BEYOND

SERVICEWORKSHEET

User Guide

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About BEYOND ServiceWorksheet

About this extension

BEYOND ServiceWorksheet is an extension for Microsoft Dynamics 365 Business Central.
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The latest version of this documentation can be found at the following link: BEYOND ServiceWorksheet Documentation.

> **NOTE**
>
> **Dependencies on or to other apps**
> Additional, basic applications are required to use BEYOND ServiceWorksheet. The following applications are required to use BEYOND ServiceWorksheet:

- BEYOND License: Management of trial and full licenses for apps of BeyondIT.

Version	Date	Autor	Comment
1.0	06.01.2025	Jannic Weidel	Initial version of the documentation
Access		public	

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Assign User Permissions

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

Permission Set	Description
BYD SW USER	This permission set enables the use of the **BeyondServiceWorksheet** extension.
BYD SW ADMIN	This permission set enables the use of the **BeyondServiceWorksheet** extension and grants administrative access to the setup pages of the app.

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

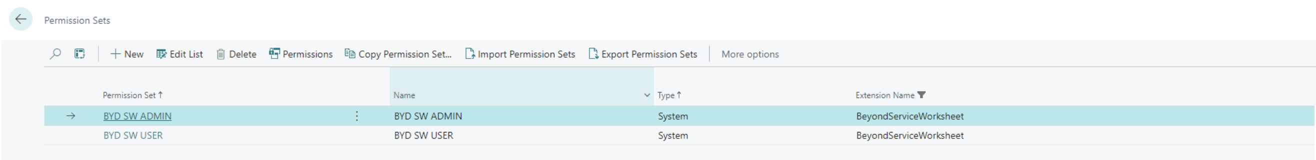

Figure: Permission Sets for BEYOND ServiceWorksheet

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

This chapter describes how to create a resource group and assign this resource group to a resource.

Resource groups are used in **Beyond ServiceWorksheet** to enable the grouping of service lines in the service grouping. For more information on service grouping setups and the options for grouping, see the chapter Create Service Grouping Setups.

The contents of this chapter are divided into the following sections:

- Create Resource Group
- Assign a Ressource to a Ressource Group

Create Resource Group

To create a resource group, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Ressource Groups** and click the corresponding search result.
3. The **Ressource Groups** list is displayed.

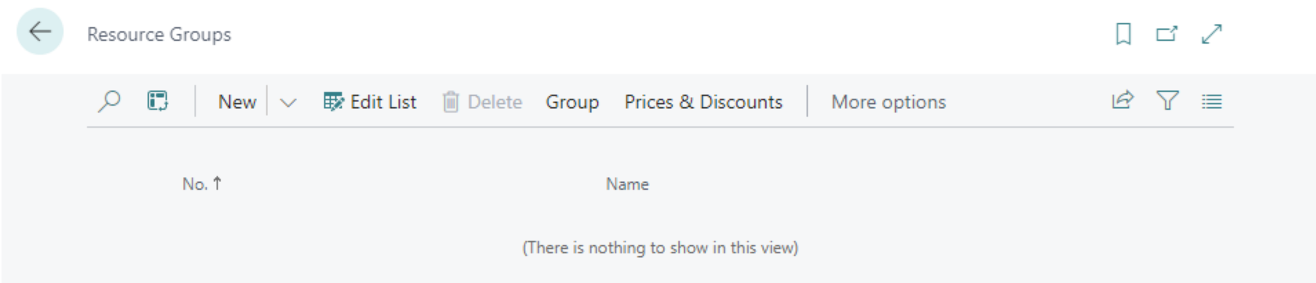

Figure: Resource Groups

4. Click on the **New** option in the menu bar to create a new resource group.
5. Enter a number for the resource group in the **No.** column.
6. Enter a name for the resource group in the **Name** column.

