



BEYOND

SERVICEREQUISITION

User Guide



BEYONDIT GmbH

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

Table of Contents

About BEYOND ServiceRequisition

Setup

- Assign User Permissions

- Show Purchasing Code Column

Features

- Create Purchasing Code

- Create Special Order for Item in Service Item Worksheet

- Create Drop Shipment for Item in Service Item Worksheet

About BEYOND ServiceRequisition

About this Extension

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

It was developed by:

BEYONDIT GmbH

Schauenburgerstraße 116

24118 Kiel

Germany

moin@beyondit.gmbh

+49 431 3630 3700

Beyond ServiceRequisition extends the Service business area with the already known function of the Requisition Worksheet (from the Sales and Purchasing business areas).

You can use purchase codes (add the column with the personalization function) in the **Service Item Worksheet** (or **Service Worksheet**) for service lines and thus create a purchase order for the items in the service lines.

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

NOTE

No dependencies on or to other apps

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

Documentation Information

Version	Date	Autor	Comment
1.0	26.04.2023	Jannic Weidel	Initial (English) Version of the documentation
1.1	15.05.2023	Jannic Weidel	Added Chapter for assigning permission sets
Document Access		public	

[Next Chapter](#)

Assign User Permissions

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

Permission Set	Description
BYD SR USER	This permission set enables the use of the BeyondServiceRequisition extension.

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

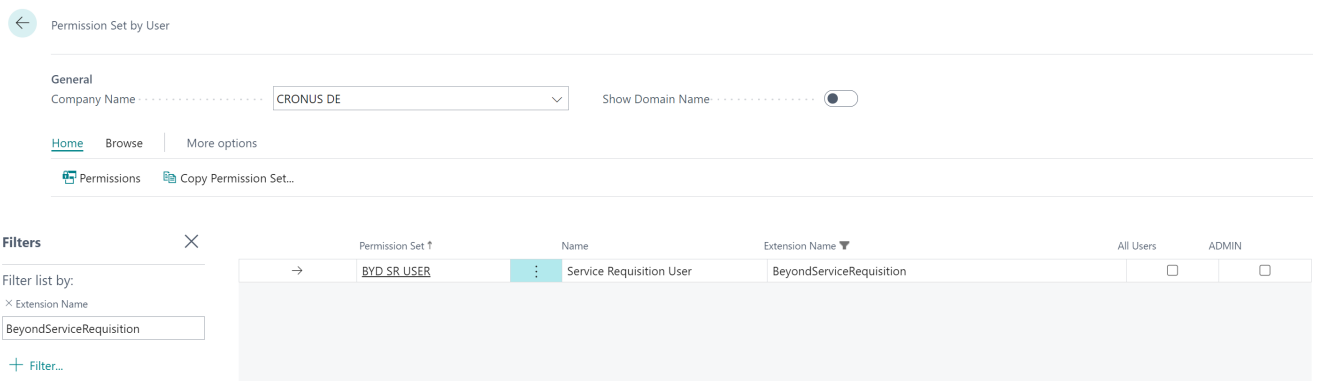


Figure: Permission Sets for BEYOND ServiceRequisition

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

Show Purchasing Code Column

This chapter describes how to show the **Purchasing Code** column in the Service Item Worksheet (Service Worksheet).

The purchasing codes are required to use the functions of **Beyond ServiceRequisition**.

For the following description, we assume that you have already created a service order.

To show the **Purchasing Code** column in the **Service Item Worksheet (Service Worksheet)** of the service order, do the following:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Service Orders** and click on the corresponding search result.
3. The **Service Orders** list is displayed. Select a service order and open the service order card.
4. Under the **Lines** tab, click the service item line.
5. To view the **Service Item Worksheet (Service Worksheet)**, click **Line > Service Item Worksheet (Service Worksheet)** in the menu.
6. The **Service Item Worksheet (Service Worksheet)** page is displayed.
7. To show the **Purchasing Code** column, click the gear icon at the top right of the screen.
8. Select **Personalize** from the menu.

