BEYOND

SERVICEREQUISITION

User Guide

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Preface

This documentation contains information on how to install and operate **Beyond ServiceRequisition** in your Business Central environment.

This documentation is intended for experienced users of Business Central. Additional knowledge of third-party software products may be required to set up **Beyond ServiceRequisition**.

Read this documentation in full to set up **Beyond ServiceRequisition** and work with it professionally. Pay particular attention to the tips, information and safety instructions contained in the documentation. Inform your employees about the proper use of **Beyond ServiceRequisition** and keep the documentation in a place that is accessible to your employees.

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Manufacturer

Beyond ServiceRequisition is developed by:

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Version history

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
1.2	13.06.2025	Jannic Weidel	Added Preface Chapter
Document Access		public	

General Information

This documentation contains important information that you must observe when following the descriptions. The information is highlighted as notes and arranged according to type and importance. The notes are listed below in ascending order of importance:

TIP

This represents **no risk**. In addition to the classic clicking on options, Business Central also offers the option of using so-called shortcuts. Shortcuts are key combinations with which you can also execute the desired action in the user interface. By using shortcuts, you can work faster and more effectively. Try the key combination and you will be surprised how much faster you can work.

NOTE

This represents **no risk**. This note contains important information on the correct use, configuration or operation of the software. Follow these instructions to avoid inefficiencies and unnecessary support tickets. For example, this note can show you that an option is hidden and tells you how to proceed if you want to show it again.

IMPORTANT

This represents a **low risk**. This notice refers to non-critical issues that may lead to undesired behavior or configuration problems.
May affect user experience or functionality if not considered.

CAUTION

This represents a **medium risk**. This notice indicates a potential problem that could affect system stability or data integrity.
Failure to comply may result in errors, loss of performance or partial service interruptions. The errors caused by non-compliance only affect the app itself and prevent you from working with data within the app.

WARNING

This represents a **high risk**. This notice indicates an immediate and serious risk to the productive system.
Failure to observe this warning may affect the entire system. There is a risk of loss of critical data or total system failure, leading to prolonged downtime. It may not be possible to restore the data and a backup must be imported.

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

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.

The examples described in this documentation represent only a part of the possibilities that the **Beyond ServiceRequisition** 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 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
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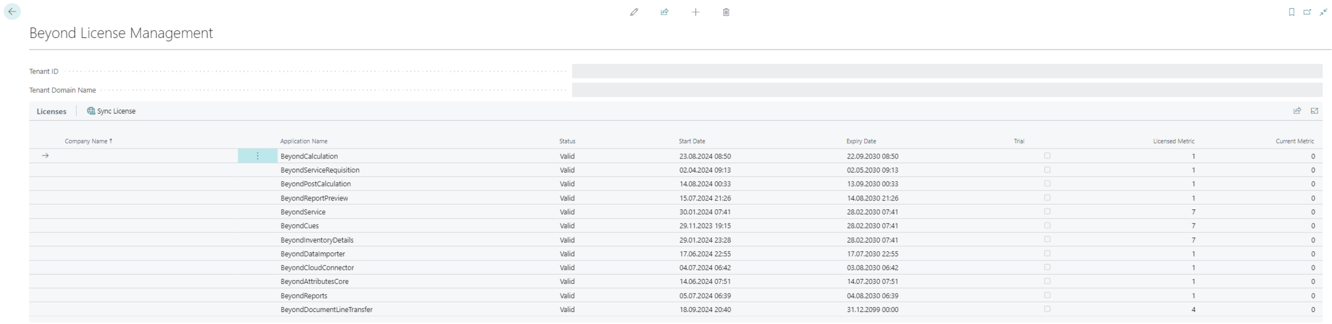
License Management

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

To view the status of the product license for **Beyond ServiceRequisition**, 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.



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.

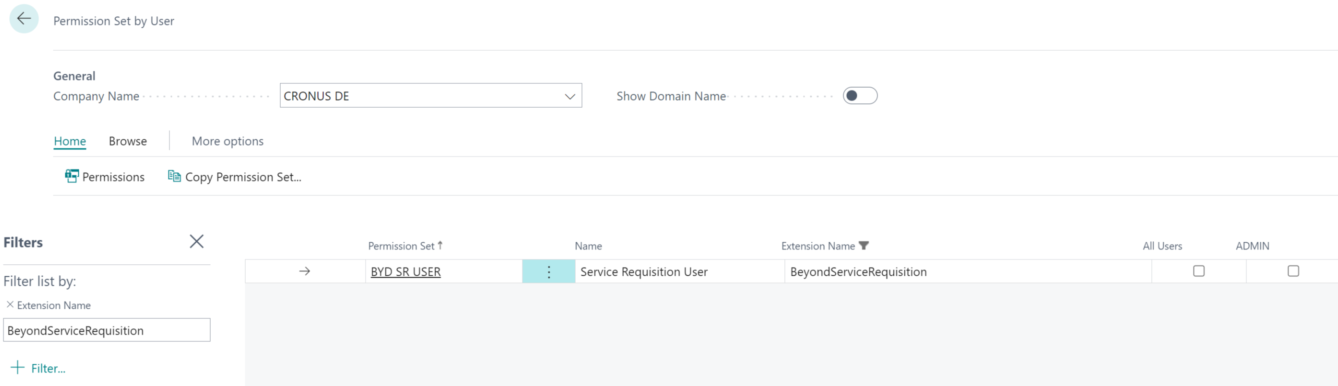
Assign User Permissions

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.