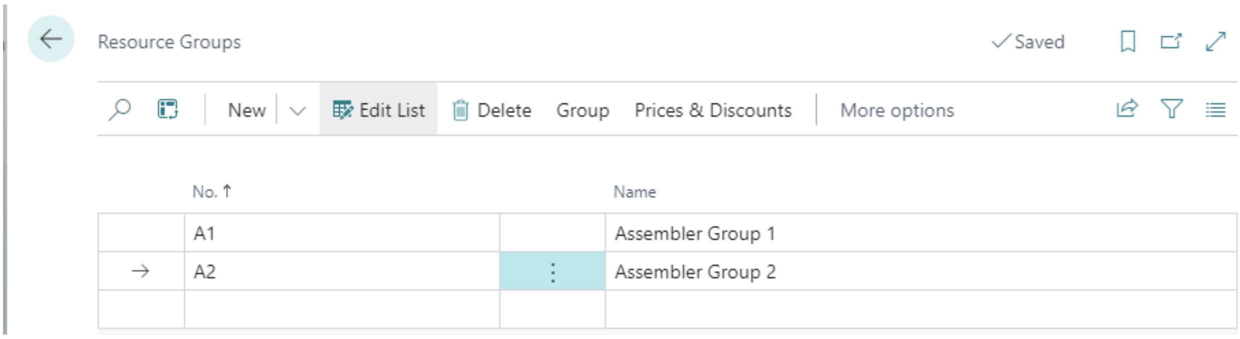

Figure: Created Resource Groups

You have created one or more resource groups. The following section describes how to assign a resource to a resource group.

Assign a Ressource to a Ressource Group

To assign a resource to a resource group, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Resources** and click on the corresponding search result.
3. The **Resources** list is displayed.

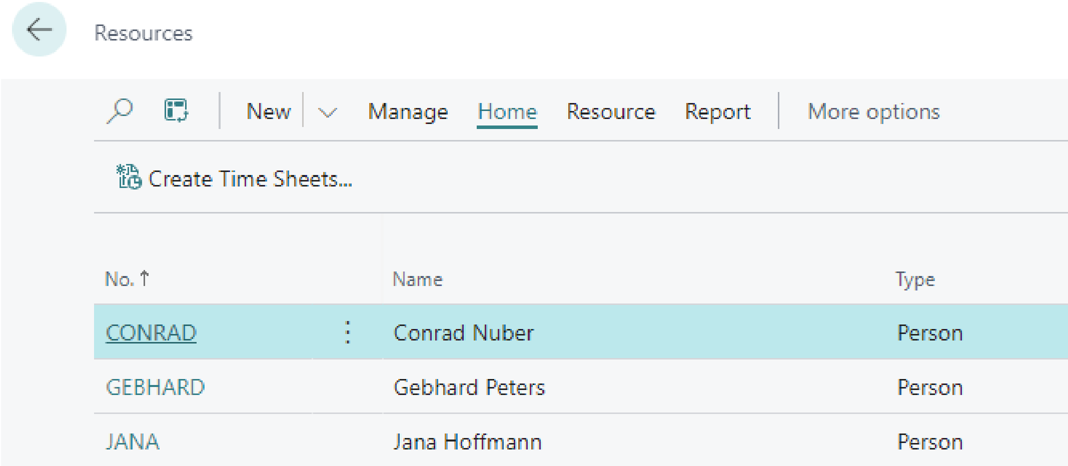

Figure: Ressources

4. In the list, click on the resource that you would like to assign to a resource group.
5. The **Resource** card is displayed.

