



# BEYOND

## MANUFACTURERGROUPTYPE

# User Guide



### **BEYONDIT GmbH**

Schauenburgerstr. 116  
24118 Kiel  
Germany  
+ 49 431 3630 3700  
hello@beyondit.gmbh

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# About BEYOND ManufacturerGroupType

## About this Extension

BEYOND ManufacturerGroupType is an extension for Microsoft Dynamics 365 Business Central.

It was developed by:

## BEYONDIT GmbH

Schauenburgerstraße 116

24118 Kiel

Deutschland

[moin@beyondit.gmbh](mailto:moin@beyondit.gmbh)

+49 431 3630 3700

BEYOND ManufacturerGroupType is used to store and maintain additional data (manufacturer, group and type) on service items. After installation, the columns **Manufacturer**, **Group** and **Type** are added to the service item list and as fields of the same name on the service item card.

This information allows you to categorize your service items and expand the filter functions in the service item list.

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

The examples described in this documentation represent only a part of the possibilities that the BEYOND ManufacturerGroupType 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

#### No dependencies from or to other apps

No dependent applications are required to use BEYOND ManufacturerGroupType, i.e. you do not need to install any additional applications.

Version	Date	Author	Comment
1.0	04.01.2023	Jannic Weidel	Initial version of the documentation
1.1	10.05.2023	Jannic Weidel	Added Chapter for assigning permission sets
Access		public	

[Continue with the next chapter](#)

# Assign User Permissions

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

Permission Set	Description
<b>BYD MGT ALL</b>	This permission set enables the use of the <b>BeyondManufacturerGroupType</b> extension.

To assign the permission set for **BEYOND ManufacturerGroupType** 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.

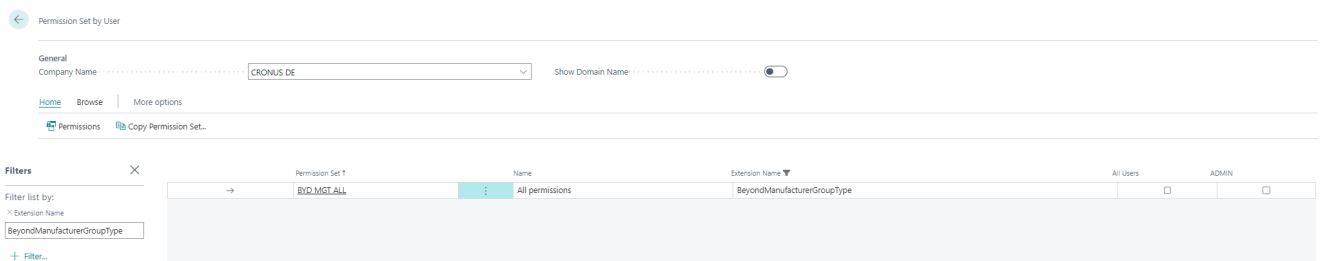


Figure: Permission Sets for BEYOND ManufacturerGroupType

6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondManufacturerGroupType** as filter criteria.
8. The list is filtered to the permission sets of **BeyondManufacturerGroupType**.
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 ManufacturerGroupType** to a user. Note that users with the **SUPER** permission set have all rights, i.e. you do not need to give this user any additional rights.

# Create Manufacturer

This chapter describes how to create a manufacturer for service items. You can use this manufacturer to categorize service items and filter by this manufacturer.

To create a manufacturer, proceed as follows:

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

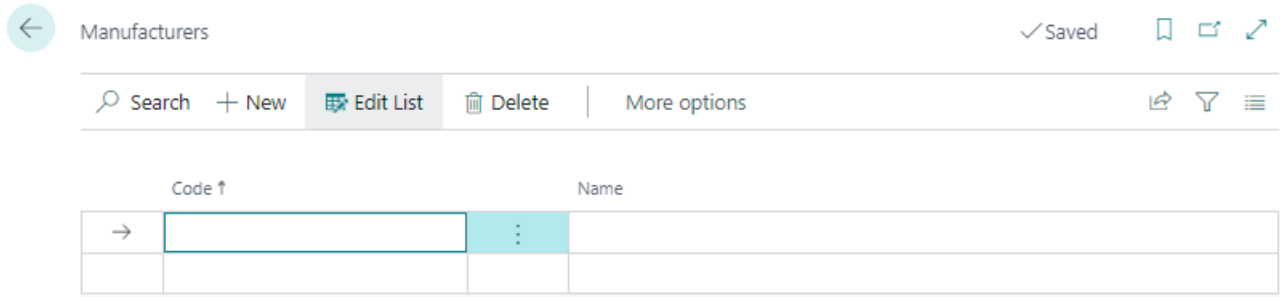


Figure: Create Manufacturer

4. To create a manufacturer, click **New** in the menu bar.
5. Enter a code and the name of the manufacturer.

You have created a manufacturer. You can assign the manufacturer to a service item. For more information on how to categorize a service item, see the [Categorize Service Items](#) chapter.

# Create Group

This chapter describes how to create a group for service items. You can use this group to categorize service items and filter by this group.

To create a group, proceed as follows:

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

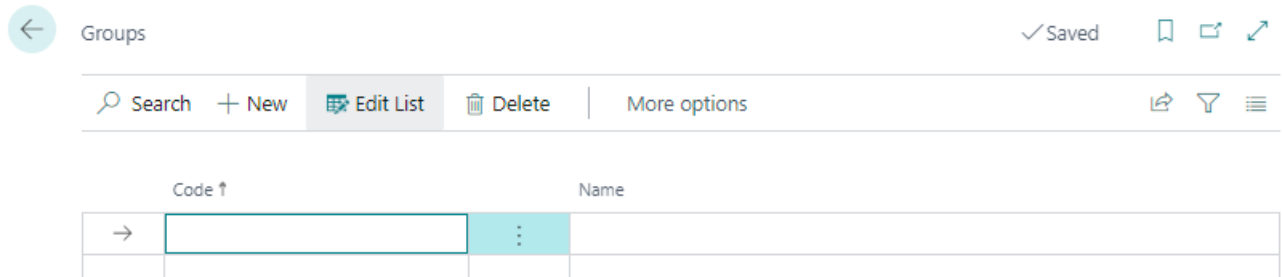


Figure: Create Group

4. To create a group, click **New** in the menu bar.
5. Enter a code and the name of the group.

You have created a group. You can assign the group to a service item.

For more information on how to categorize a service item, see the [Categorize service items](#) chapter.

# Create Type

This chapter describes how to create a type for service items. You can use this type to categorize service items and filter by this type.

To create a type, proceed as follows:

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

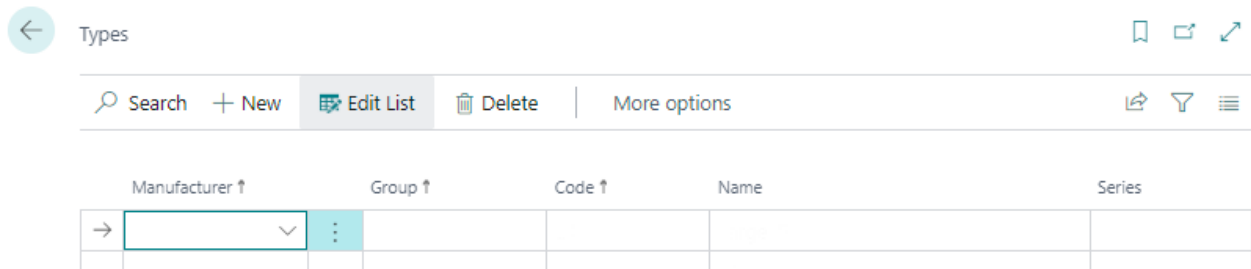


Figure: Create Type

4. To create a type, click **New** in the menu bar.
5. Specify the manufacturer associated with the type and the group.
6. Enter the code and the name of the type.
7. You can optionally enter a series in the column.

You have created a type. You can select the type for a service item as soon as you have stored the configured combination of manufacturer and type for the service item.

For more information on how to categorize a service item, see the [Categorize Service Items](#) chapter.

# Categorize Service Items

This chapter describes how you can categorize service items using information on manufacturer, group and type.