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.

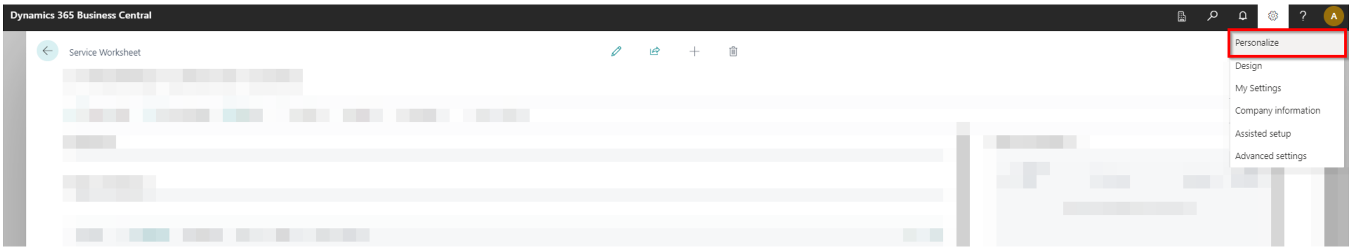
You have assigned a permission set for **BEYOND ServiceRequisition** to a user. Note that users with the **SUPER** permission set have all rights, i.e. you do not need to give this user any additional rights.

Show Purchasing Code Column

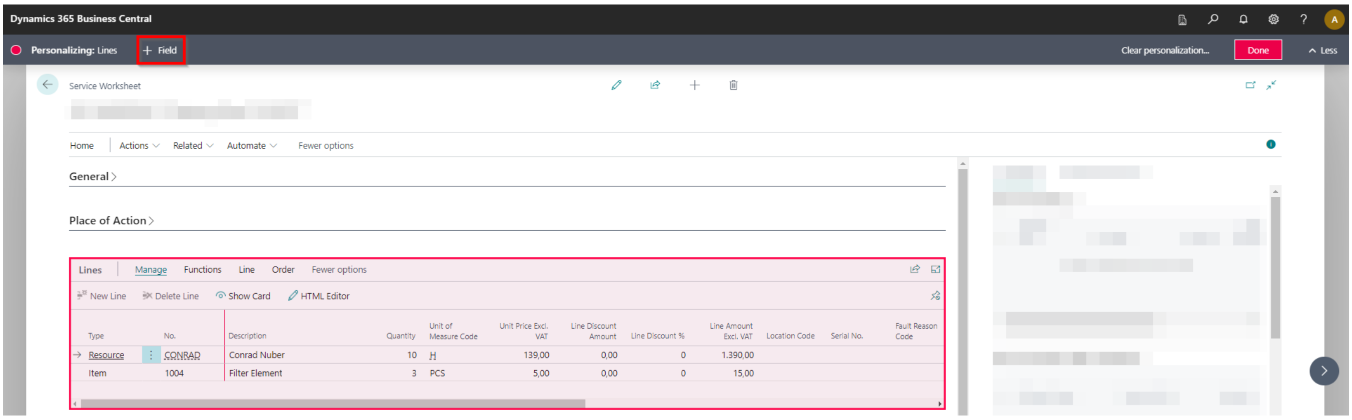
This chapter describes how to show the **Purchasing Code** column in the Service Item Worksheet (Service Worksheet). The purchasing codes are required to use the functions of **Beyond ServiceRequisition**.
For the following description, we assume that you have already created a service order.