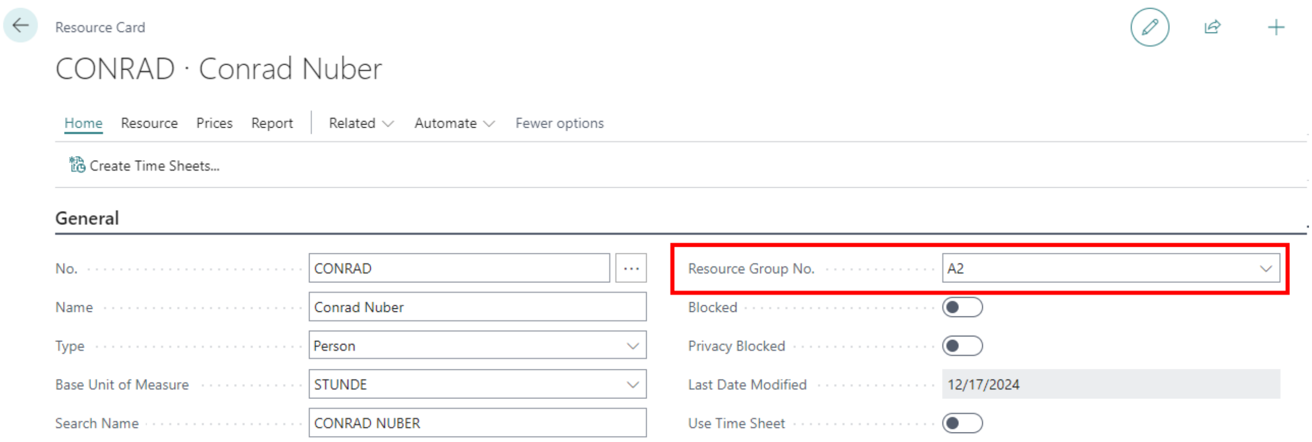

Figure: Resource Card

6. In the **Resource Group No.** dropdown field, select the resource group to which the selected resource is to be assigned.

NOTE

If the **Resource Group No.** field is not displayed, you must show the field using the **Personalize** function. You can find further information on this in the Microsoft standard help for Business Central under the chapter Personalize your workspace.

You have assigned one or more resources to a resource group. If you are using a service grouping facility by resource group and work type, you must assign a work type to the service worksheet lines. You can find more information on this in the chapter Create Work Type.

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Create Work Type

This chapter describes how to create a work type and assign a work type to lines.

Work types are used in **Beyond ServiceWorksheet** to enable service lines to be grouped in the service grouping. For more information on service grouping setups and the options for grouping, see the chapter Create service grouping setups.

The contents of this chapter are divided into the following sections:

- Create Work Type
- Assign Service Worksheet Lines to a Work Type

Create Work Type

To create a work type, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Work Types** and click on the corresponding search result.
3. The **Work Types** list is displayed.

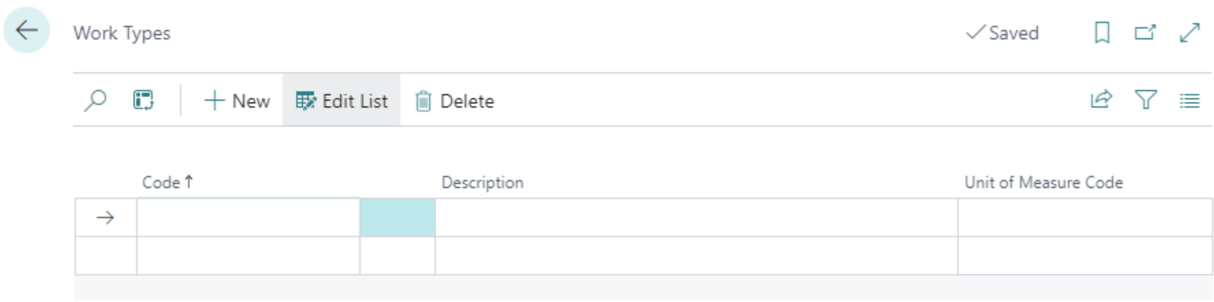

Figure: Work Types

4. Under the **Code** column, enter a code for the work type you want to create.
5. Enter a description for the work type in the **Description** column.
6. Enter the code of a unit for the work type in the **Unit of Measure code** column.

You have created a work type. The following section uses an example service order to show you how to assign a work type to lines.

Assign Service Worksheet Lines to a Work Type

This section describes how to assign work slip lines to a work type.

To assign service worksheet lines to a work type, proceed as follows:

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. In the list, click on the service order for which you want to assign a work type to certain lines in the service worksheet.
5. The service order card is displayed.
6. Select the corresponding service item line under the **Lines** area and click **Line** > **Service Worksheet** in the menu bar.
7. The Service Worksheet is displayed.
8. You can specify a work type for the resource lines under the **Work Type Code** column.

