

c. Document title alignment

Specifies the alignment of the document title.

Remark: *this is only applied when the Document title position is set to something other than At logo.*

When the barcode is also printed, it is aligned on the opposite side of the title (e.g. title aligned left; barcode will be printed right).

d. Logo Source

Specifies the location from which the logo needs to be retrieved.

The options are:

- i. Company Information,
- ii. Resp. Center, and
- iii. POS Terminal.

Remark: *when adding a picture to be printed on the layouts, make sure that the resolution/file size of the image is no larger than 150Kb. Otherwise the performance of the generation of the layouts will be impacted and can be significantly slower.*

e. Logo position

Where the logo should be printed.

The options are:

- i. No logo,
- ii. Left,
- iii. Right, and
- iv. Center.

f. Header Text

The text constant that needs to be displayed in the header of the document can be selected.

g. Barcode Field

Specifies the field that will be printed as a barcode on the document header.

The position follows the document title position.

If the option "at logo" is selected, the barcode will be printed opposite the logo when left or right is selected. When center is selected, the barcode will be printed below the logo.

Remark: the **Barcode Symbology 1D** must be filled in for the barcode to be printed.

Remark: *this is only available in the Line Definition (RDL) reports.*

h. Barcode Field Caption

Specifies the caption that will be printed below the barcode on the document.

Remark: the field caption will only be printed if the option Text below barcode is enabled.

Remark: *this is only available in the Line Definition (RDL) reports.*

i. Print Work description

If enabled, the work description of the order will be printed.

j. Print Pop-Up Comments

Allows any pop-up comments set on the Customer or Vendor Card (*Related > Customer/Vendor > Pop-Up Comments*) to be printed along with the layout.

This feature is part of the Dynavision Trade module.

k. Header Alignment Vertical

Specifies if the header is aligned vertically instead of horizontally.

If enabled, the possible number of header fields that can be printed is 16. If this is disabled, only 6 fields can be printed.

6. Header Fields tab – Horizontally aligned

a. Column 1 to column 6

If the header alignment is set to horizontally, column 1 to column 6 will be displayed and will be configurable.

i. Information on Line 1

Specifies the title that will be printed above the header field. A **text Constant** can be used with translations in order to print the correct title on the layout when it is printed in a different language.

Header fields		
Column 1	Column 2	Column 3
No.	Bill-to Customer No.	Order Date
→ [No.]	[Bill-to Customer No.]	[Order Date]

ii. Information on Line 2

Specifies the field from which the information needs to be printed.

Header fields		
Column 1	Column 2	Column 3
No.	Bill-to Customer No.	Order Date
→ [No.]	[Bill-to Customer No.]	[Order Date]

7. Header Fields tab – Vertically aligned

a. Column 1 to column 4

If the header alignment is set to vertically, column 1 to column 4 is shown, and 16 header fields can be configured, printed in 2 columns.

All rdl layouts (with line definition support) have been extended to supported the 10 extra fields (in vertical mode)

In addition, the transfer order / reminder layouts have been extended too (as these did not have a line definition rdl equivalent).

i. Column 1 and Column 3

Specifies the title that will be printed above the header field. A **text Constant** can be used with translations in order to print the correct title on the layout when it is printed in a different language.

Header fields			
Column 1	Column 2	Column 3	Column 4
No.	[No.]	Due Date	[Due Date]
→ Bill-to Customer No.	[Bill-to Customer No.]	Your Reference	[Your Reference]
Order Date	[Order Date]	Amount Including VAT	[Amount Including VAT]

ii. Column 2 and Column 4

Specifies the field from which the information needs to be printed.

Header fields			
Column 1	Column 2	Column 3	Column 4
No.	[No.]	Due Date	[Due Date]
→ Bill-to Customer No.	[Bill-to Customer No.]	Your Reference	[Your Reference]
Order Date	[Order Date]	Amount Including VAT	[Amount Including VAT]

8. Lines tab

a. Line Definition Code

Specifies the definition used to dynamically render the report lines content.

*Using the action **Line Definition** to quickly navigate to the Report Line*

Definition that is linked to the report.

b. Alternating Line color

Using a color scale, select the color that needs to be used to color the even lines that are printed on the layout.

Shown if no Line Definition Code is specified.

c. Draw Line in table

Specifies if lines should be drawn in the printer table of items.

Shown if no Line Definition Code is specified.

d. Print quantity 0

Specifies if lines with quantity 0 need to be printed on the layout.

Remark: *the quantity printed on the lines will be empty, instead of 0.*

e. Print Hidden Lines

When disabled, lines with **Hide on Layout** will not be printed. When enabled, all lines will be printed.

f. Print VAT in lines

Indicates whether the VAT needs to be printed on the lines in printed document.

g. Print Excise

Indicates whether the Excise is printed on the document layout.

Remark: *when this option is enabled, it is necessary to use a Report Line Definition in which the Excise fields are included. Otherwise, the Excise will not be printed.*

Available when the Dynavision Excise Duties app is installed.

h. Prioritize Item Reference

Is enabled and if the Item Reference is filled in for the item, this reference will be printed instead of the Item No. Fline def

i. Remark: the field **No.** needs to be configured in the Report Line Definition in order to print this information.

i. Print Description 2

This allows the second description of the item to be displayed on the printed document. This will be printed below the description of the item.

j. Print Item Tracking

Specifies if the item tracking information is printed on the document. This is used when lot number or serial numbers need to be displayed on the document.

- i. Click on the **3 dots** that are displayed next to the option to **configure the information to be printed** (*using a Text Block*).
- ii. **Remark:** the text block cannot be specified per report layout.

k. Print Item Attributes

Specifies how item attributes are printed on item lines.

The options are:

- i. **None:** do not print,
- ii. **Global:** use settings from item attribute, or
- iii. **Layout-specific:** use settings from item attribute per layout.

It is possible to specify the item attributes that need to be printed. This is described in the section [Print Item Attribute](#).

l. Print Weights

Specify if and where the weights will be printed on the document. The options are:

- i. Never,
- ii. Lines,
- iii. Totals, and
- iv. Lines and Totals.

m. Use Gross Weight

Indicates if the Gross weight will be printed or the Net weight that is set up in the item.

n. Weight UOM

Specifies the UOM that is used for the weight. *E.g. KG.*

9. Footer tab

a. Lines Footer Text

The text constant that needs to be displayed in the line footer of the document can be selected.