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

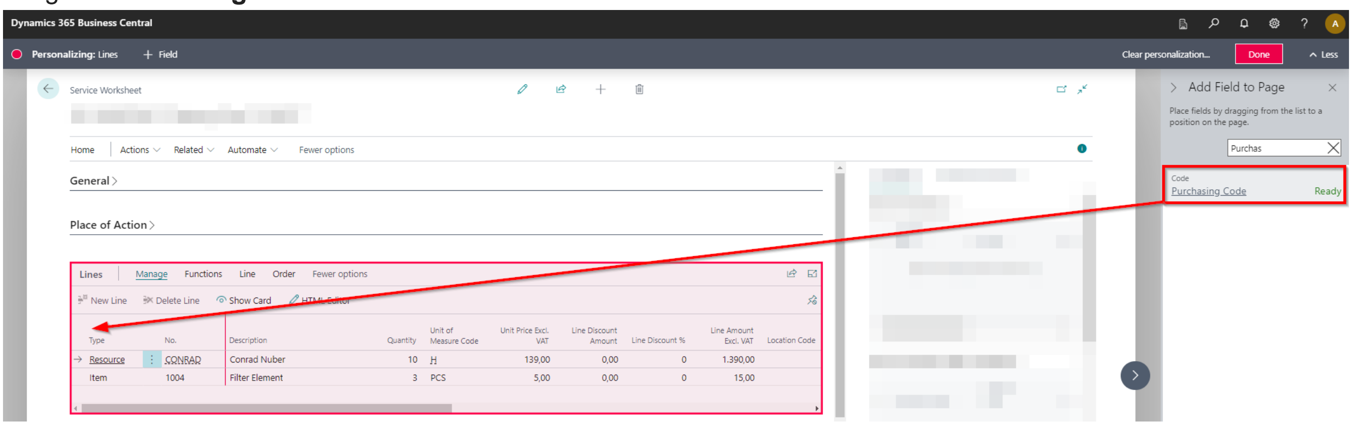
1. Open the search function from the role center (**ALT+Q**).
2. Search for **Service Orders** and click on the corresponding search result.
3. The **Service Orders** list is displayed. Select a service order and open the service order card.
4. Under the **Lines** tab, click the service item line.
5. 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.



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.

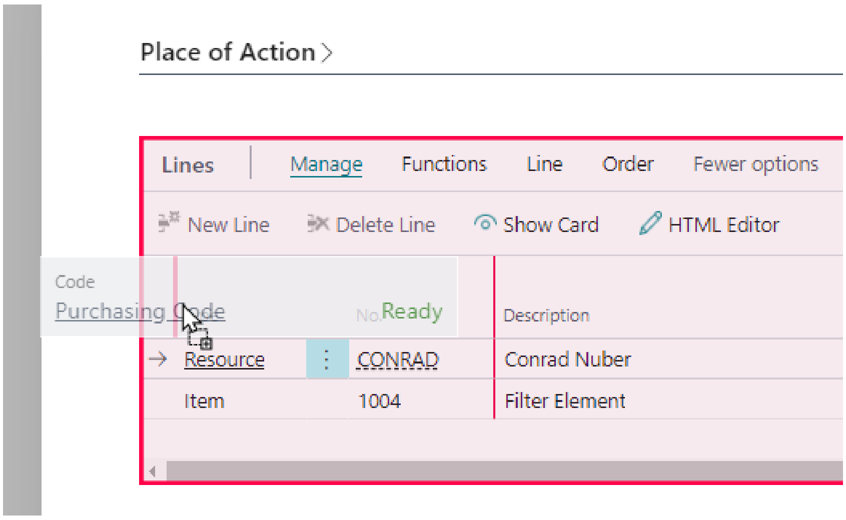


11. The **Add Field to Page** area will appear on the right side of the screen.
12. Click on the magnifying glass icon and enter **Purchasing Code** in the input field.
13. Click with the left mouse button on the **Purchasing Code** tile and hold down the mouse button.
14. Drag the **Purchasing Code**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



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.



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.

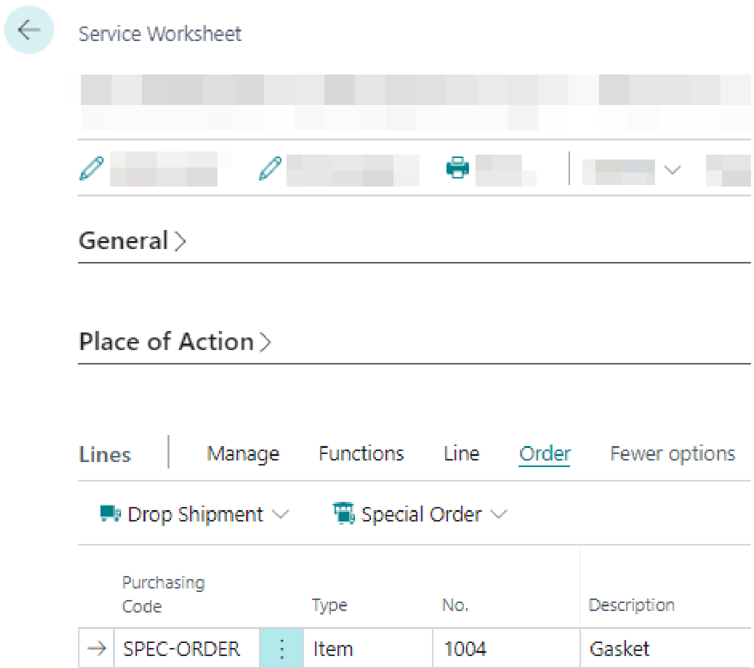
You have created a purchase code. You can use the available purchase codes in the lines of the **Service Item Worksheet** (**Service Worksheet**) to create a purchase order. For more information, see the chapters:

- Create Special Order for Item in Service Item Worksheet
- Create Drop Shipment for Item in Service Item Worksheet