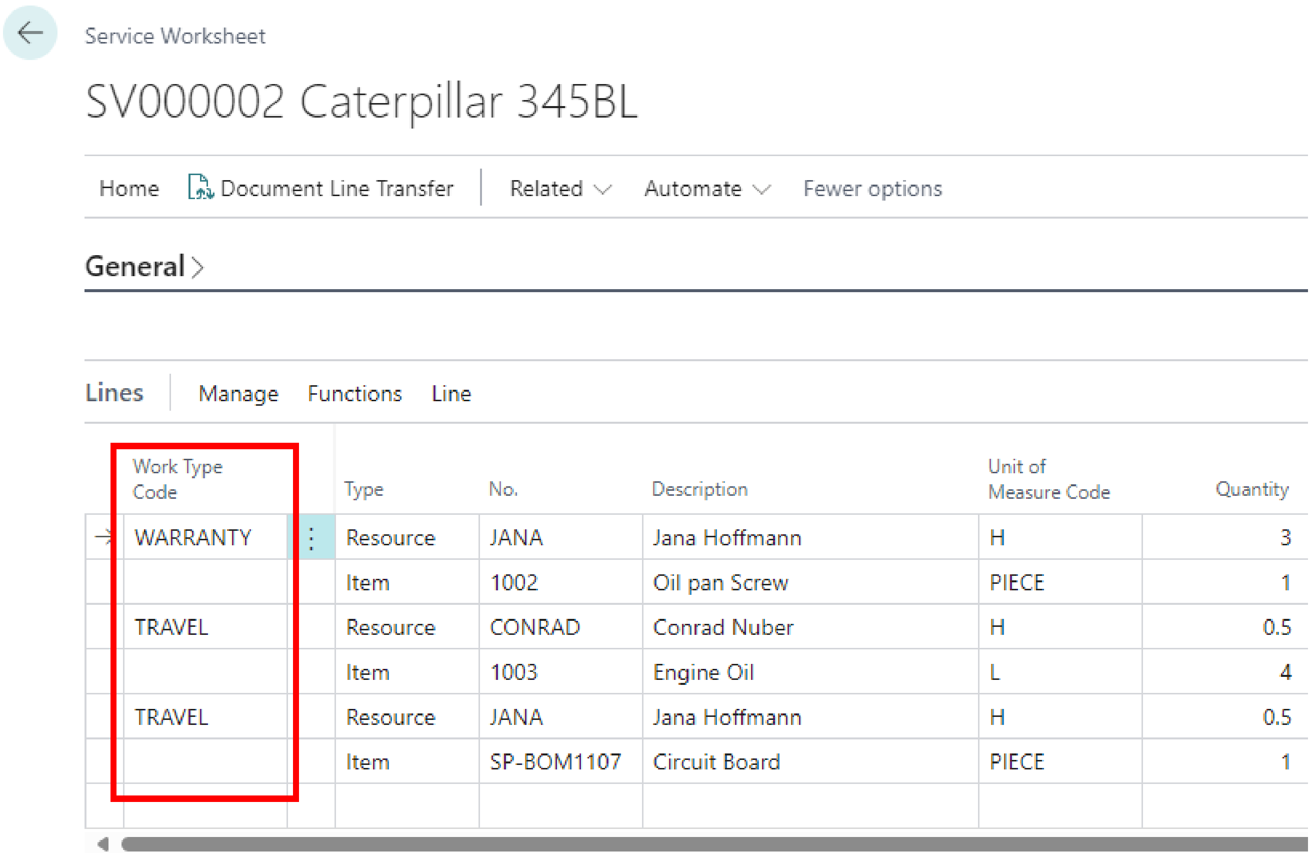

Figure: Service Worksheet Lines with Work Type

> **NOTE**
>
> If the **Work Type Code** field is not displayed, you must show the field using the **Personalize** function. You can find further information on this in the Microsoft standard help for Business Central under the chapter Personalize your workspace.

You have assigned one or more lines to a work type. If you are using a service grouping setup by work type and resource group, you must assign resources to the resource group. For more information, see the chapter Create and assign resource group.