This text will be printed under the VAT summary if printed, or under the lines on the document.

b. Print VAT Summary

Indicates whether the VAT summary needs to be printed on the layout.

c. Print unit of measure totals

Specifies if the totals per unit of measure should be printed.

d. Print Signature

Specifies if the signature needs to be printed on the document.

If a name is also noted for the signature, this will also be printed on the document layout.

- i. **Remark:** *for this functionality, the option for adding signatures to documents needs to be enabled in the Sales & Receivables Setup.*
- ii. **Remark:** the option Print Signature is shown on all report layout setup pages, but only supported on the Sales Quote, Sales Order and Posted Sales Shipment layouts.

e. Signature Text

(Optionally) Specifies the text to be printed **before** the signature. This text will only be printed if the option **Print Signature** is enabled.

f. Page footer text

The text constant that needs to be printed in the footer of the document. This supports basic HTML formatting.

E.g. <p>Thank you for your trust in Dynavision;</p><p>Please make sure to pay this invoice using structured message
*F%71176650F%</p>
If you have questions, you can reach us via*
support.

Thank you for your trust in Dynavision;

Please make sure to pay this invoice using structured message +++000/2500/00726+++

If you have questions, you can reach us via [support](#).

g. Print Company Footer

Specifies if a company footer should be printed on the layout.

The footer is uploaded in the Company data, in the factbox pane, in Business Central and will be retrieved from this location in order to print.

Remark: the properties for the footer image are 2220 x 257 pixels. Horizontal and vertical resolution: 96 dpi.

Remark: the Company footer will be printed on top of the page footer.

10. Extra Options tab

a. Print Copy in Default Language

Allows you to also print a copy of the document in the default language set.

b. Print Comments

Specifies which comments are printed.

Remark: these are not the comments in the lines of the document, but the comments that are added in the **Comment Sheet** using the action **Comments** on the document.

The options are:

- i. None,
- ii. Only Header,
- iii. Only Lines, and
- iv. Header and Lines.

c. Print Payment Terms

Indicates if and where the payments terms will be printed. This uses the PAYMENTTERMS Text Constant.

Remark: these payment terms are translated only if the translations are configured.

The options are:

- i. Never,
- ii. Header, and
- iii. Footer.

d. Payment Discount Text Constant

Choose how the Payment Discount is shown in the payment terms header or footer. The default constant that is used is PMTDISCOUNTTEXT.

This constant will only be printed if the payment discount is different from 0 and is not available on service invoices.

- i. %1: Payment Discount Date;
- ii. %2: Total Amount - Payment Discount;
- iii. %3: Payment Discount;
- iv. %4: Taxable Amount.

e. Print limitation text constant

Specifies how the credit limitation is shown in the payment terms header or footer, default constant: CREDITLIMITATION.

This constant will only be printed if the Credit Limitation % is different from 0 and is not available on service invoices.

- i. %1: Credit limitation (Payment discount) Date;
- ii. %2: Credit limitation Percentage;
- iii. %3: Credit limitation Amount;
- iv. %4: Total Amount to Pay;
- v. %5: Total Amount.

f. Print Payment Method

Specifies if and where the payment method will be printed. This uses the PAYMENTMETHOD Text Constant.

The options are:

- i. Never,
- ii. Header, and
- iii. Footer.

g. Print Shipment Method

Specifies if and where the shipment method will be printed. This uses the SHIPMENTMETHOD Text Constant.

Prices

h. Print Prices

Indicates if and where the prices will be displayed on the printed document.

The options are:

- i. Never,
- ii. Lines,
- iii. Totals, and
- iv. Lines and Totals.

i. Print Discount Type

Indicates if and where the discounts will be displayed on the printed document. The options are:

- i. Not printed,
- ii. Print %, and
- iii. Recalculate unit price instead of printing %.
 - When this option is selected, the unit price will be printed with the discount already deducted. This way the correct price is printed without printing the discount percentage.

j. Print Currency Symbol

Specifies if the currency symbol needs to be printed, and if yes, where.
The options are:

- i. Never,
- ii. Lines,
- iii. Totals, and
- iv. Lines and Totals.

Remark: In case the Currency symbol needs to be printed for different currencies, make sure the Currency symbol is added to the Currencies table. Choose the search icon, enter **Currencies**, and then choose the related link. Select the Currency to which the symbol needs to be assigned and choose the action **Edit**. In the field **Symbol** enter the symbol that needs to be printed on the layout.

k. Currency Position

Specifies where the currency symbol is printed.
The options are:

- i. Before,
- ii. Before with space,
- iii. After, and
- iv. After with space.

l. Print Payment Discount

Indicates if the payment discount should be printed. On Sales Invoices the following Text Constants will be used: PAYAFTERDATE, PAYMENTDISCOUNTFAST, PAYBEFOREDATE and TAXABLEAMOUNT.

m. Unit Price formatting, Price formatting, Quantity formatting, Discount formatting, and VAT formatting

Specifies the formatting if the different fields that are printed, *E.g.* `<Sign><Integer Thousand><Decimals>`.

Following link explains how the formatting can be build.

<https://learn.microsoft.com/en-us/dynamics365/business-central/dev-itpro/developer/devenv-format-property#standard-decimal-formats>

n. Keep Empty VAT Clause

If the option is disabled, the VAT is retrieved from the VAT Posting Setup if it is empty on a line.

Intrastat

o. Print Intrastat

Indicates if and where the intrastat information needs to be printed.
The options are:

- i. Never,
- ii. Lines,
- iii. Totals, and
- iv. Lines and Totals.

Click on the **3 dots** that are displayed next to the option to **configure the information to be printed** (using a Text Block).

Remark: the text block cannot be specified per report layout.

p. Intrastat Totals Format

Specifies how the Intrastat Totals have to be printed. The options are:

- i. Text lines, and
- ii. Table.

Attribute printing set

q. Attribute printing set Code

This feature allows you to display specific values on the layout that are set up as an attribute value on an item.