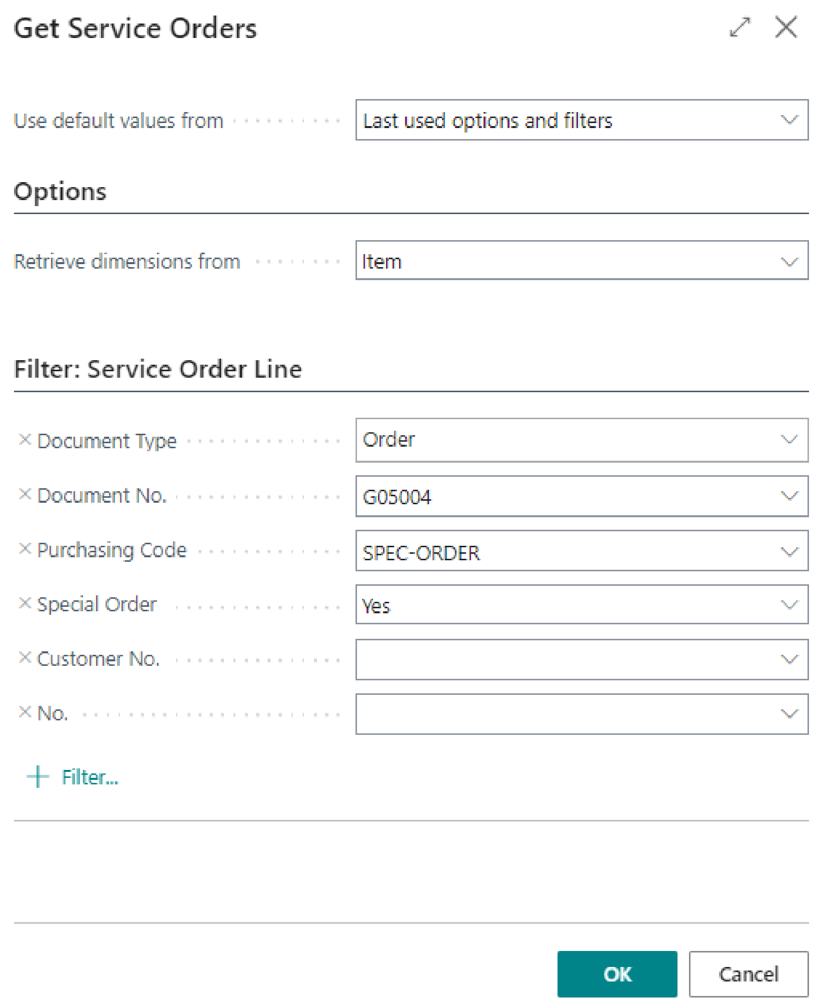
Create Special Order for Item in Service Item Worksheet

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:

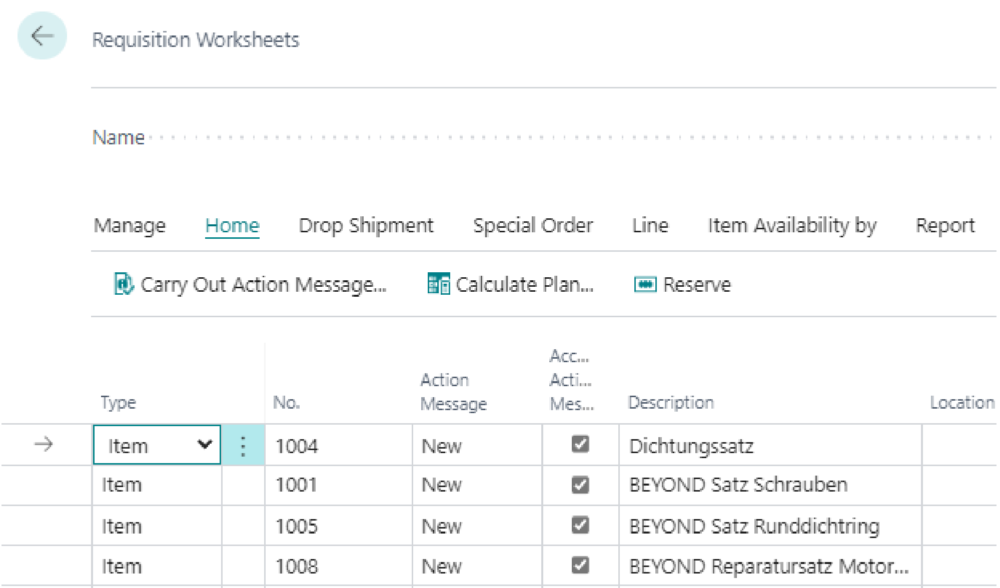
1. Open the search function from the role center (**ALT+Q**).
2. Search for **Service Orders** and click on the corresponding search result.
3. The **Service Orders** list is displayed.
4. Open the Service Order Card.
5. Under the **Lines** tab, open the **Service Item Worksheet** (**Service Worksheet**) 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.



