BEYOND

SERVICE

User Guide

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Preface

This documentation contains information on how to install and operate **Beyond Service** 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 Service**.

Read this documentation in full to set up **Beyond Service** 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 Service** and keep the documentation in a place that is accessible to your employees.

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Manufacturer

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Version history

Version	Date	Autor	Comment
1.0	20.04.2023	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 Service is an extension for Microsoft Dynamics 365 Business Central.

Beyond Service adds new functions to your service area in Business Central as well as already proven functions from other areas to make it easier for you to work quickly:

- Copy service documents
- Create service documents from service item card
- Send quote copies by e-mail & save as PDF file
- Create texts in editor and templates for fault, resolution and internal texts
- Add images to service items
- ...

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

The examples described in this documentation represent only a part of the possibilities that the **Beyond Service** solution offers you.
If you have a specific case that you would like to map via the solution, please feel free to contact us.

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

License Management

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

To view the status of the product license for **Beyond Service**, 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 Service** extension. The permission sets provided are:

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

To assign the permission set for **BEYOND Service** 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 **BeyondService** as filter criteria.
8. The list is filtered to the permission sets of **BeyondService**.
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 Service** 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.

Copy Service Document

This chapter describes how to copy a service document.

You can copy the following documents: Service Quotes, Service Orders, Service Invoices, Service Credit Memos, Posted Shipments, Posted Invoices, and Posted Credit Memos.

The function of the button is explained with an example of a service offer.

1. Open the corresponding list with the service document type you want to copy.
2. Create a new service document, click **New** in the menu bar.
3. Click in the **Description** field to have the system assign a number to the document.
4. In the menu bar, click **Home** > **Copy Document...**.

5. The **Copy Service Document** dialog is displayed.

6. In the **Document Type** selection box, select the type of document.
7. Enter the number of the document under the **Document No.** field. To search existing service documents, click the ellipsis (...) in the **Document No.** field.
8. From the displayed overview, select the service document you want to copy.
9. Click **OK**.
10. The information in the **Customer No.** and **Customer Name** fields are added by the system.
11. Using the **Include Header** slider, you can specify that information from the document header of the document to be copied is transferred to the document copy.
12. You can use the **Recalculate Lines** slider to set whether lines should be recalculated.
13. You can use the **Include Comments** slider to specify that comments contained in the document to be copied, such as fault, resolution and internal texts, are transferred to the document copy. For more information on these texts, see the chapter Add text to service document.

14. Using the **Check if items are available** slider, you can set whether to check that items are available that are included in the document to be copied when you create the document copy.
15. To create the document copy, click **OK**.

The document is copied.

Create Service Document from the Service Item List

Beyond Service allows you to create service documents (service quotes or service orders) from the service item list or also on the service item card. This is used for quick entry of documents.

1. To create a service quote or service order with the selected service item, click the corresponding option on the service item in the menu bar.
2. The **Edit - Create Service Document Setup** window is displayed.

3. In the **Service Order Type** field, specify a service order type.
4. In the **Service Specification Code** field, specify a service specification. Service specifications are another feature of Beyond Service that make it easier for you to quickly enter documents. For more information about service specifications, see the Create Service Specifications chapter.
5. Enter a customer number in the **Customer No.** field.
6. In the **Bill-to Customer No.** field, specify the invoice recipient for the document to be created.
7. To create the service document, click **OK**.

The service document is created.

Create Service Specification

Service specifications in Beyond Service allow you to pre-populate additional information to service order types. This chapter describes how to create a service specification and assign it to a service order type.

To create a service specification and assign it to a service order type, proceed as follows:

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

4. To create a new service specification, click **New** in the menu bar.
5. Enter a code for the service specification under the **Code** column.
6. Enter a description for the service specification under the **Description** column.
7. Under the **Customer No.** column, specify the customer number of the customer for whom you want to create the service specification. The information under the **Customer Name** column is automatically completed by the system if you have specified a number in the **Customer No.** field.
8. Specify the invoice recipient under the **Bill-To Customer No.** column. Beyond Service allows you to define a different invoice recipient for service documents (for example, for shared machines). The information under the **Bill-to Customer Name** column is automatically completed by the system if you have specified a number in the **Bill-To Customer No.** field.
9. In the **Work Type Code** column, specify a work type code.
10. You can use the **Warranty** checkbox to define whether the service specification is related to warranty.
11. You have created a service specification. You can assign this service specification in the service order types.

