BEYOND

PERSONINCHARGE

User Guide

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Table of Contents

About BEYOND PersonInCharge

About this Extension

BEYOND PersonInCharge is an extension for Microsoft Dynamics 365 Business Central.
It was developed by:

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BEYOND PersonInCharge adds the **Person in Charge** field to your Business Central. You can assign a fixed person in charge to a customer or vendor. This person acts as a fixed contact person for customers and internal queries about documents.

The assigned person in charge is automatically stored in each document in Purchase, Sales and Service documents. You can also assign a person in charge to a user; all documents created by this user are automatically assigned to this person in charge.

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

> **NOTE**
>
> **No dependencies from or to other apps**
> No dependent applications are required to use BEYOND PersonInCharge, i.e. you do not need to install any additional applications.

Version	Date	Author	Comment
1.0	18.01.2023	Jannic Weidel	Initial version of the documentation
Access		public	

Continue with the next chapter

Assign User Permissions

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

Permission Set	Description
BYD PC ALL	This permission set enables the use of the **BeyondPersonInCharge** extension.

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

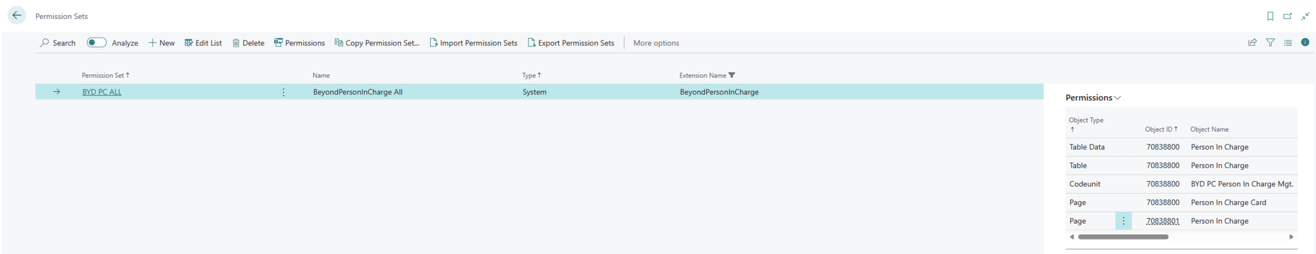

Figure: Permission Sets for BEYOND PersonInCharge

6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondPersonInCharge** as filter criteria.
8. The list is filtered to the permission sets of **BeyondPersonInCharge**.
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 PersonInCharge** 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 Person in Charge

This chapter describes how to create a person in charge in the system.
To create a person in charge, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Person in Charge** and click on the appropriate search result.
3. The **Person in Charge** list is displayed.
4. To create a new person in charge, click **New** in the menu bar.
5. The **Person in Charge** card is displayed.

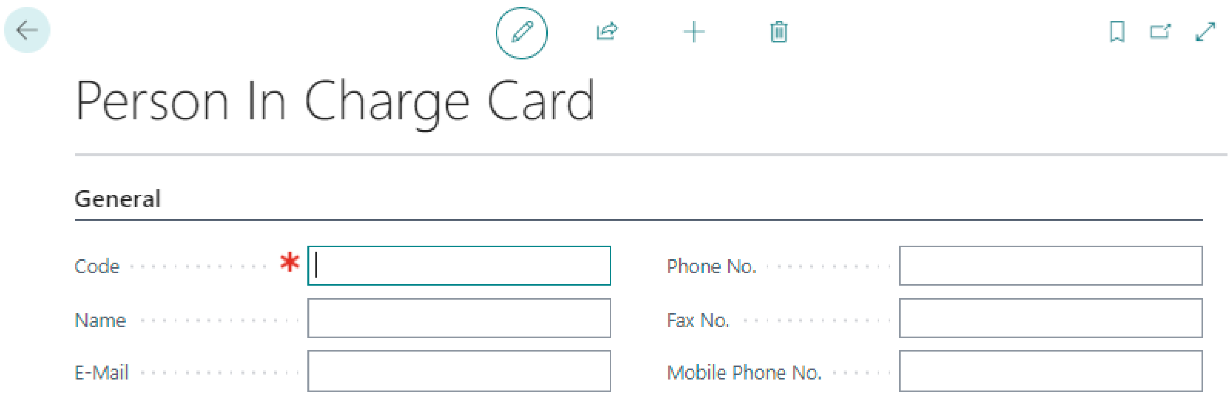

Figure: Person in Charge Card

6. Enter a code for the person in charge in the **Code** field.
7. In the **Name** field, enter the name of the person in charge.
8. In the **E-Mail** field, enter the email address of the person in charge.
9. In the **Phone No.** field, enter the phone number of the person in charge.
10. In the **Fax No.** field, enter the fax number of the person in charge.
11. In the **Mobile Phone No.** field, enter the mobile number of the person in charge.