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Create Service Grouping Setups

This chapter describes how to create a service grouping setup. Service grouping setups are used to group the service worksheet lines for a service order line in a service document (e.g. a service order) and sort them according to the setup. The groupings sort the service worksheet lines, giving you a better overview.

> **NOTE**
>
> You must have the appropriate permission set (**BYD SW ADMIN**) for the following description. If you do not have this permission set, instruct your administrator to grant you the permission set or create a service grouping setup according to these instructions, which you can then use. Further information on permission sets can be found in the chapter Assign User Permissions.

To create a service grouping setup, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Service Grouping Setups** and click on the corresponding search result.
3. The **Service Grouping Setups** list is displayed.

Figure: Service Grouping Setups

4. To create a new service grouping setup, click on **New** in the menu bar.
5. Enter a code for the new service grouping setup under the **Code** column.
6. Enter a description for the service grouping setup under the **Description** column. In the following two steps, you define the levels for the groupings of the service worksheet lines.
7. Select one of the following values under the **Grouping Level 1** column:
    - **None**: Select this value so that no grouping is carried out in the first level.
    - **Ressource Group**: Select this value to group by resource group in the first level. For more information on how to create a resource group and assign it to a resource, see the chapter Create and Assign Resource Group.
    - **Work Type**: Select this value to group by work type in the first level. For more information on how to create a work type and assign a service line to this work type, see the chapter Create Work Type.
8. Select one of the following values under the **Grouping Level 2** column:
    - **None**: Select this value so that no grouping is carried out in the second level.
    - **Ressource Group**: Select this value to group by resource group in the second level. For more information on how to create a resource group and assign it to a resource, see the chapter Create and Assign Resource Group.
    - **Work Type**: Select this value to group by work type in the second level. For more information on how to create a work type and assign a service line to this work type, see the chapter Create Work Type.
9. Activate the checkbox under the **Total Sum** column to set that a total sum is displayed in the overview.

You have created a Service Grouping Setup.

On the customer card, you can define which **Service Grouping Setup** is to be used by default for the customer. You can find more information on this in the chapter Set default service grouping setup for customer.

On the service document (service order), you can store a service grouping setup under the **Service Grouping Code** field or change a default service grouping. You can find further information on this in the chapter Edit Service Grouping on Document.

Define Default Service Grouping Setup for Customer

This section describes how to set a service grouping setup to be used as default for a customer.

To set a service grouping setup to be used by default, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Customers** and click on the corresponding search result.
3. The **Customers** list is displayed.