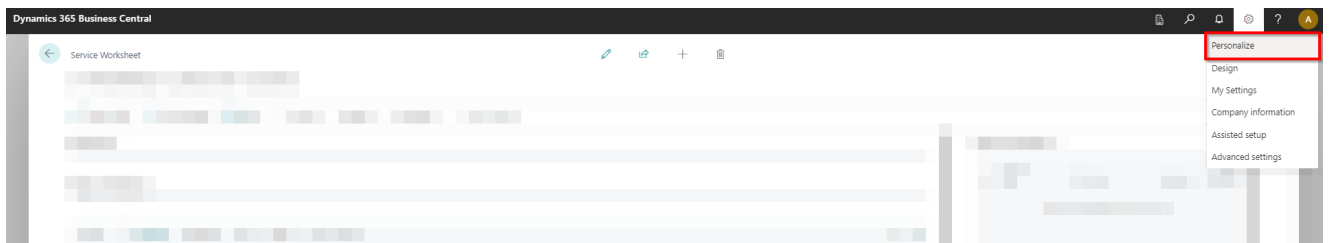


Figure: Personalize View

9. Click in the item line under the **Lines** tab.
10. To show the **Purchasing Code** column, click the **+ Field** option at the top of the screen.

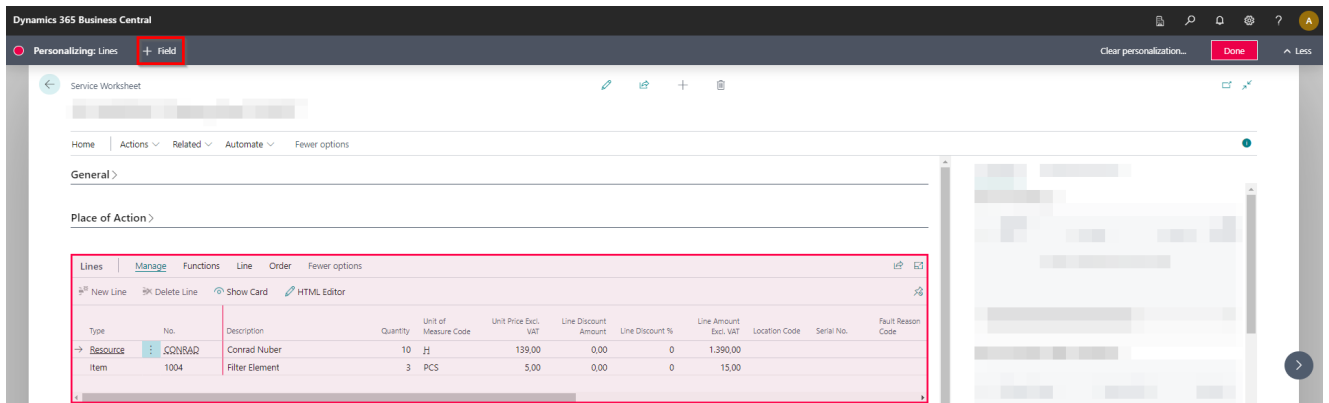


Figure: Personalize Service Item Worksheet (Service Worksheet)

11. The **Add Field to Page** area will appear on the right side of the screen.
12. Click on the magnifying glass icon and enter **Purchasing Code** in the input field.
13. Click with the left mouse button on the **Purchasing Code** tile and hold down the mouse button.
14. Drag the **Purchasing Code** tile under the **Lines** tab into the table header area.