You have created a person in charge.
For more information on how to assign the person in charge to a vendor, see the Assign Person in Charge to a Vendor chapter.

Assign Person in Charge to a User

This chapter describes how to assign a person in charge to a user.
To assign a person in charge to a user, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **User Setup** and click on the appropriate search result.
3. The **User Setup** list is displayed.
4. To assign a person in charge to a user, click **Edit** in the menu bar.
5. Click in the **Person In Charge Code** column for the appropriate user.

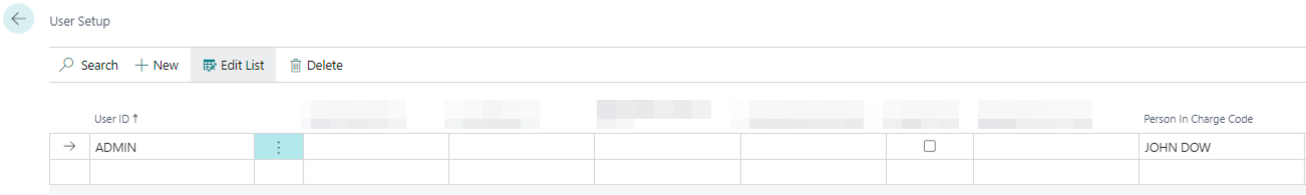

Figure: **Person In Charge Code** column in User Setup

6. Specify the person in charge you want to assign to this user.

You have assigned a person in charge to a user. The assigned person in charge will be added for all documents created by this user. Please note that individual settings such as the specification of a person in charge on the Customer Card or Vendor Card overwrite the setting for the user. When a document is created, the person in charge of the corresponding customer or vendor is used as a priority.

For information on how to create a person in charge, see the Create Person in Charge chapter.

Assign Person in Charge to a Vendor

This chapter describes how to assign a person in charge to a vendor.
To assign a person in charge to a vendor, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Vendors** and click on the appropriate search result.
3. The **Vendors** list is displayed.
4. Open the card of the vendor to whom you want to assign a person in charge.
5. On the vendor card, under the **General** tab, click in the **Person In Charge Code** selection field and select a person in charge. For more information on how to store a person in charge in the system, see the Create Person in Charge chapter.

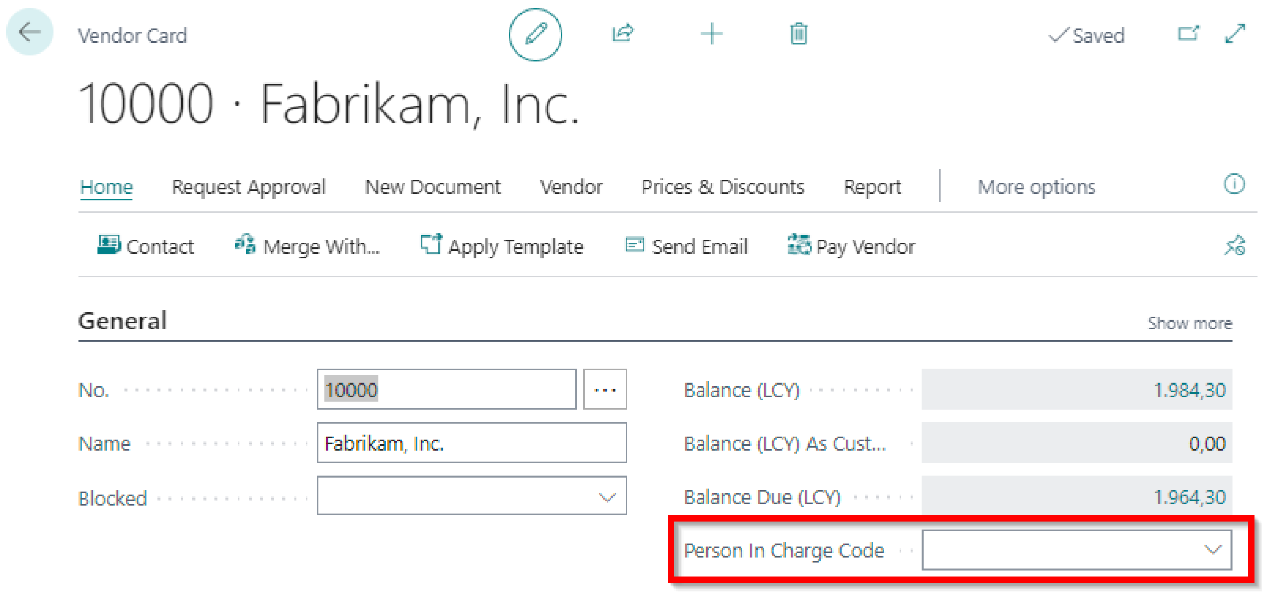

Figure: Assign Person in Charge to Vendor

You have assigned a person in charge to the vendor. The assigned person in charge is maintained in each document for this vendor.