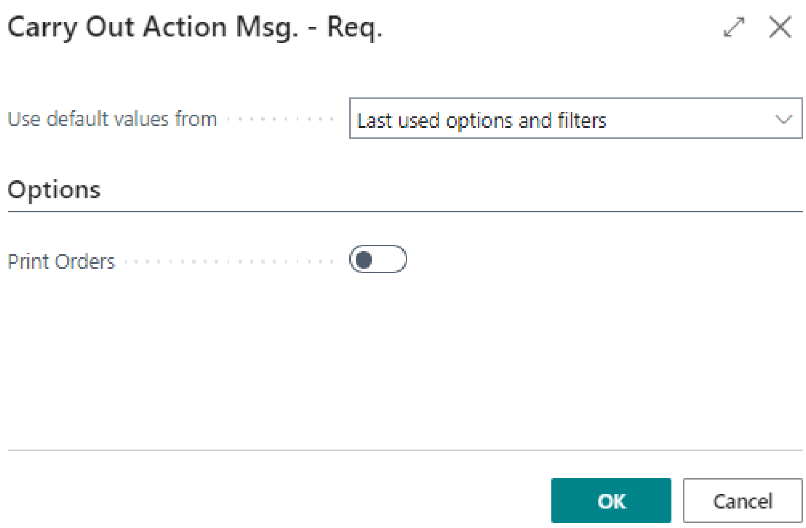
7. Select the lines for which you want to create a special order.
8. Click the **Order** > **Special Order** > **Create Req. Worksheet** option in the menu.
9. The **Get Service Orders** window is displayed.



10. To transfer the service lines to the **Requisition Worksheets** page, click **OK**.
11. Die Seite **Bestellarbeitsblätter** wird angezeigt.

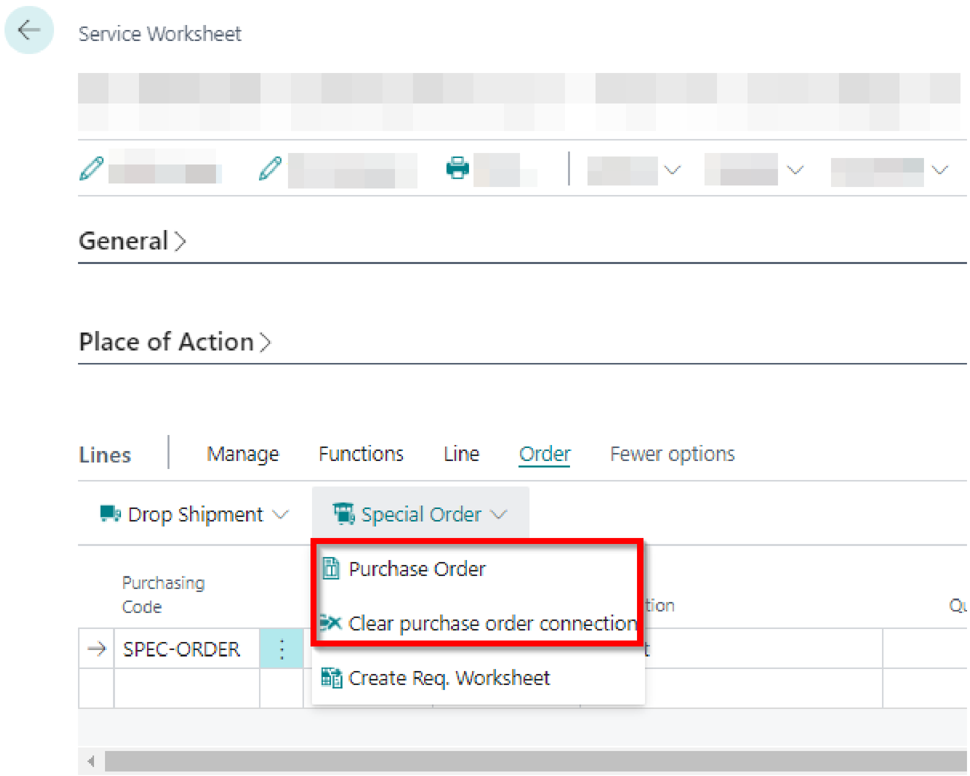


12. To create a purchase order, click **Home** > **Carry Out Action Message**.
13. The **Carry Out Action Msg. - Req.** dialog box is displayed.