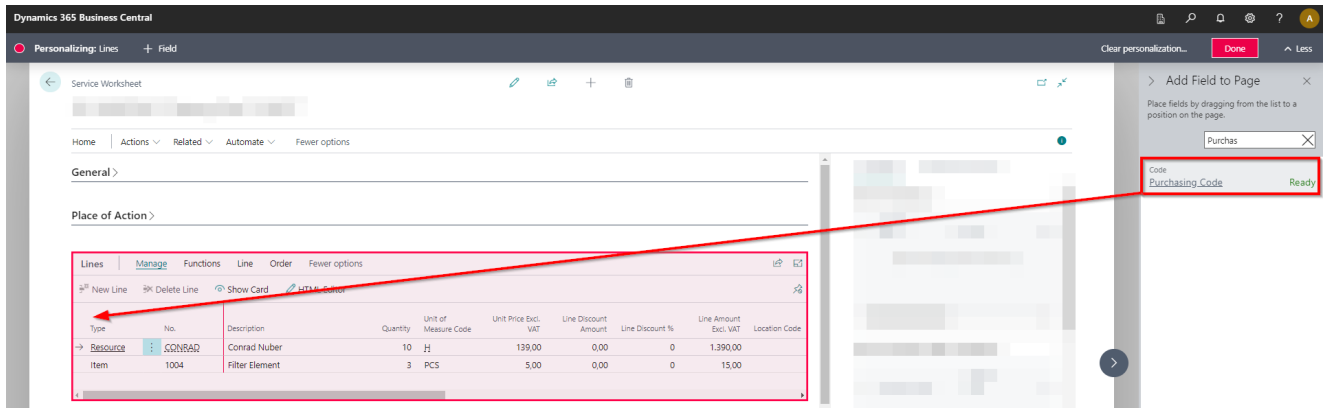


Figure: Show Purchasing Code column in Service Item Worksheet (Service Worksheet)

15. Release the mouse button when the following icon is displayed next to the mouse pointer and a red line indicates that the column can be added to the table.

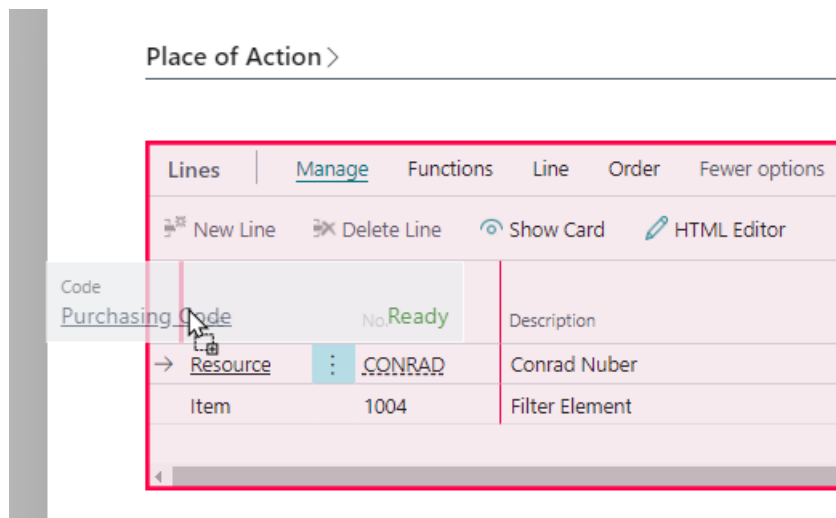


Figure: Drag and Drop the Column

16. You have added the **Purchasing Code** column to the **Service Item Worksheet (Service Worksheet)**.
17. To complete the personalization of the page and apply the change (i.e. the display of the **Purchasing Code** column), click **Done** at the top right of the screen.

You have shown the **Purchasing Code** column. You can use the column to define whether the item is to be ordered in the **Service Item Worksheet (Service Worksheet)** via a drop shipment or a special order.

For more information on how to create a purchasing code, please refer to the [Create Purchasing Code](#) chapter.

Create Purchase Code

This chapter describes how to create a purchase code to create either a drop shipment or a special order for an item.