Example given: an item has an Item Attribute COLOR with Value RED. It is then possible to print the item attribute COLOR on the article line on the layout.

*Remark: **This feature is part of the Dynavision Connect/Trade module.***

Reusable Packaging

r. Print Total Reusable Packaging

Indicates whether the total of the reusable packaging that has been inserted on the document is printed on the layout.

Remark: *when this option is enabled, it is necessary to use a Report Line Definition in which the Reusable packaging fields are included. Otherwise, the packaging will not be printed.*

Available when the Dynavision Reusable Packaging app is installed.

- i. **Never:** if this is selected, the Reusable Packaging totals will not be printed, even when there are Reusable Packaging Items noted on the document.
- ii. **If Reusable Packaging:** if this is selected, the Reusable Packaging totals will only be printed if there is a Reusable Packaging item noted on the document.
- iii. **Always:** if selected, the Reusable Packaging Totals block will always be printed, even when no Reusable Packaging items are noted on the document.

Advanced Units

s. Use Invoicing UoM

Indicates whether the Invoicing Unit of Measure is printed on the document layout. *Available when the Dynavision Advanced Pricing & Discounts app is installed. (This is also available on Purchase Quote and Purchase order layouts.)*

For Service layouts, following options are also available – only when the line definition RDL's are used.

*Remarks: The general comments are printed using the option **Print Comments** in the section **Header and Footer Texts**.*

a. Print service fault comments

Indicates if the service comments of type 'Fault' should be printed.

b. Print service resolution comments

Indicates if the service comments of type 'Resolution' should be printed.

c. Print service accessory comments

Indicates if the service comments of type 'Accessory' should be printed.

d. Print service internal comments

Indicates if the service comments of type 'Internal' should be printed.

e. Print service item loaner comments

Indicates if the service comments of type 'Service Item Loaner' should be printed.

f. Group Service Lines

Specifies how the service lines are grouped on the printed document.

This option can be specified for the **Service Invoice Grouped** report.

The options are:

- i. By service Item**
- ii. By Service Item Line**

3.2.1 Report Line Definitions

In order to set up the information that is printed in the lines of Report Layouts, Report Line Definitions is implemented. The Report Line Definition is assigned on the Report Layout Setup Card, and will be used to Dynamically render the report lines content.

The line setup in the Report Line Definition will use the settings specified on the Report Layout Setup Card, like Prioritize Item Reference, Print Description 2, etc.

When the Report Layouts are fetched using the action **Get Default Data**, Default Report Line Definitions will be fetched as well. These definitions can be used as base for setting up the line definitions for the needed report layouts.

It is important to set the **Line Definition (RDL) as default layout** for the reports that will be using the Report Line definitions.

This can be done in the page **Report Layouts**.

Remark: the Report Line Definitions cannot be used in custom made RDL's.

Remark: the Reminder, Deposit Overview and Pick-up list events do not currently support Line Definitions.

Remark: when setting up line definitions for the **transfer order**, make sure the setup is done in the view **Hide Prices**.

1. Choose the search icon, enter **Report Line Definitions**, and then choose the related link.
 - a. The page can also be accessed by choosing the action **Report Line Definitions** on the page **Report Layout Setup**.
2. On the page that opens, when the Report Layouts function **Get Default data** was used, different Report Line Definitions will be shown. If this is empty, choose the action **Get Default Data** on the page, which can be found when choosing the arrow by the action **New**.
 - a. The Report Line Definitions that are fetched depend on the installed Dynavision Extensions, such as Excise and Reusable Packaging. These fetched lines can be used as base for setting up the definitions for the lines for the reports.
 - b. By default, the **DEFAULT** Report Line Definition will be assigned to the Report Layout setup cards that use the configurable lines.
3. On the page, following information is visible for the Report Line Definitions.
 - a. **Code**
Specifies the code of the Report Line Definition.
 - b. **Description**
Specifies the description of the Report Line Definition.
 - c. **Report Layout Setup**
Displays the number of report layout setup cards on which the Report Line Definition is applied.
 - d. **Enabled**
Specifies if the Report Line Definition is enabled.
4. Choose the line that needs to be adapted, choose action **New** to create a new Report Line Definition, or choose the action **Copy** to create a copy of an existing definition to adapt.

5. On the **Report Line Definition Card**, the lines that need to be printed on the report layout(s) can be specified.
 - a. Using the action **Preview**, the configuration can be seen on a rendered preview. This preview will be generated based on a selected Report ID, using set **Report Options**. These options can be specified by choosing the action **Report Options**, which can be found by choosing the arrow displayed next to the **Preview Action**.
 - b. It is also possible to generate a full PDF render of the configuration by choosing the action **Run Report**.
6. Following information can be specified for the Report Line Definition. These lines can be specified for the layouts that need to be printed with prices, and without prices. Using the action **Setup 'Hide Prices'**, the line definitions for the reports without the prices can be defined.
 - a. **Code**
Specifies the code of the Report Line Definition.
 - b. **Description**
Specifies the description of the Report Line Definition.
 - c. **Table No., Table Caption**
Specifies the table that is used as source for the content of the columns in the line. This will automatically contain the correct information.
 - d. **Enabled**
Specifies if the Report Line Definition is enabled.
 - e. **Report ID, Report Description**
Specifies the report that is used to generate the preview of the line definition.
 - f. **Report Options**
Specifies whether options on the report request page have been set, which are taken into account when generating the preview.
 - g. **Print Prices**
Specifies if prices are printed and where.
The options are:
 - i. **Never,**
 - ii. **Lines,**
 - iii. **Totals, and**
 - iv. **Lines and Totals.**
 - h. **Alternating Line Color**
Using a color scale, select the color that needs to be used to color the even lines that are printed on the layout.
 - i. **Draw Line in table**
Specifies if lines should be drawn in the printer table of items.
 - j. **Unit**
Specifies the unit that is used for setting the dimensions for the report columns. This includes width of the columns, padding, etc.
 - k. **Width**
Specifies the maximum width of the report line, excluding line margins.
 - l. **Columns**

i. Line Type

Specifies the line type to which the columns apply.