The service specification can also be used when creating a service document from the service item card. For more information on how to create a service document (service quote or service order) from the service item card, see the Create Service Document from Service Item List chapter.

Save a Service Document as PDF File

This chapter describes how to save a service document as a PDF file.

Beyond Service adds the **Attachments** area to your service quote list and service order list, as well as the associated service cards (service quote and service order) in the factbox. This area will store the PDF files that can be generated using the description below.

To create a PDF file of a document, proceed as follows:

1. Open the service document card.
2. In the menu bar, click **Print/Send** > **Attach as PDF...**.
3. The service document is saved as a PDF file.

If the factbox area is not yet displayed, use the **ALT+F3** keyboard shortcut to display the factbox. The PDF file is saved in the factbox area under the **Attachments** tab. The number after the **Documents** information shows the number of saved PDF files. If you use the **Attach as PDF...** function several times, a new PDF file will be created each time. Click the number to display the **Edit - Attached Documents** window. In this window, you can download PDF files, delete unnecessary PDF files, and view additional information such as the user and timestamp for the files.

If you want to send the PDF file as an attachment in an e-mail, proceed as described in the Send Service Document by E-mail chapter.

Send Service Document by E-mail

This chapter describes how to send service documents by e-mail. BEYOND Service allows you to send service documents as a PDF file in an e-mail.

- Send Service Quote via E-mail
- Send Service Order Confirmation via E-mail

Send Service Quote via E-mail

To send a service quote as a PDF file in an e-mail, proceed as follows:

1. Click **Print/Send** from the menu bar on the Service Quote card.
2. From the menu, select the **Send by Email** option.

The service quote is attached to the e-mail as a PDF file.

Send Service Order Confirmation via E-mail

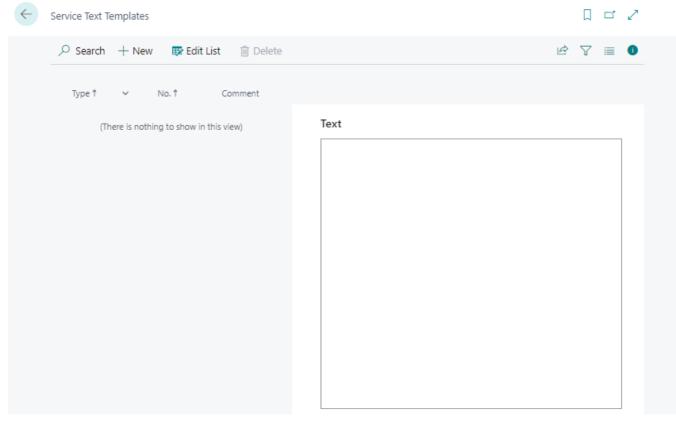To send a service order confirmation as a PDF file in an e-mail, do the following:

1. Click **Print/Send** from the menu bar on the Service Order card.
2. From the menu, select the **Send Order Confirmation by Email** option.

The service order confirmation is attached to the email as a PDF file.

Create Service Text Templates

This chapter describes how to create text templates for the different text types.

1. In the role center, open the search (**ALT+Q**).
2. Search for the **Service Text Templates** list and click on the corresponding search result.
3. The **Service Text Templates** page is displayed.

4. To create a new service text template, click **New** in the menu bar.
5. In the **Type** column, specify the text template type.

6. In the **Number** column, specify the sort order in which you want the text template(s) to be displayed later.
7. Enter a name for the service text template in the **Comment** column.
8. Show the text editor (factbox: **ALT+F2**).