To create a purchase code, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Purchase Codes** and click on the appropriate search result.
3. The **Purchase Codes** list is displayed.
4. To create a new purchase code, click **New** in the menu bar.
5. Enter a code for the new purchase code in the **Code** column.
6. In the **Description** column, enter a description for the new purchase code.
7. Select the check box for the **Drop Shipment** or **Special Order** column.

You have created a purchase code. You can use the available purchase codes in the lines of the **Service Item Worksheet** (**Service Worksheet**) to create a purchase order. For more information, see the chapters:

- [Create Special Order for Item in Service Item Worksheet](#)
- [Create Drop Shipment for Item in Service Item Worksheet](#)

Create Special Order for Item in Service Item Worksheet

This chapter describes how to create a special order for items in the Service Item Worksheet.

To create a special order for items in the Service Item Worksheet, do the following:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Service Orders** and click on the corresponding search result.
3. The **Service Orders** list is displayed.
4. Open the Service Order Card.
5. Under the **Lines** tab, open the **Service Item Worksheet (Service Worksheet)** for the service item.
6. To order an item for the service order via the Requisition Worksheet, select the purchase code for a special order under the **Purchase Code** column in the **Lines** tab of the **Service Item Worksheet (Service Worksheet)**. If the **Purchase Code** column is not displayed under the **Lines** tab, you can show the column as described in the [Show Purchase Code Column](#) chapter.

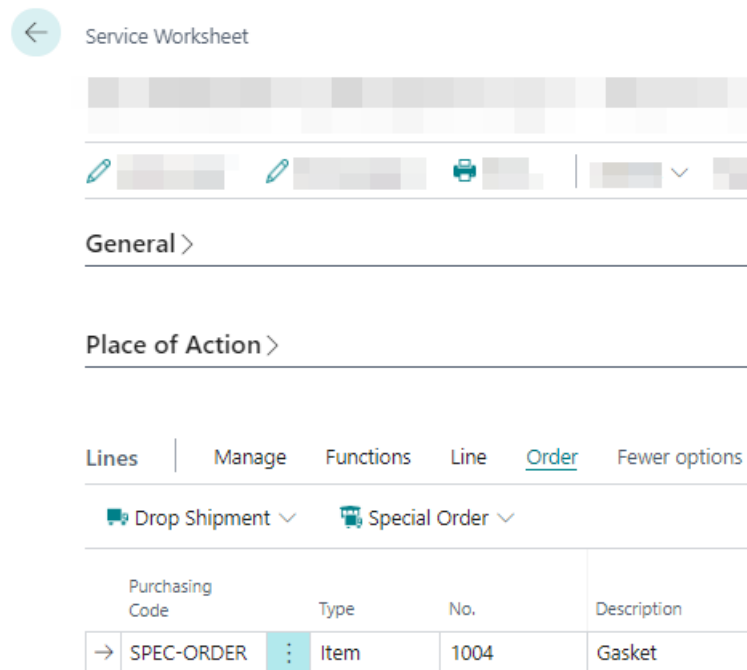


Figure: Specify a Purchase Code for Item Line in Service Item Worksheet (Service Worksheet)

7. Select the lines for which you want to create a special order.
8. Click the **Order > Special Order > Create Req. Worksheet** option in the menu.
9. The **Get Service Orders** window is displayed.

Get Service Orders



Use default values from Last used options and filters

Options

Retrieve dimensions from Item

Filter: Service Order Line

× Document Type Order

× Document No. G05004

× Purchasing Code SPEC-ORDER

× Special Order Yes

× Customer No.

× No.

+ Filter...

