



BEYOND

SERVICEITEMTRACKING

User Guide



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About BEYOND ServiceItemTracking

About this Extension

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

It was developed by:

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BEYOND ServiceItemTracking is used to track counter information (meter readings and locations) of service items.

This information allows you to maintain a history for your service items. By default, two counters are added for your service items when you install the application. If you would like to track additional counter readings for service items, please contact us.

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

NOTE

Dependencies on or to other apps

Additional, basic applications are required to use BEYOND ServiceItemTracking. The following applications are required to use BEYOND ServiceItemTracking:

- [BEYOND Attributes](#): Extends Business Central with an area for additional item characteristics (attributes).
- [BEYOND ManufacturerGroupType](#): Expands Business Central area with additional information such as manufacturer, group and type.
- [BEYOND AttributesMGTBridge](#): Application that enables functionalities between BEYOND Attributes and BEYOND ManufacturerGroupType.

Documentation Information

Version	Date	Autor	Comment
1.0	24.04.2023	Jannic Weidel	Initial (English) Version of the documentation
1.1	10.05.2023	Jannic Weidel	Added Chapter for assigning permission sets
Document Access		public	

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Assign User Permissions

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

Permission Set	Description
BYD SAT ALL	This permission set enables the use of the BeyondServiceltemTracking extension.

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

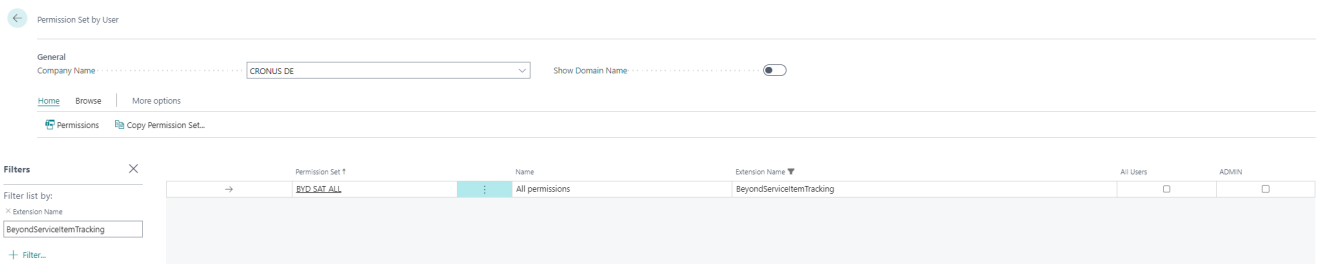


Figure: Permission Sets for BEYOND ServiceltemTracking

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

Edit Counter Names for Group

This chapter describes how to change the names of counters on service items.

To change the name for a counter for 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** list is displayed. On this page you will find all the groups for classifying service items in the system.
4. To rename/edit a counter for a specific group, click **Actions > Counter Namings** in the menu bar.
5. The **Counter Namings** page is displayed.

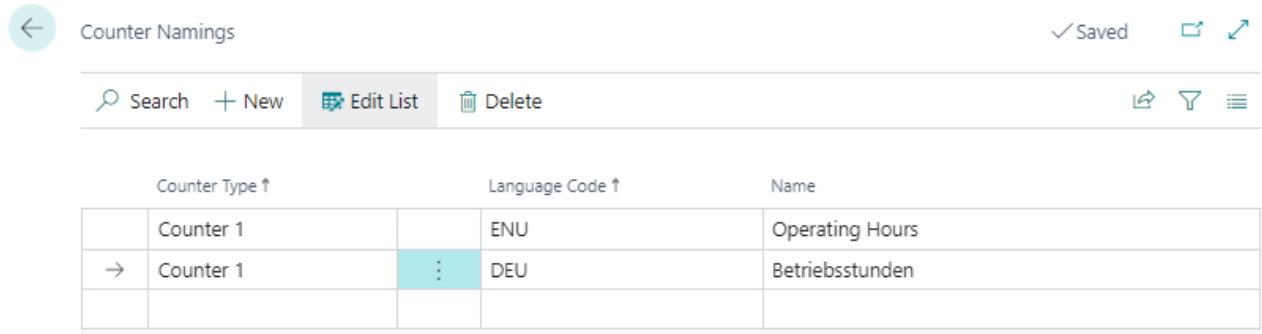


Figure: Change Counter Naming

6. To change the name of a counter, click the **New** option in the menu bar.
7. In the **Counter Type** column, select the counter for which you want to change the name.
8. In the **Language Code** column, specify the language in which you are changing the name of the counter.
9. Enter the name for the counter under the **Name** column.

You have changed the name of the counter for the selected group. the counter with the changed name is displayed on the service item list.

Hide Counter 2

This chapter describes how to hide the second counter for service items that is displayed by default.

Proceed as follows to hide the second counter for service items:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Attribute** and click on the corresponding search result.
3. The **Attributes** list is displayed. On this page you can find all the attributes created in the system.
4. Select the **Counter 2** attribute from the list.
5. Click **Edit** in the menu bar.
6. The attribute card is opened.
7. To hide counter 2 for service items, activate the **Blocked** option.