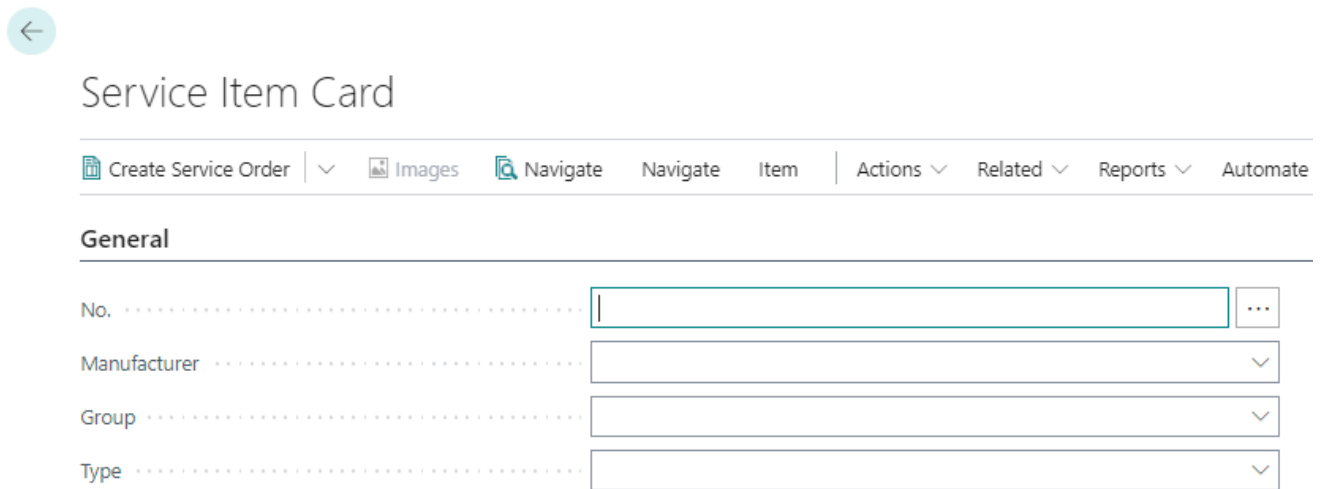
For the following description, we assume that information on manufacturers, groups and types already exists in the system.

For more information on how to store this information in the system, see:

- [Create Manufacturer](#)
- [Create Group](#)
- [Create Type](#)

Follow these steps to categorize a service item:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Service Items** and click on the appropriate search result.
3. The **Service items** list is displayed.
4. To categorize a service item, open the service item card.



The screenshot shows a 'Service Item Card' interface. At the top left is a back arrow icon. The title 'Service Item Card' is centered. Below the title is a navigation bar with icons and labels: 'Create Service Order' (with a dropdown arrow), 'Images', 'Navigate' (with a magnifying glass icon), 'Navigate', 'Item', 'Actions' (with a dropdown arrow), 'Related' (with a dropdown arrow), 'Reports' (with a dropdown arrow), and 'Automate'. Below the navigation bar is a section titled 'General'. Under 'General', there are four fields: 'No.' (with a text input field and a three-dot menu icon), 'Manufacturer' (with a dropdown menu), 'Group' (with a dropdown menu), and 'Type' (with a dropdown menu).

Figure: Service Item Card with Manufacturer, Group and Type

5. On the service item card, under the **Manufacturer** field, specify the appropriate manufacturer of the service item.
6. Under the **Group** field, specify the corresponding group of the service item.
7. Under the **Type** field, specify the corresponding type of the service item.

You have categorized the service item.

You can filter the display of service items based on the information. For more information, see the chapter [Filter Service Items by Manufacturer, Group or Type](#).



# Filter Service Items by Manufacturer, Group or Type

This chapter describes how to filter the display in the service item list so that only service items of a certain manufacturer, group and/or type are displayed.

To filter the service items, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Service Items** and click on the appropriate search result.
3. The **Service Items** list is displayed.
4. To show the filter area, click the filter icon or press the **SHIFT+F3** on the keyboard.



Figure: Filter Area

5. Click on the plus symbol to define a filter.
6. You can use the information from the **Manufacturer**, **Group**, and **Type** fields to narrow down the display of service items.



Figure: Service Items filtered for Manufacturer, Group, and Type

You have defined a filter and thus narrowed down the display of service items.

To delete the applied filter, click the **Reset Filter** option or press the **CTRL+ALT+SHIFT+F3** on the keyboard.