OK

Cancel

Figure: Get Service Orders

10. To transfer the service lines to the **Requisition Worksheets** page, click **OK**.

11. Die Seite **Bestellarbeitsblätter** wird angezeigt.

← Requisition Worksheets

Name

Manage [Home](#) Drop Shipment Special Order Line Item Availability by Report

Carry Out Action Message... Calculate Plan... Reserve

	Type	No.	Action Message	Acc... Acti... Mes...	Description	Location
→	Item	1004	New	<input checked="" type="checkbox"/>	Dichtungssatz	
	Item	1001	New	<input checked="" type="checkbox"/>	BEYOND Satz Schrauben	
	Item	1005	New	<input checked="" type="checkbox"/>	BEYOND Satz Runddichtring	
	Item	1008	New	<input checked="" type="checkbox"/>	BEYOND Reparatursatz Motor...	

Figure: Transferred Item Lines in the Requisition Worksheets

12. To create a purchase order, click **Home > Carry Out Action Message**.

13. The **Carry Out Action Msg. - Req.** dialog box is displayed.

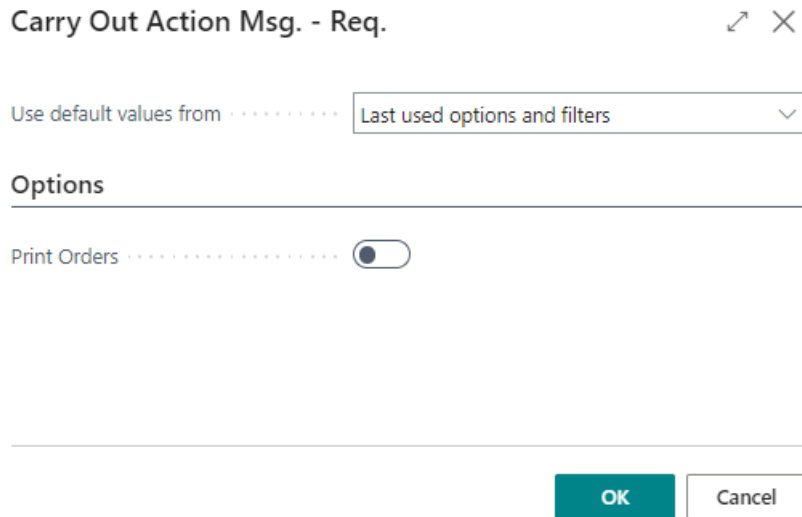


Figure: Carry Out Action Msg. - Req. dialog box

14. Click **OK**.
15. The purchase orders are created.

The purchase orders are linked to the item lines in the service order. You can navigate directly to the purchase order using the **Purchase Order** option in the **Service Item Worksheet (Service Worksheet)**.