The options are:

- 01.** Header,
- 02.** Document,
- 03.** Comment,
- 04.** Comment header (*prints the service comment type on the layout before the comment is printed on the layout*),
- 05.** Text (*used to print e.g. Item Attributes*),
- 06.** Assembly,
- 07.** Service Item,
*Tip: when printing Service items, use the Content **Service Item No.** to print the service item no. instead of the "Normal" item numbers.*
- 08.** Transport

Remark: this type can be used to print transport information on the Trip Sheet when Dynavision Planning & Dispatch is installed.

ii. Column No.

Specifies the number of the column.

iii. Group

Specifies on which line the information has to be printed. This makes it possible to print multiple lines with information in 1 column.

iv. Content

Specifies the content that needs to be printed in the column. For header lines, this will be a text constant. For normal lines and others, this will be a field from a field list.

v. Format

Specifies how the content should be formatted. This is the formatting that is specified on the Report Layout Setup Card.

The options are:

- 01.** Empty,
- 02.** Unit Price,
- 03.** Price,
- 04.** Quantity,
- 05.** Discount, and
- 06.** VAT.

It is also possible to print a **Title before the value** printed in the document lines. This is possible by selecting the three dots in the field **Format**.

- **Title**
Select the **Text Constant** to be printed as title, or type a free text in the field.
- **Title separator**
Select the separator that should be used to separate the chosen title and the value that will be printed in the column.
- **Title Type**

This field will be automatically filled in with **Free text** or **Text Constant**, depending on the Title value.

- **Preview**

Displays the preview of the value that will be printed using the title and separator.

- vi. Alignment**

Specifies the horizontal alignment of the column.

- vii. Position**

Specifies the start position of the column.

- viii. Alignment Action**

Displays a suggested action for updating the alignment of the column. Choose the action that is displayed to execute the suggestion.

- ix. Position Action**

Displays a suggested action for updating the position of the information of the line.

Choose the action that is displayed to execute the suggestion.

7. The setup for the **Report Line Types** can be edited by choosing the action **Line Type**, in the Columns section. This page displays the font size and formatting of the line types, and can be changed accordingly.

It is also possible to assign a background color that needs to be applied on the lines of that type when they are printed. This is done by adding the RGB number of the color in the field **Background Color**.

8. When the line definitions are set up with and without prices, the layout will be printed with prices if this is specified on the report print, and without prices if this is selected or specified for a certain report layout. (see print prices options mentioned in the manual)

Important remark: when using the action *Get default data to fetch the report line definitions*, in the line definitions the **Line Type Text** is added with **content Description**. Make sure to not delete this line, as this **is used to print the Serial numbers, lot numbers etc.**, when enabled on the report layout setup for that layout.

Remark: on the sales order confirmation, it is also possible to add the shipment date to the lines in the document. This information needs to be added to the report line definition. The value will only be printed on the sales order confirmation with configurable lines RDL.

3.2.1.1 Import and Export report line definitions

In order for a more efficient setup of the report line definitions, it is now made possible to export the line definitions and import them in another environment.

1. Navigate to the **Report Line Definitions** list page.
2. Select the report lines that need to be exported in the list page and choose **Definition, Export**.
 - a. The selected lines will be exported into a XML file. This file can then be edited if needed and imported again.
3. If only one definition needs to be exported, either only select that definition in the list, or navigate to the Report Line Definition Card and choose the **Export** action.
4. Importing of an XML file can be done on the list page by choosing the action **Definition, Import**. The XML file can be selected, and the line definitions will be imported.
 - a. **Remarks**
 - i. *It is not possible to import line definitions that have the same names as the existing definitions.*
 - ii. *Make sure that the language of the environment is set to the same language as the file that is imported. Otherwise, errors can occur for values that are not translated in the export of the file.*

3.2.2 Print Structured Message

If you are using the **Dynavision Finance** application you will often display the **structured message** in the footer, this can be done in the following way:

1. Choose the search icon, enter **Text Constants**, and then choose the related link.
2. Choose the **New** action.
3. Enter the necessary information to set up the text constant that will be displayed in the footer.
 - a. **Code**
The Code to identify the text constant. (E.g. *STRUCTUREDMESS*)
 - b. **Description**
The description of the text constant. (E.g. *Structured Message*)
 - c. **Table No.**
The table that has to be linked to the text constant. This is the table from which the information will be retrieved for this text constant. (E.g. *table no. 112 (sales invoice header)*)
4. In the **Languages for Text constant** tab enter the **Text Constant Data**. This data can be defined in the different languages that can be printed.
 E.g. "structured message: F%71176650F%". Between the placeholders **F%** the desired field id needs to be entered, in this example "71176650".
 Make sure the correct Table No. is selected for the Text Constant.
 The **field Id** can be found using the **Page Inspector**
 Remark: The page inspector can be called by the following combination:
 Ctrl + Alt + F1.
5. In the field **Footer Text** on the **Report Layout Setup Card**, select this newly created text constant in order to print the structured message on the layout in the footer.

3.2.3 Print Item Attributes – Report Layout

On a Dynavision Report, it is possible to print the item attributes of items noted on the printed document, by setting the option **Print Attributes** on either **Global** or **Layout Specific**.

When first enabling this option, by default all item attributes will be included on the document.

The **Item Attributes – Report Layout page** can be accessed in two different ways.

1. On the Report Layout Setup Card, choose the **Three dots** next to the **Print Item Attributes** field.
 - a. **Remark:** *this page can only be opened when the value of the field is other than None.*
2. On the **Item Attributes** page, choose the action **Report Layout**.
 - a. **Remark:** *this will open the **Global** print item attributes settings page. If the layout specific item attribute prints need to be changed, this needs to be done via the Report Layout Setup Card for the desired report layout.*
3. On the page that opens, select the item attributes that need to be printed on the report layouts.
 - a. When this is updated on the global settings, this will be applied on all reports with setting **Global** on the Report Layout Setup page.
 - b. When this is updated on the layout specific page, this will only be applied on the report layout on which the item attribute print settings page was opened.
4. (Optional) Specify the **Sequence** in which the item attributes need to be printed on the report. This can be influenced using the **Move Up** and **Move Down** options, or it is possible to fill in a number in the Sequence field manually.
 - a. **Remark:** *when using a sequence, make sure that all item attributes that need to be printed have a sequence number assigned. Otherwise, the system will mix alphabetical sorting and the sequence numbering.*
5. (Optional) Set the desired **Separator** that needs to be used to print the Item attributes in the lines. This will be used to separate the printed item attributes on the layout.
 - a. **Remark:** *this indicates how the current attribute should be separated from the next printed attribute, not how the attribute name and value should be separated.*
 - b. **Remark:** *If an attribute has no value, it will be skipped. The other attributes that have a value will be printed, taking into account the selected separators.*
 - c. **Option new line:** the next attribute will be printed on their own line.
 - d. **Options other than new line:** combine item attributes on the same line, separated with the specified token.