> **NOTE**
>
> **Person in Charge for Vendors** By assigning a person in charge on the vendor card, this person in charge is primarily used in documents. The person in charge linked to the user is not used, even if this user creates the document for this customer.

> **NOTE**
>
> **BEYONDReports**
> If you use BEYOND Reports, the person in charge can even be printed in the documents.
> For more information on BEYOND Reports, please visit DOCS - Beyond Reports.

Assign Person in Charge to a Customer

This chapter describes how to assign a person in charge to a customer.
To assign a person in charge to a customer, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Customers** and click on the appropriate search result.
3. The **Customers** list is displayed.
4. Open the card of the customer to whom you want to assign a person in charge.
5. On the customer card, under the **General** tab, click in the **Person In Charge Code** selection field and select a person in charge. For more information on how to store a person in charge in the system, see the Create Person in Charge chapter.

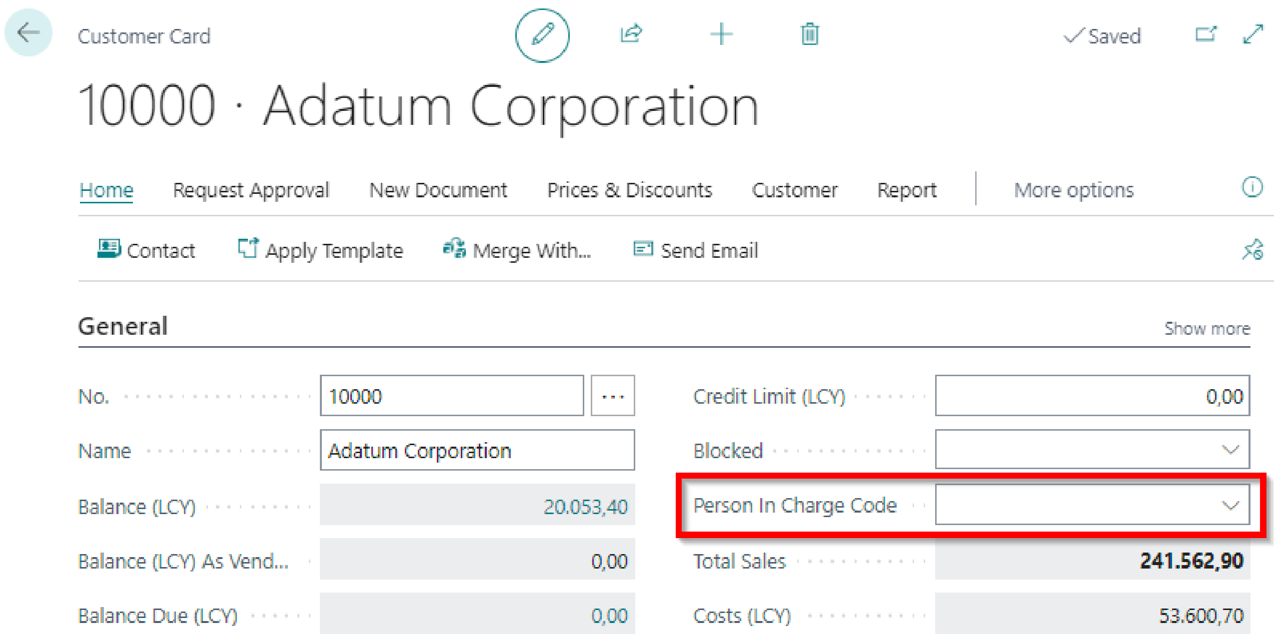

Figure: Assign Person in Charge to Customer

You have assigned a person in charge to the customer. The assigned person in charge is maintained in each document for this customer.

NOTE

Person in Charge for Customers By assigning a person in charge on the customer card, this person in charge is primarily used in documents. The person in charge linked to the user is not used, even if this user creates the document for this customer.

NOTE

BEYONDReports
If you use BEYOND Reports, the person in charge can even be printed in the documents.
For more information on BEYOND Reports, please visit DOCS - Beyond Reports.