Counter 2 is hidden in the service item list and the service item card.

Enter Counter Value

This chapter describes how to enter a counter reading for a service item.

- [Enter Counter Value on Service Item Worksheet](#)
- [Enter Counter Value on Service Item List](#)
- [Enter Counter Value on Service Item Card](#)

Enter Counter Value on Service Item Worksheet

This section describes how to enter a counter reading (value) for a service item using the Service Item Worksheet.

1. Open the service order for the service item whose counter reading you want to maintain.
2. The service order is displayed.
3. To view the service item worksheet, select the service item under the **Lines** tab and click **Line** > **Service Worksheet** in the menu.

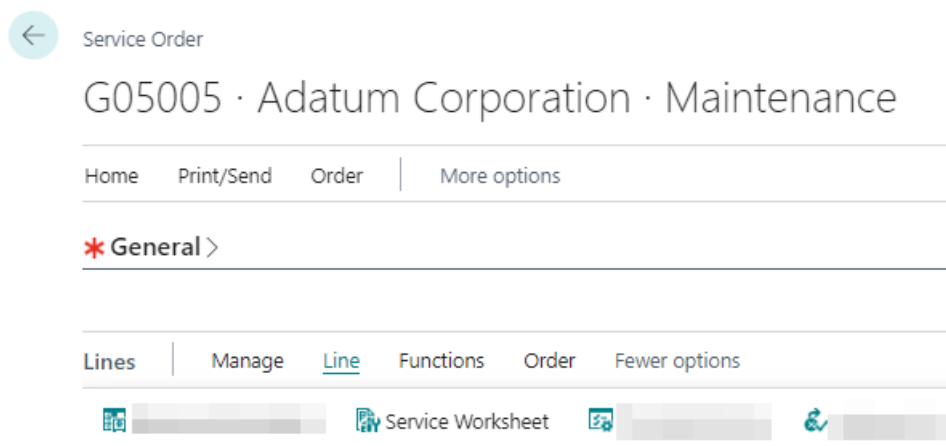


Figure: Enter Counter Value on Service Worksheet

4. Enter the counter value reading in the corresponding input field. The input field for the counter is located under the **General** tab.

You have entered a counter value reading for a service item. The current counter reading is displayed in the factbox area in the service item list and on the service item card.

Enter Counter Value on Service Item List

This section describes how to enter a counter reading (value) using the service item list.

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Service Items** and click on the corresponding search result.
3. The **Service Items** list is displayed.
4. To save a counter value for a service item, open the factbox (**ALT+F2**).
5. Enter the counter value in the input field in the factbox.

You have entered a counter value for a service item. The newest counter value is displayed in the factbox area in the service item list and on the service item card.

Enter Counter Value on Service Item Card

This section describes how to enter a counter value (meter reading) using the service item card.

1. Open the search function from the role center (**ALT+Q**).

2. Search for **Service Items** and click on the corresponding search result.
3. The **Service Items** list is displayed.
4. Open the corresponding service item card.
5. To save a counter value for a service item, click **Counter 1** on the menu bar.

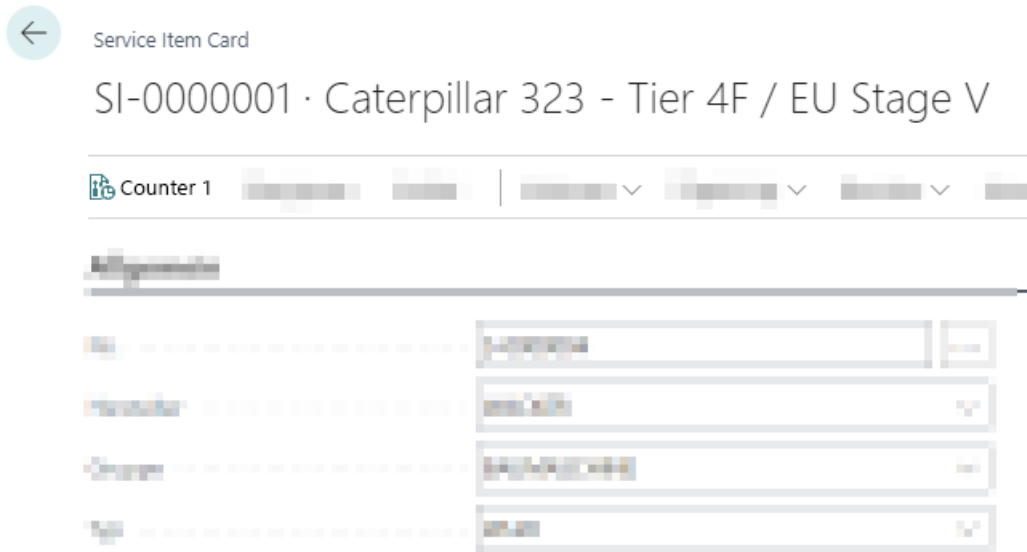


Figure: Add Counter Value on Service Item Card

6. The **Counter** page is displayed.
7. Enter the new counter value.

You have entered a new counter value. The current counter value is displayed in the factbox area in the service item list and on the service item card.