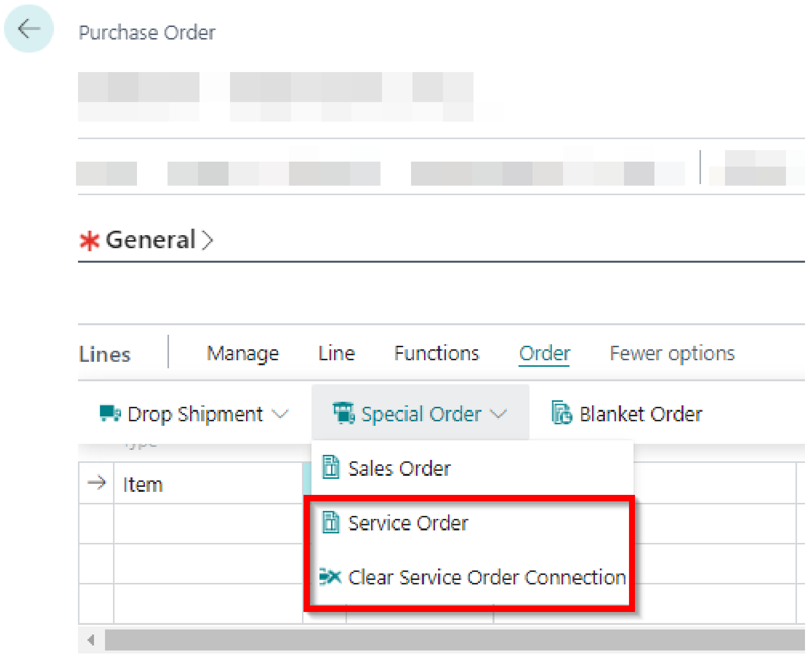


14. Click **OK**.
15. The purchase orders are created.

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**).

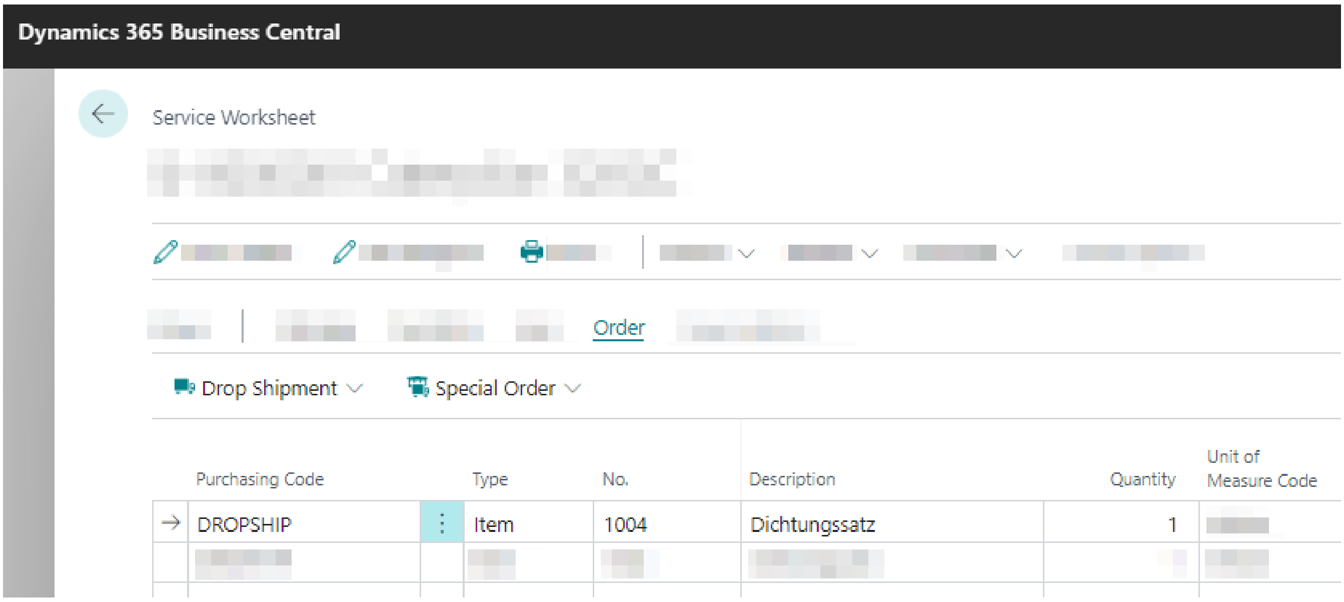


The corresponding option to navigate back to the service order is also available in the Purchase Order card.