After setting this, and the setting on the report layout, the attributes, linked to the items that are checked will be printed.

Remark: *In the Dynavision Trade module, the **Attribute Printing Set** is created, in order to print item attributes in a more advanced way. (See the Dynavision Connect manual.)*

3.2.4 Company Information

On the **Company Information** page, the default language of the company needs to be specified.

1. Default Language Code

Specifies the default language that is used in the company for printing of documents. A value from the Languages list can be chosen.

2. Setup Mode

If enabled, the name of the defined Text Constant will be printed on the report instead of the Text Constant Data.

This can be useful when something needs to be changed, but it is not immediately clear which Text Constant is printed in the location that needs to be modified.

This option makes it possible to easily identify the correct Text Constant that needs to be completed, translated or corrected.

3.2.5 Text constants

When configuring layouts, text constants can be used in order to show the correct data in a field or certain location.

In text constants it is possible to define translations which will insure that the printed text will be translated to the correct language in which the document needs to be printed.

1. Choose the search icon, enter **Text Constants**, and then choose the related link.
2. Choose the **New** action.
3. Enter the necessary information to set up the text constant that will be displayed in the footer.
 - a. **Code**
The Code to identify the text constant. (E.g. *STRUCTUREDMESS*)
 - b. **Description**
The description of the text constant. (E.g. *Structured Message*)
 - c. **Table No.**
The table that has to be linked to the text constant. This is the table from which the information will be retrieved for this text constant. (E.g. *table no. 112 (sales invoice header)*)
 - d. **Available in Line Header**
Specifies if the text constant can be used in the
 - e. **Replacement Code**
Specifies which other text constant can be used as replacement of this constant.
E.g. VAT No. vs Enterprise No.
This will E.g. make sure that when the Enterprise No. is printed for documents with BE region the text constant for enterprise no will be printed, or when the VAT No. is printed in case this is changed to something other than BE, the text constant for VAT No. will be printed.
4. In the **Translations** tab enter the **Text Constant Data**. This data can be defined in the different languages that can be printed.
E.g. *"structured message: F%70739601F%"*. Between the placeholders **F%** the desired field id needs to be entered, in this example *"70739601"*.
 - a. Select the **Language Code** for the translation to be added or change an existing translation.
 - b. In the **Data** field, add the wanted text and optionally a field ID.
 - The field ID can be added by choosing the **Translations Menu**, and choosing the action **Insert field value**. This makes it possible to select a field from the selected **Table No.** on text constant.
 - The field ID can also be added manually.
(The **field Id** can be found using the **Page Inspector**).
Remark: The page inspector can be called by the following combination: Ctrl + Alt + F1.
 - c. (Optionally) Select the **Report ID** if the translation is added specifically for a certain Report.

- d. (Optionally) Select the **Report Layout Setup** for which the translation should be printed. This makes it possible to only print certain text constants for certain versions of a report. If nothing is selected, the translation will be printed for all versions of the selected report ID.

Remark: There is already a number of standard text constants provided by default, but it is also possible to create new ones.

3.2.6 Create Default Setup

When the default report layouts are installed, there are new text constants created. For the default language on the **Company Information**, new translations are automatically inserted for these text constants. *Remark: If there is no default language set on the **Company Information**, there will be no translations generated.*

In case that the Company information was incomplete and no **Default Language Code** was selected, these translations will not have been added.

To counter this, the action **Create Default Setup** on the page **Report Layout Setup** is added. Using this action the missing Text Constant translations will be added if they are missing.

When the translations are not set up properly, following steps can be taken in order to fix this setup.

1. Choose the search icon, enter **Report Layout Setup**, and then choose the related link.
2. Delete all report layout setup records on the list page.
3. Choose the action **Text Constants**.
4. Delete all text constants.
5. Navigate back to the **Report Layout Setup** page.
6. Choose the action **Create Default Setup** in order to add the default configuration of the report layouts and the text constants with the translations
 - a. If the **Default Language Code** is not set on the **Company Information** page, a message will be shown and the report layouts and text constants will not be added.
 - b. Fill in the **Default Language Code** in the **Company Information** and choose the action again.

Remark:

In case the localization of the environment is set to BE, the translations for NLB/FRB/ENU will be automatically inserted for the text constants.

There will also be a translation added for the language set in the **default Language code** on the **Company Information** page when this code is not NLB, FRB or ENU.

When the environment is configured in a localization other than BE, the translations for the **Default Language Code** on the **Company Information** will be added to the Text Constants. *Other languages can be added by using the Add Language action.*

3.2.7 Add Language to Default Language Codes

1. In order to add a language to the languages list than can be selected as **Default Language Code**, go to **Company Information**.
2. In field **Default Language Code** select the arrow to open the drop down list.
3. Choose action **New** to add a new language.
4. After inserting all information, the language can be chosen as the **Default Language Code**.

3.2.8 Add Languages to Text Constant

1. In order to add a language to a Text constant, an action is implemented. First step before the language can be added to the environment is following:
 - a. The translations need to be available in the environment. These are added trough a separate extension.
 - b. Navigate to **Extension management** and check if the translation is installed in the environment.
 - c. If **not installed**, navigate to the **Extension Marketplace**, and search for the language that needs to be installed. Search for the wanted language and install to the environment.
2. Once the language is installed, follow next steps to add the language to the Text constants linked to a table. *(for manually added constants, the system will not know the translation that needs to be added for the language)*.
3. choose the search icon, enter **Report Layout Setup**, and then choose the related link.
4. Choose the action **Text Constants**.
5. Choose the action **Add Language** that can be found when choosing the arrow next to the **New** action on the Action Bar.
6. Select the language that needs to be added to the Text Constants.
7. If there are translations available, the translations will be added to the constants.