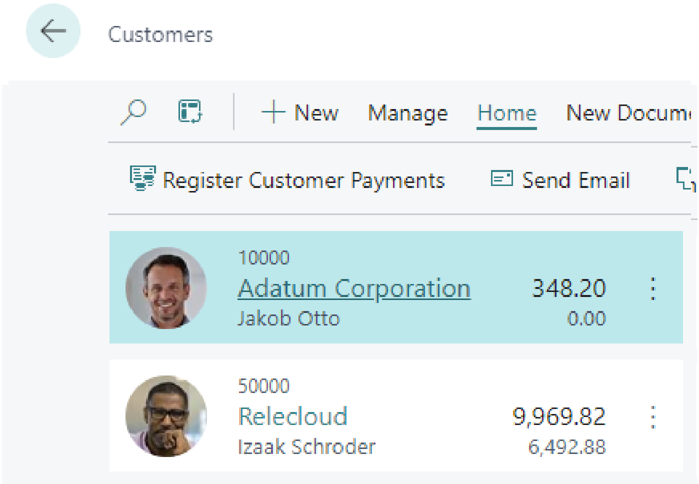

Figure: Customers

4. Select a customer from the list and open the customer card.
5. The Customer card is displayed.

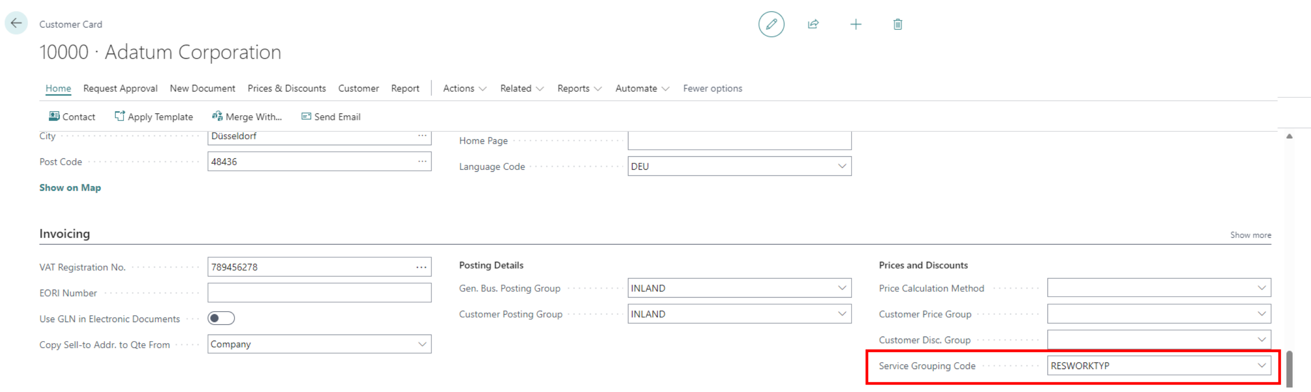

Figure: Customer Card

6. Enter the code of the service grouping setup in the **Service Grouping Code** field under the **Invoicing** section.

You have set the default service grouping to be used for this customer. The service grouping is automatically pre-assigned in service documents.

For more information on how to change the default service grouping setup in documents, please refer to the chapter Change service grouping on document.

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Edit Service Grouping on Document

This chapter describes how to change the service grouping on a service document.

To change the service grouping on a service order, proceed as follows:

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. Select the service order for which you want to change the service grouping.
5. The service order card is displayed.
6. Scroll to the **Invoicing** area and change the value under the **Service Grouping Code** field to your preferred service grouping.

You have changed the service grouping for the service order.

View Service Grouping

This chapter describes how you can display the service grouping.

To display the service grouping, proceed as follows:

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. Select the service order for which you want to display the service grouping.
5. Click on the **Service Grouping** option in the menu bar.