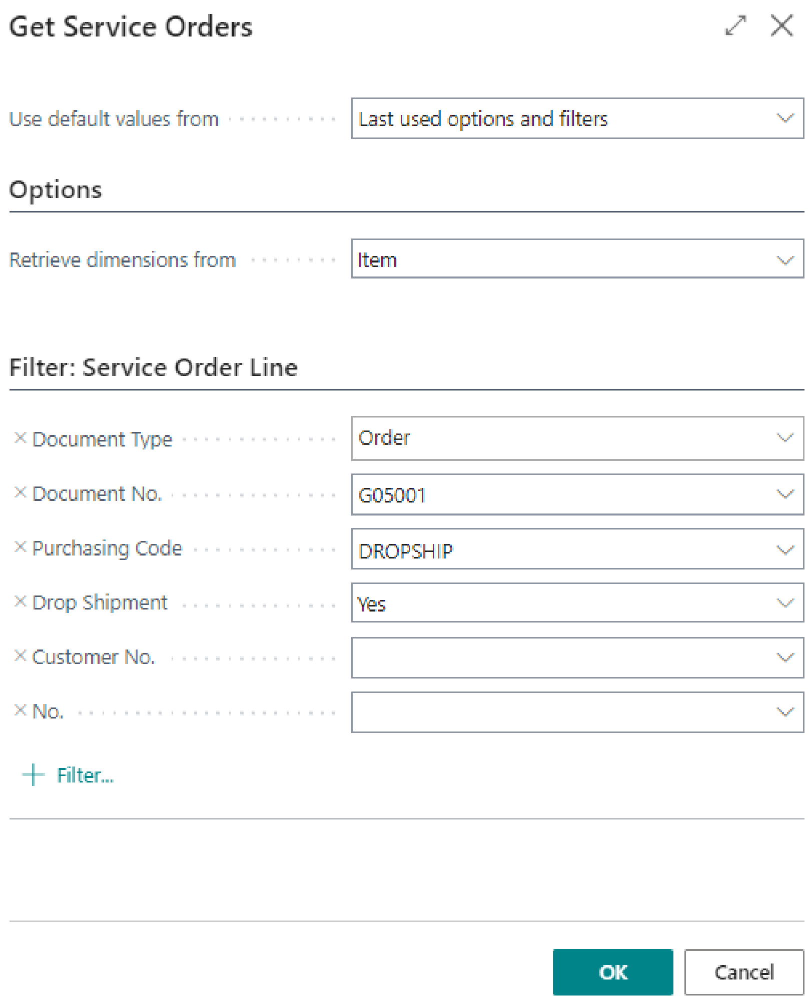

Purchase Order
General
Lines
Manage
Line
Functions
Order
Fewer options
Drop Shipment
Special Order
Blanket Order
Sales Order
Service Order
Clear Service Order Connection
Item

Create Drop Shipment for Service Item

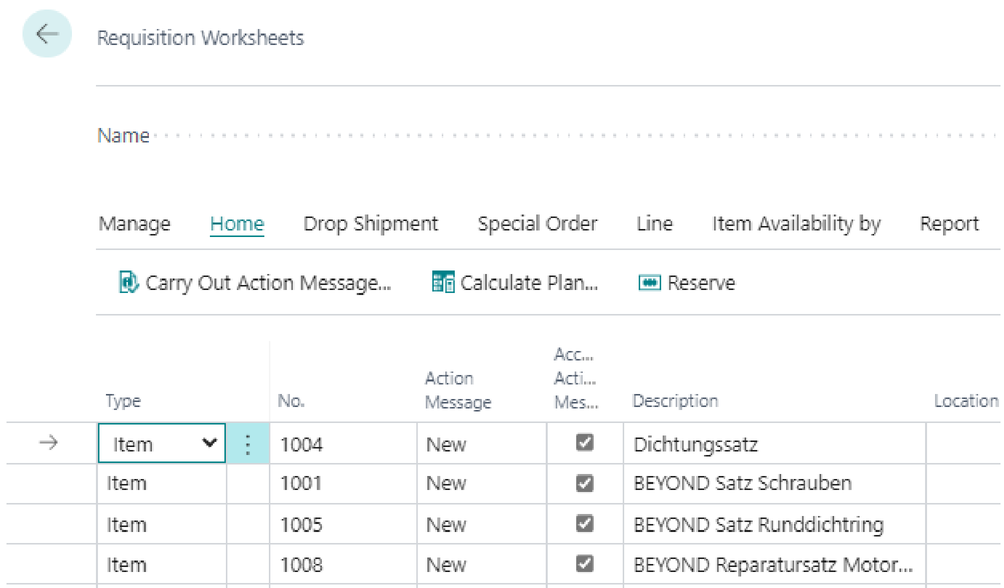
This chapter describes how to create a drop shipment for items in the service item worksheet.
To create a drop shipment for items in the service item worksheet, do the following:

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.


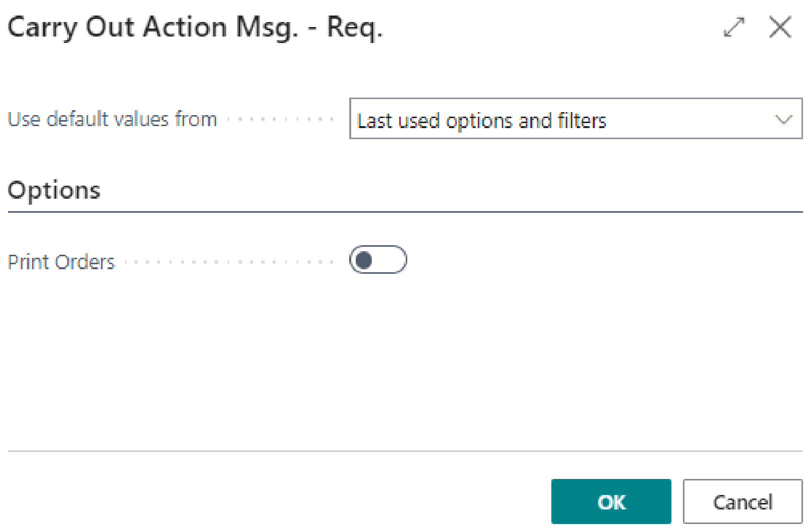
7. Select the lines for which you want to create a direct delivery.
8. Click the **Order** > **Drop Shipment** > **Create Req. Worksheet** option in the menu.
9. The **Get Service Orders** window is displayed.