Remark: this is useful when a new language has to be supported.

3.2.9 Sync Setup

The report layout setup can be copied from one company to a selection of other companies. This will copy all report layout setup from the current company to the selected other companies on the tenant.

The data in the target companies will first be deleted, and then replaced by the data from the current company, from which the sync is executed.

Remark: *this is only possible between companies in the same environment.*

1. On the list page **Report Layout Setup**, choose the action **Sync Setup**.
2. Select the **tables** that need to be synchronized. Use multiselect to select multiple lines (shift-click or ctrl-click). Select **OK**.
3. Select the **target companies** to which the report layout needs to be copied.
4. A message will be shown to indicate the number of selected tables that will be synced to the selected quantity of target companies. Choose **Yes** to continue and copy the setup data.

3.2.10 Creating a new Report Layout

When choosing the action **New** on the **Report Layout Setup** page, and choosing a Dynavision Report in the field **Report ID**, the Report Layout Card will be configured with the default settings as provided by Dynavision.

This will also be applied when changing the **Report ID** of an existing report to another Dynavision Report.

3.3 Report Selection

It is possible to select the desired report that needs to be printed for a certain kind of document.

This setup can be done using the **Report Selection** pages. There is a page set up for each type of document.

In the following steps, the page for sales will be used to illustrate the setup.

Search for the following pages:

1. choose the search icon, enter **Report Selection - Sales**, and then choose the related link.
2. In the field Usage, select the type of document for which the report is added/changed.
3. Complete the necessary fields.
 - a. **Sequence**
The order in which the reports are printed. This is useful in case different reports need to be printed for a type of document.
 - b. **Report ID**
Specifies the Object ID of the Report Layout that needs to be printed.
 - c. **Report Caption**
The name of the selected Report Layout will be displayed.
 - d. **Use for Email Body**
Specifies that summarized information, such as invoice number, due date, and payment service link, will be inserted in the body of the email that you send.
 - e. **Use for Email Attachment**
Specifies that the related document will be attached to the email.
 - f. **Email Body Layout Description**
Specifies a description of the email body layout that is used.

In case Dynavision Connect is installed, the Report Layout setup list view is expanded with information of the report selection setup for the current report in the list. This page can then be used to configure the report selections for the Dynavision reports.

3.4 Report Layout Dashboard

The Dynavision Layouts integrates with the Report Layout Dashboard set up in Dynavision Connect.

More information about the dashboard can be found in the **Dynavision Connect Manual**. Default Report Selection Types will be assigned to the Layout Reports, and a Report Usage will also be assigned.

This information will be displayed for the Report ID's of the Dynavision Reports.

The actions as described in the Connect manual, like viewing if the report is already configured in the Report Selections, can also be used in combination with the Dynavision Reports.

3.5 Text Blocks

In order to have more flexibility in setting up how addresses need to be printed, Text blocks can be configured.

3.5.1 Setup

1. Choose the search icon, enter **Text Blocks**, and then choose the related link.
2. In the page that opens, select the text block that needs to be edited or choose action **New**.
3. Enter the necessary information *as described in the manual of **Dynavision Connect***.
4. In order to choose the fields that need to be printed in the address block, either the option to print the full address can be chosen (*select No. 1 Address as fieldname in the text block*), or the address can be configured using the individual fields that are available to add to the text blocks.

3.5.2 Extra header space tip

When using Text blocks in the Address block of the layout, it is possible to add extra lines with type Free text and no text on the line in order to improve readability on the printed layout, in case no header fields are printed. *When no header fields are defined on the layout, there will be no line printed. This can have an effect on the readability of the printed layout.*

3.6 Print options

3.6.1 Print prices on sales shipment

It is possible to print the prices of the items on the sales shipment layouts. This can be set in the **Report Layout Setup** page in the **Print Prices** field by choosing either **rules**, **totals** or **Rules and totals**.

This way, the prices will be printed on every sales shipment document that is printed, for every customer, *if the option on the customer card is enabled, or chosen for yes in the print report*.

On the **Customer Card** in the **Shipping** tab, there is an option **Print Prices on Shipment** that can be enabled or disabled. *By default this option will be disabled.*

When navigating to a **(Posted) Sales Shipment** and choosing the action **Print**, the screen opens where additional filters and options can be set for the printing of the layout.

In the option **Print Prices** there are different options that can be selected in order to determine if the prices will be printed on the documents. This means that the printing of the price can always be overridden.

Remark: The **Print Prices** option is only visible on the **Print Report page** if this **Print Prices** option on the **Report Layout** is set to a different value than **Never**.

If the **Print Prices** option is enabled in the **Print report page**, the system will check the value of the **Print Prices** field on the **Report Layout Setup**, to determine which prices need to be printed on the layout.

3.6.2 Print Prices on Warehouse Shipment

It is possible to print the prices of the items on the warehouse shipment layouts. This can be set in the **Report Layout Setup** page in the **Print Prices** field by choosing either **rules**, **totals** or **Rules and totals**.

This way, the prices will be printed on every sales shipment document that is printed, for every customer, *if the option on the customer card is enabled and customer setting is chosen, or yes is selected in the print report*.

On the **Customer Card** in the **Shipping** tab, there is an option **Print Prices on Shipment** that can be enabled or disabled. *By default this option will be disabled.*

When navigating to a **(Posted) Warehouse Shipment** and choosing the action **Print**, the screen opens where additional filters and options can be set for the printing of the layout.

In the option **Print Prices** there are different options that can be selected in order to determine if the prices will be printed on the documents. This means that the printing of the price can always be overridden.

Remark: The **Print Prices** option is only visible on the **Print Report page** if this **Print Prices** option on the **Report Layout** is set to a different value than **Never**.

If the **Print Prices** option is set to "Yes" in the **Print report page**, the system will check the value of the **Print Prices** field on the **Report Layout Setup**, to determine which prices need to be printed on the layout.

If the option is set to **Customer Setting**, the system will check the option on the customer card, and will print the prices if this is enabled.