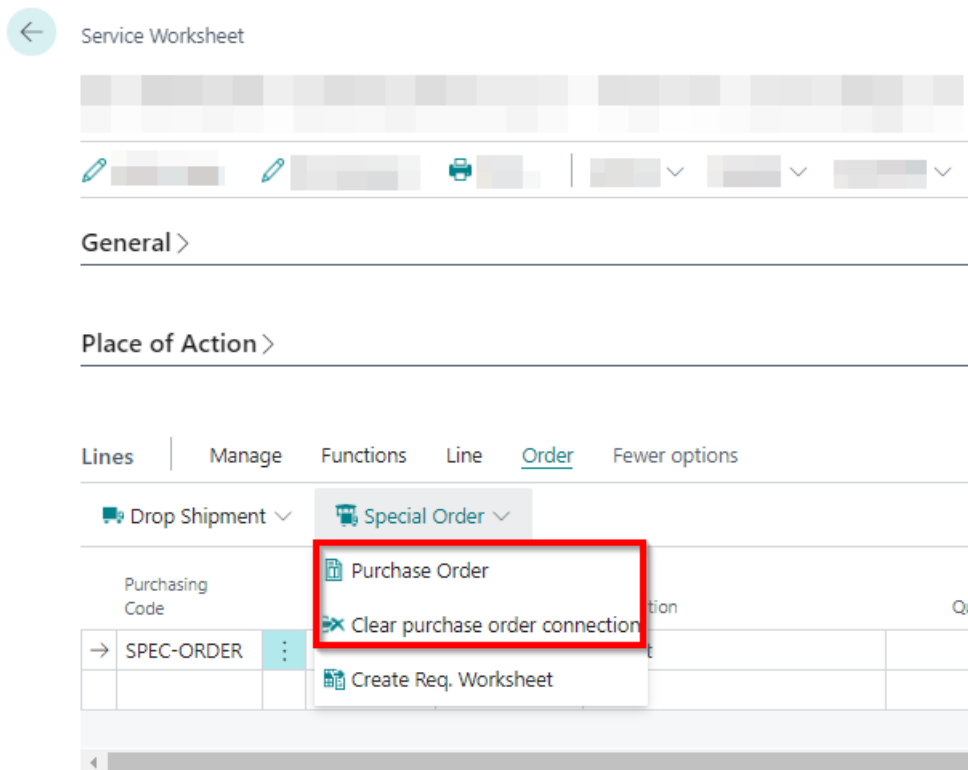


Figure: Link to Purchase Order

The corresponding option to navigate back to the service order is also available in the Purchase Order card.



Purchase Order



* General >

Lines | Manage | Line | Functions | Order | Fewer options

Drop Shipment ▾ Special Order ▾ Blanket Order

→	Item	
		Sales Order
		Service Order
		Clear Service Order Connection

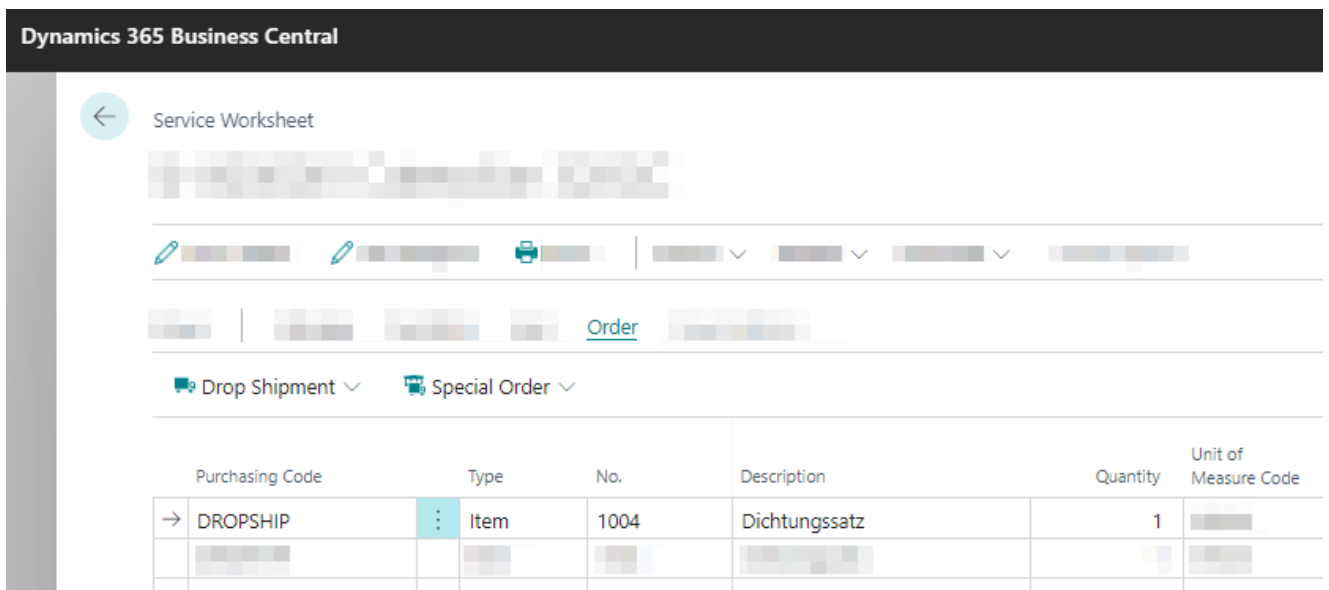
Figure: Link to Service Order

Create Drop Shipment for Service Item

This chapter describes how to create a drop shipment for items in the service item worksheet.