Service Text Templates ✓ Saved

Search | + New | Edit List | Delete

No. ↑	Comment
1	Engine oil loss – General
2	Engine oil loss – Valve cover g...
3	Engine oil loss – Cylinder head...
4	Engine oil loss – Oil pan gasket

Text

A loss of engine oil was detected. Exact cause is unclear.

9. Enter the text for the template.

You have created a service text template. You can use the template in service documents. For more information, see the chapter Add Text to Service Document.

Add Text to Service Document

This chapter describes how to add a text to a service document.
This text can be taken from service text templates or written individually for the service document.

For more information on service text templates, see the Create service text template chapter.

BEYOND Service extends the factbox with three text types:

- Add Fault Text to Service Document
- Add Resolution Text to Service Document
- Add Internal Text to Service Document

Note that the texts in posted documents can no longer be changed.

Add Fault Text to Service Document

This section describes how to add a fault text to a service document. You can specify the fault text on the service document or in the service item worksheet.
To do this, proceed as follows:

1. Open the service document or the service item worksheet from the document.
2. Show the info box area (**ALT+F2**).
3. If you want to use an already defined text, click the **Text Module** option and select a fault description from the displayed service text templates.

4. You can manually adjust the text in the **Fault** text box.

You have entered a fault text.

Add Resolution Text to Service Document

This section describes how to add a resolution text to a service document. You can specify the resolution text on the service document or in the service item worksheet.
To do this, proceed as follows:

1. Öffnen Sie den Servicebeleg oder den Arbeitsschein aus dem Beleg.
2. Show the info box area (**ALT+F2**).
3. If you want to use an already defined text, click the **Text Module** option and select a resolution description from the displayed service text templates. If you want to copy the problem text to the resolution text field, click the **Copy** option.

Fault

Copy   ■ Text Module

A loss of oil (engine oil) was detected.
Check for oil loss on the common seals has been performed:

-> Valve cover gasket (visual inspection)
-> Cylinder head gasket (visual inspection outside)
-> Oil pan gasket (visual inspection)
-> Seals to oil-bearing attachments (visual inspection)

No oil residues visible, proceeded with:

-> Visual inspection of exhaust gas color

No blue discoloration detected, proceeded with:

-> CO_2 test for exhaust gas in cooling water //
   Cooling water checked for oil

Diagnosis: Possible oil consumption due to defective head
gasket/piston rings

Engine oil and oil filter changed, engine oil level topped up

Customer given engine oil as a reserve, engine is worn out

4. You can manually adjust the text in the **Resolution** text box and specify additional information.

You have entered a resolution text.

Add Internal Text to Service Document

This section describes how to add an internal text to a service document. You cannot use text templates for internal texts. However, you can manually copy and paste texts from other text fields. You can specify the internal text on the service document or in the work ticket.

To do this, proceed as follows:

1. Open the service document or the service item worksheet from the document.
2. Show the info box area (**ALT+F2**).
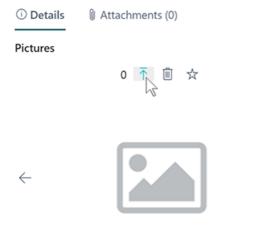3. Enter the text in the **Internal** text box.

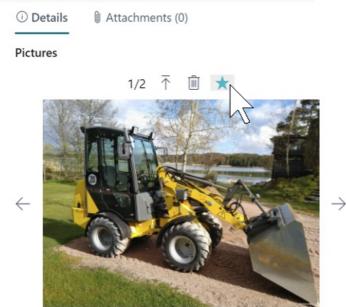You have entered an internal text.

Add Image to Service Item

This chapter describes how to upload an image for a service item.
To upload an image for a service item, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Service Items** and click on the appropriate search result.
3. The **Service Items** list is displayed. In this list you will find all service items.
4. Show the factbox (**ALT+F2**).
5. Move the cursor to the **Pictures** area.

6. Click the arrow icon to upload one or more pictures for the service item.
7. Specify the path to the pictures and upload them.