Remark: *if a warehouse shipment contains multiple customers, the prices will never be printed.*

3.6.3 Print Quantity on Warehouse Shipment

On the Report page of the (unposted) Warehouse Shipment, there is an option added to make it possible to print the prices calculated based on the Quantity To Ship value or the Quantity value of the sales order.

1. Navigate to a Warehouse Shipment to be printed.
2. Choose the action **Print**.
3. On the page that opens, a new field can be found: **Print Quantity**.
The options are;
 - a. Quantity, and
 - b. Quantity to Ship
4. In case **Print Prices** is enabled, the prices will be calculated using the quantity selected on the report page.
 - a. *Remark: it is also possible to print the original quantity and quantity to ship on the report by default, by adding the column to the Report Line Definitions of the shipment document.*

3.6.4 Intrastat information linked to customer/shipment

For following documents, it is possible to specify if the intrastat information needs to be printed on the layout:

1. Sales Quote,
2. Sales Order,
3. Sales Invoice,
4. Sales Credit Memo,
5. Sales Return Order,
6. Sales Blanket Order,
7. Posted Sales Invoice
8. Posted Sales credit Memo, and
9. Service Invoice.

This can be specified in the field **Print Intrastat** on the **Report Layout Setup Card** of the document that needs to be printed.

On the **Customer Card** in the **Shipping** tab, there is also a field **Print Intrastat** that can be changed in order to indicate if the intrastate should be printed. This field has following options:

- Yes,
- No,
- Check Shipping.

The check shipping option will work as follows:

*It looks at the **Country/Region Code** in the header.*

*If no country code is entered in the header, the **Country/Region Code** of the **Location** is retrieved. If that field is also empty, the Country/Region Code of the company Information is retrieved.*

*The **Country/Region Code** from the **send to** address is also retrieved.*

When both country/region codes are retrieved (FROM and TO), a check will be performed on the Intrastat-Code of those countries/regions.

If the Intrastat-Codes are different, the intrastat applies and the intrastat will be printed on the layout of the document.

If the Intrastat-Codes are the same, the intrastat does not apply and the intrastat will not be printed.

When the send to address or the location is changed, the validation will be executed again when printing.

3.6.5 Number of copies printed vs. mailed

When a document is printed, using the **Print** action, it is possible to specify the number of copies that need to be printed of this document.

*Example given, we need two copies, so we input **2** in the field **No. of copies** (e.g.: because we give one copy with shipping or mailing and one copy for internal use).*

When we print this task, the document will be printed twice.

When the document is mailed to a receiver, the document will only be attached once as PDF or Electronic Document. The **No. of copies** field will not be taken into account.

3.6.6 Printing payment services on sales invoice

A payment service or PSP (Payment Service Provider) is a third-party solution that enables businesses to accept a variety of online payment methods by connecting them to the broader financial system. Payment services simplify payment transactions between merchants and their customers.

An example of such a PSP is PayPal.

Payment services can be added in Business Central in the **Payment Services** page.

1. choose the search icon, enter **Payment Services**, and then choose the related link.
2. Select the Payment Service that needs to be included on the document and choose action **Setup**.
3. Following field can be checked in the setup.
 - a. **Always Include on Documents**
Specifies that the payment service is always available in the Payment Service field on outgoing sales documents.

If the option **Always Include on Documents** is checked, it will be printed on outgoing sales documents if the payment service is selected on the document.

Remark: the Payment Service will not default be printed on existing sales documents, in order to print this Payment Service on existing sales documents that were created before the setting was enabled set the Payment Service on the document.

1. Navigate to a posted sales invoice.
2. Choose action **Change Payment Service**.
3. Select the desired Payment Service on the document from the available payment services by checking the checkbox in column **Available**.
4. Choose **OK**.
5. Choose the action **Print** and select **Print** or **Preview**.
6. The printed document contains the chosen payment service on the layout.

3.7 Report Layout Setup Versions

In order to make it possible to set up different versions of a report, a new functionality has been added to the Dynavision Layouts module.

This functionality makes it possible to “clone” a report and add some minor tweaks to this cloned report.

A version of an existing report can be created by selecting the Report ID in the **Report Layout Setup** page.

Choose the action **Copy to new Setup** for the selected report ID or choose the action **New** and select the Report ID from which a new version needs to be created.

The Report will be copied or added, and the **Version** will automatically be increased.

Open the **Report Layout Setup Card** and edit the version in order to contain the information needed.

It is always possible to test the set up layout configuration by choosing the action **Run Report**. This action will pre select the version from which the action is executed. Another version can be selected in the **Options Tab** in the report page that opens. Select the other version in the **Description** field in the Options Tab.

3.7.1 Printing of certain version

A different Report Layout Version can be **manually** selected on the request page. *This functionality is currently supported by all reports of Dynavision Layouts.*

1. Choose the action **Print** on a document for which versions of the layout are set up.
2. On the Report page that opens, the version can be selected in the **Options Tab** in the field **Description**. Select the three dots next to the field and select the Report ID and Version that needs to be printed.
3. Choose the action **Print**.
4. The selected version is printed.

One way to set up a default version is by setting the version for the customer, as noted in the section [Customer Document Layouts – set default version for customer](#).

Another way to select a certain version to always be printed is by setting this version through Development.

Contact your partner in order to set up the version selection in code.

3.7.2 Remarks

The **Send by Email** and **Attach as PDF** functionality don't support the option to select the version of the layout that needs to be printed in the report page.

3.7.3 Customer Document Layouts – set default version for customer

An option is added in which a Custom Report Layout setup can be specified on the customer document layouts. This can be useful when working with different versions of a report, that needs to be different for EU customers and NON-EU customers, example given.

The to use version in emails, default as print option, or when executing the Attach as PDF action, can be specified in the **Document Layouts** either from the customer card, or by choosing the value in the column **Customer Document Layouts** on the **report layout setup** page.

The version for each report for the customer can be specified in the column **Email Attachment Layout Setup**.

The added column on the Report Layout Setup page indicates for the different Report ID's (/version) how many times it is set up as attachment for a customer in the **Document Layouts**.

3.8 Print Payments

On the sales documents and service documents that are printed for customer facing communication (sales invoices, order confirmation,...), if there are payments and refunds applied on the document, this information will be printed on the layout of that document.