10. To transfer the service lines to the **Requisition Worksheets** page, click **OK**.
11. The **Requisition Worksheets** page is displayed.

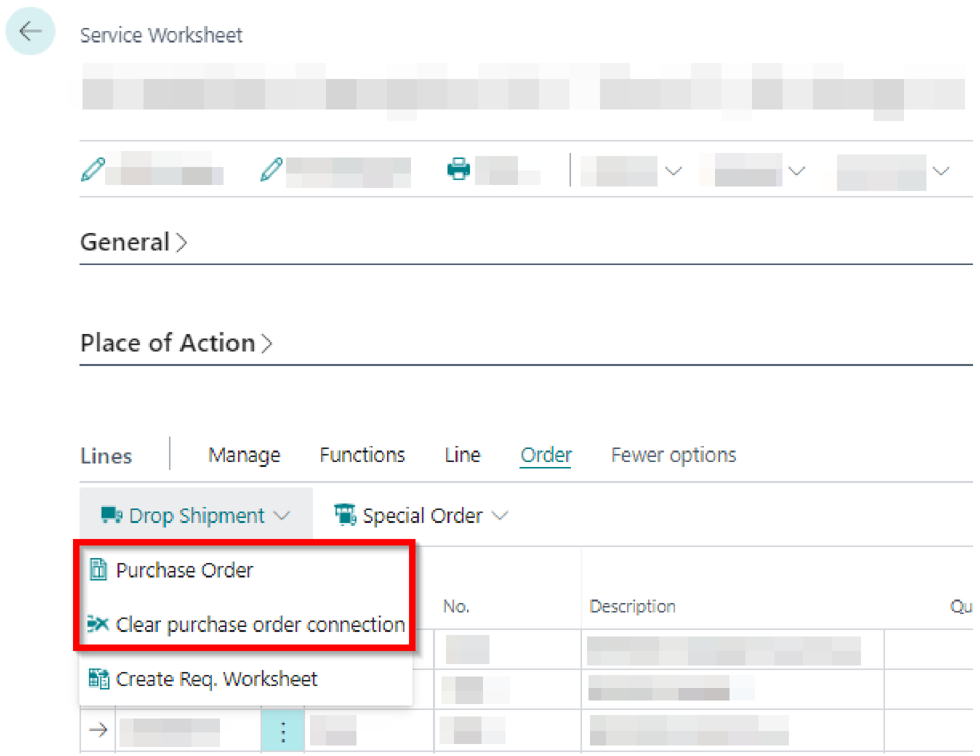


12. To create a purchase order, click **Home** > **Carry Out Action Message….**
13. The **Carry Out Action Msg. - Req.** is displayed.

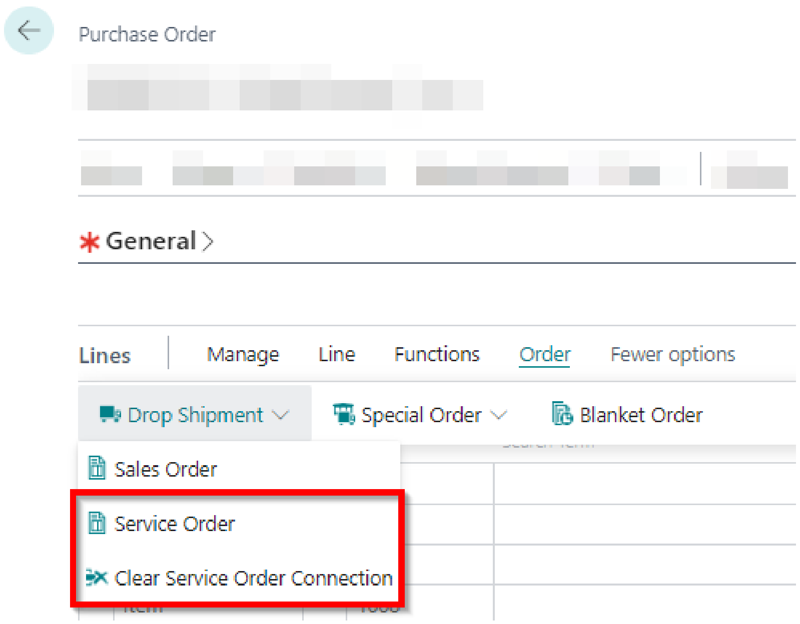


14. Click **OK**.
15. The purchase orders are created.

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**).



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