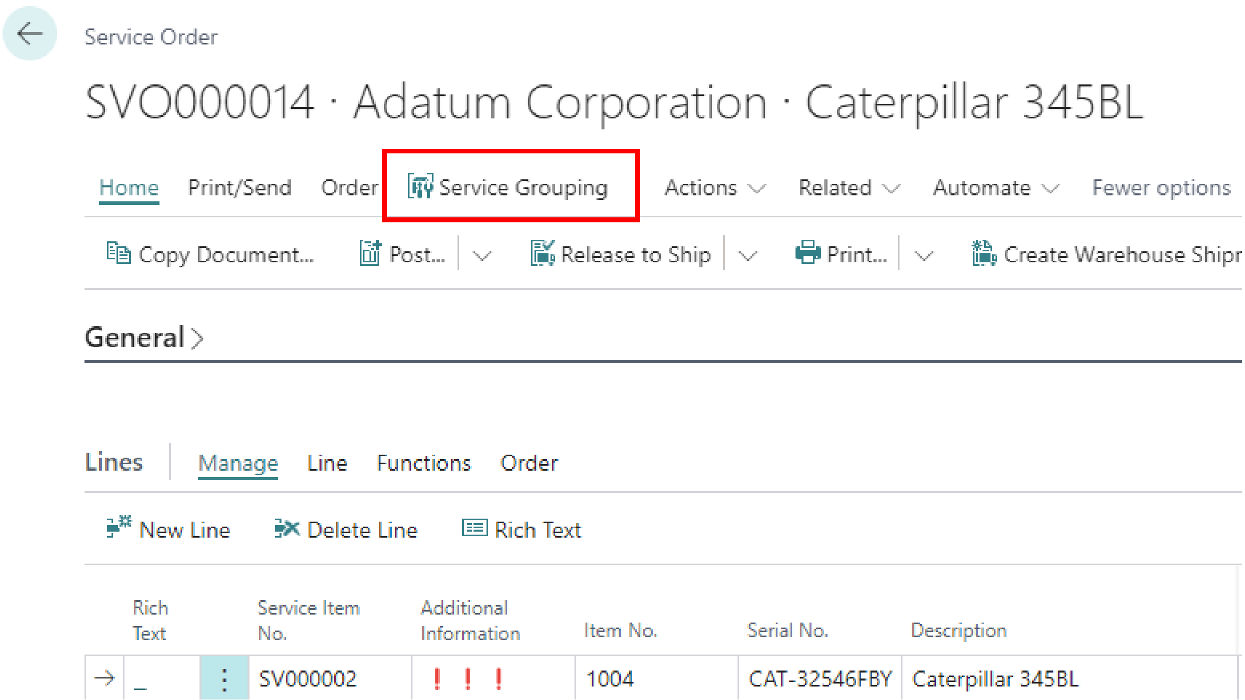

Figure: View Service Grouping

6. The **Service Grouping** page is displayed.

Figure: Service Grouping

On the **Service Grouping** page, the service worksheet lines for the service item are displayed grouped together. The display of the lines and the sorting depends on the settings of the selected service grouping. For more information on the available settings and how to change the service grouping for a document, see the chapters Create service grouping setups and Edit service grouping on document.

License Management

This chapter describes how you can view the license management of **Beyond ServiceWorksheet**.

To view the status of the product license for **Beyond ServiceWorksheet**, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Beyond License Management**.
2. The **Beyond License Management** page is displayed.

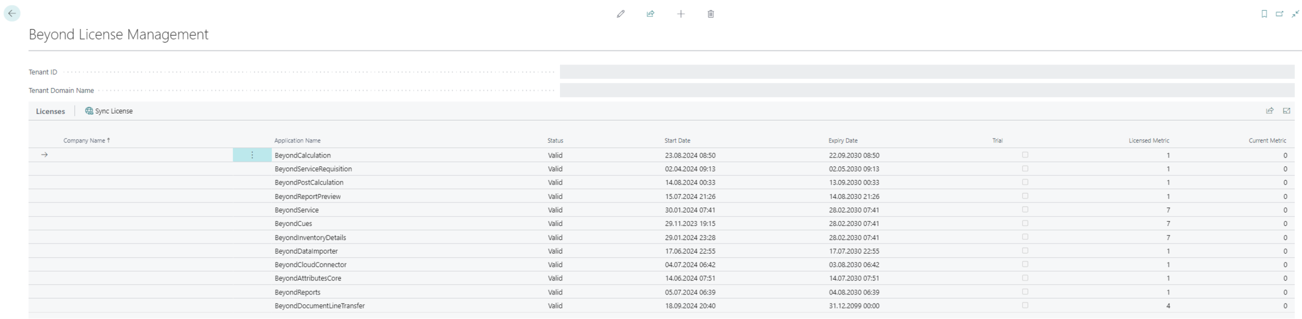

Figure: License Management

3. Under the **Licenses** section, you will find all product licenses for BeyondIT applications that have been installed for this company. You can read all the necessary information from the values in the columns:

Column	Description
Company Name	This column indicates the name of the company.
Application Name	This column indicates the name of the application. If you use several BeyondIT products, a separate line is displayed for each product in the overview,
Status	This is the status of the product license. Several values are possible: **Valid**: The product license is valid and the application can be used without restrictions. **Expired**: The product license has expired. The application can no longer be used. **Trial**: The product license is valid and the functionalities of the application can be used for a short period of time (note the value in the **expiry date** column) with restrictions or without restrictions. **Exceeded**: The product license has expired. The application can no longer be used.
Start Date	This is the date on which the product license was registered.
Expiry Date	This is the date on which the product license becomes or became invalid. The application can no longer be used.
Trial	This checkbox indicates whether the product license is a trial license. Trial licenses are very limited licenses. You can purchase a full product license after the trial license expires (note the value in the **Expiry date** column).
Licensed Metric	This column shows how the application was licensed. For example, this can be a tenant license, a license per company or a license per user.
Current Metric	This column shows how many licenses are used in the environment. The difference between the values in the **Licensed metric** and **Current metric** columns indicates whether you need to purchase an additional license.