Remark: *only applied payments will be printed on the document.*

3.9 Print Alternate VAT Address

The system will automatically take the correct information when printing **header information** for VAT.

When the field VAT Registration No. or Enterprise No. is selected in the **Header Fields** of the report layout, then the **VAT Country/Region Code** is used to determine which VAT Registration No. or Enterprise No. needs to be printed.

Depending on this country, the **Replacement Code**, that is (optionally) set up for the text constant that is printed for the header field, will be printed if applicable.

E.g. *when the VAT Country is BE – Enterprise No. will be printed from the document, if the VAT country is <> BE, example given LU, the VAT Registration No. will be printed, and the accompanying text constant (if configured in replacement code).*

3.10 Report Layout Setup Edit in Excel

Because the headers of many layouts contain the same information, it is possible to edit the reports using excel.

1. Navigate to the **Report Layout Setup** page.
2. Choose the **Share** action on the right side of the page and choose **Edit in Excel**.
3. The excel file will be downloaded. Open the file and enable editing. Log in with the account that is used in Business Central.
4. The excel page will be filled with the existing Report Layouts set up in the Business Central tenant.
5. Edit the information in the excel that needs to be edited. *It is possible to use the standard functionality of Excel to copy information to multiple cells etc.*
6. After applying all changes to the Report Layout Setups, choose the action **Publish** in the Excel page. The information will be published to the Report Layout Setup page.
7. Navigate back to the Report Layout Setup page, the changes can be viewed that were made in excel.

3.11 Print Company Country

It is possible to print the Country, set on the **Company Information** page on documents. This is made possible with an extra setting on the Company Information page.

1. Navigate to the **Company Information** page.
2. Enable the option **Print Country on Documents**.
3. The country will be printed on the documents, translated in the language of the printout.

3.12 Hide lines on report

It is possible to indicate if lines on a document (on which Dynavision Report Layouts is supported) should be printed or not.

Navigate to the document for which lines need to be hidden on the print. For the lines that need to be hidden, enable the option **Hide on layout**. When the report layout is printed, these lines will not be printed on the layout.

Remark: make sure that the option **Print Hidden Lines** on the **Report Layout Setup Card** is correctly configured for the report.

Remark: the line will be excluded from the report. This means that, if an item line is hidden on the layout, the price of this line will not be included in the totals of the report.

This functionality is mainly implemented to hide comment lines from the reports.

3.13 Format lines on report (and Extended Texts)

On the documents where (line definition) report layouts are supported, it is possible to format the lines individually on the printed layout.

Navigate to the document and for the lines that need to be formatted, enable the wanted layout options. The options are **Italic, Bold, and Underlined**.

It is also possible to add these formatting to extended text lines, to make sure that these lines always have the desired markup when printed on the documents.

Remark: the columns are hidden by default. These can be added through personalization. The formatting will be applied on document lines. The formatting of the report line types will take precedence when printing reports for these lines.

3.14 Mark lines as optional on sales quotes

On Sales Quotes, the functionality is added to be able to mark lines as optional. These lines will not be included in the report totals and VAT totals that are printed on the sales quote document layout.

The option **Optional** needs to be added to the Sales Quote lines through personalization.

Enable this option for lines that need to be included on the sales quote print, but do not need to be added to the report totals.

This can be useful for lines that are included on the quote as extra possible options for the customer to buy.

3.15 Print Subtotals per group of lines on sales quote/order

3.15.1 Standard Texts and Extended Texts Setup

Lines on a sales quote or sales order can be indicated as belonging to a subgroup. This can be useful to Print totals per subsection of lines on a document.

Navigate to the **Standard Text Codes** or the **Extended text for an item** and use personalization to add the column **Report Group Type** to the page.

Add the Texts that need to be printed on the report layout for the header of the subsection and the subtotals.

Indicate the **Report Group Type. Heading** indicates that this the start of the subgroup in the report. **Total** indicates that this text is used to print the total of this subgroup.

3.15.2 Report Line Definition

Navigate to the Report Line Definition on which the subtotals need to be printed.

Add the Line Types **Group Header** and **Group Total** to the Line Definition columns. It is possible to print the description of the Group Header, and to add a line definition for the Description of the Group Total and the Line amount that is calculated of the item lines that belong to the Group.

Remark: Currently supported fields are limited to 'Description' (header / total) and 'Line Amount' (total).

The **Group Header** and **Group Total** can be formatted separately in the Report Line Types in the Line Definition of the Sales quote/order.

The setup for the **Report Line Types** can be edited by choosing the action **Line Type**, in the Columns section. This page displays the font size and formatting of the line types, and can be changed accordingly.

3.15.3 Usage on Sales Quote or Sales Order

Once all setup is done, on the Sales Quote or Sales Order, add a comment line on which the heading needs to be noted for the subsection.

Either add extended texts of the items, or manually add comment lines to the document on the places where the subsection begins and end.

Optionally select a Standard Text on the comment line, or add a custom description for the subsection.

Select the **Report Group Type** on the comment line of type **Heading**.

Do the same at the end of the subsection, by adding a comment line, and selecting a **Report Group Type** of type **Totals**.

***Remark:** it is possible that the column is not yet visible on the Sales Quote or Order. Add this through personalization if needed.*

When the document is printed, the information that is set on the comment lines will be added printed on the report layout with the specified format and data on the line definition.

On the layout, where the lines of type totals are added, a subtotal of the lines that are between header comment line and totals comment line will be shown (*if this is configured in the line definition by adding the totals type line with the value amount*).

3.16 Export data from Dynavision Layouts

There are several functions added that can be used to export report layout settings, in order to import this in a production environment or other environment.

1. Text Constants

- a. There is an **Import/Export** function added, that can be used to export all text constant settings to a Rapidstart configuration package, or to import one.

2. Text blocks

- a. There is an **Import/Export** function added, that can be used to export all textblock settings to a Rapidstart configuration package, or to import one.

3. Report Line Definitions

a. Export

Exports the selected report line definition(s) in XML format, allowing to import them into another environment.

b. Import

Imports Report Line Definition(s) in XML format.

4. Report Layout Setup

- a. Export the setup data to excel via config package.
- b. Use the **Edit in excel** function in the new/other environment to quickly configure the report layout setups, using the data from the excel export.