To create a drop shipment for items in the service item worksheet, do the following:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Service Orders** and click on the appropriate search result.
3. The **Service Orders** list is displayed.
4. Open the order card for the service order.
5. Under the **Lines** tab, open the **Service Item Worksheet (Service Worksheet)** for the service item.
6. To order an item for the service order via the order worksheet, select the purchase code for a direct delivery under the **Purchase Code** column in the **Lines** tab in the **Service Item Worksheet (Service Worksheet)**. If the **Purchase Code** column is not displayed under the **Lines** tab, you can show the column as described in the [Show Purchase Code Column](#) chapter.



Dynamics 365 Business Central

Service Worksheet

Order

Drop Shipment Special Order

Purchasing Code	Type	No.	Description	Quantity	Unit of Measure Code
→ DROPSHIP	Item	1004	Dichtungssatz	1	

Figure: Purchasing Code for Item Lines on Service Worksheet

7. Select the lines for which you want to create a direct delivery.
8. Click the **Order > Drop Shipment > Create Req. Worksheet** option in the menu.
9. The **Get Service Orders** window is displayed.

Get Service Orders



Use default values from Last used options and filters

Options

Retrieve dimensions from Item

Filter: Service Order Line

× Document Type Order

× Document No. G05001

× Purchasing Code DROPSHIP

× Drop Shipment Yes

× Customer No.

× No.

+ Filter...

OK

Cancel

Figure: Get Service Orders

10. To transfer the service lines to the **Requisition Worksheets** page, click **OK**.

11. The **Requisition Worksheets** page is displayed.

← Requisition Worksheets

Name

Manage [Home](#) Drop Shipment Special Order Line Item Availability by Report

Carry Out Action Message... Calculate Plan... Reserve

Type	No.	Action Message	Acc... Acti... Mes...	Description	Location
→ Item	1004	New	<input checked="" type="checkbox"/>	Dichtungssatz	
Item	1001	New	<input checked="" type="checkbox"/>	BEYOND Satz Schrauben	
Item	1005	New	<input checked="" type="checkbox"/>	BEYOND Satz Runddichtring	
Item	1008	New	<input checked="" type="checkbox"/>	BEYOND Reparatursatz Motor...	

Figure: Transferred Item Lines in Requisition Worksheets

12. To create a purchase order, click **Home > Carry Out Action Message....**

13. The **Carry Out Action Msg. - Req.** is displayed.

Carry Out Action Msg. - Req. ↗ ✕

Use default values from Last used options and filters ▼

Options

Print Orders

OK
Cancel

Figure: Carry Out Action Msg. - Req.

14. Click **OK**.
15. The purchase orders are created.

The purchase orders are linked to the item lines in the service order. You can navigate directly to the purchase order using the **Purchase Order** option in the **Service Item Worksheet (Service Worksheet)**.

← Service Worksheet

✎ ✎ 🖨 | ▼ ▼ ▼

General >

Place of Action >

Lines |
 Manage |
 Functions |
 Line |
 Order |
 Fewer options

Drop Shipment ▼ |
 Special Order ▼

📄 Purchase Order

✕ Clear purchase order connection

📄 Create Req. Worksheet

	No.	Description	Qu
→	[blurred]	[blurred]	
⋮	[blurred]	[blurred]	
→	[blurred]	[blurred]	

Figure: Link to purchase order

The corresponding option to navigate back to the service order is also available in the purchase order card.



Purchase Order

*** General >**

Lines | Manage | Line | Functions | Order | Fewer options

Drop Shipment Special Order Blanket Order

- Sales Order
- Service Order
- Clear Service Order Connection

Figure: Link to Service Order