8. Click the star icon to save a picture as a favorite.

You have uploaded a picture for a service item. If you have uploaded several pictures, you can switch between the displayed pictures using the arrow buttons at the edge of the **Pictures** factbox area. You can use the trash icon to delete pictures, if necessary. Click **Pictures** in the menu bar to display an overview of all pictures of the selected service item. The favorite picture is automatically displayed as the main pictures for the service item.

Force specification of external document numbers

BEYOND Service allows you to force the specification of external document numbers on service documents (service quote and service order).
The above mentioned service documents can be created after activating the option only if an external document number is specified on the card.

To force the specification of an external document number for service documents, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Service Management Setup** and click on the appropriate search result.
3. The **Service Management Setup** page is displayed. On this page you will find the settings for your service area.
4. To force the user to enter an external document number for service documents, activate the **Ext. Doc. No. Mandatory** slider under the **Mandatory Fields** tab.

The mandatory field **External Document No.** is displayed on the service document cards. No service document can be created without specifying an external document number.

Set Location as Service Vehicle

This chapter describes how to set a location as a service vehicle.

To set a location as a service vehicle, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Locations** and click on the corresponding search result.
3. The **Locations** list is displayed. In this list you will find all storage locations.
4. Open the Location card and activate the **Service Vehicle** slider under the **General** tab.

You have set up the location as a service vehicle.

Assign Default Bin for Service and Sales

This chapter describes how to define a default bin for new items in sales and service. For example, if you use an item that has never been used but is to be sold in the course of a service or sales order, you can set a default bin for this item.

To define a default bin for sales and service, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Locations** and click on the corresponding search result.
3. The **Locations** list is displayed.
4. Open the location card, for the location where you want to set a default bin for new items.
5. Scrol down to the **Bins** tab.

6. In the **Sales: Default Bin Code** field, specify a name for a bin to be created when a new item is used in a sales order.
7. In the **Service: Default Bin Code** field, specify a name for a bin to be created when a new item is used in a service order.

As soon as a new item is used in a sales or service order, this bin is automatically created in the set warehouse.

View Part and Ressource Cost

Beyond Service extends the service lines in service quotes and service orders with the columns **Shipped Not Invoiced** and **Completely Shipped** as well as **Amount**, **Amount Including VAT**, **Amount (Parts)** and **Amount (Res.)**. Using the information in the columns, you can see, for example, the exact breakdown of the service line into parts costs and labor costs.

The **Amount (Parts)** column indicates the sum of all amounts for item lines in the service item worksheet.

The **Amount (Resources)** column indicates the sum of all amounts for resource lines in the service item worksheet.

Undo Shipments from Service Lines

This chapter describes how you can undo shipmeents via the service lines. **Beyond Service** adds two new columns to the **Service Lines** page, in which you can read the status of item lines with regard to shipment and invoicing using icons.

Beyond Service offers you the option of undoing shipments directly in the service lines - without having to open the corresponding shipments and carry out the undo process there. The following description explains the symbols in the new **Shipped** and **Invoiced** columns in the service lines using an example for undoing item lines.

To undo one or more item lines via the **Service Lines** page, 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. From the list, select the service order for which you want to undo one or more item lines.
5. The service order is displayed.
6. Under the **Lines** section, select **Order** > **Service Lines**.

7. The **Service Lines** page is displayed.

Service Lines – SVO000001 · Adatum Corporation · Deutz Traktor 5090.4 D GS

Service Lines Filter ·············· Per Selected Service Item Line ▾

Manage · Home · Order · Line | Actions ▾ · Related ▾ · Fewer options

📋 Post | ▾   🔌 Reserve   📑 Select items...   📦 Selected Undo Shipment

Service Item No.	Type	No.	Shipped	Invoiced	Description	L
SV000001	Item	1006	🚜 ✅	$ ✅	Bosal Exhaust System	
SV000001	Item	1007	📦		Bosch Spark Plug	
SV000001	Item	1008	🚜 ✅	$ ✅	Bosch Air Filter	
SV000001	Item	1009	📦		Brembo Break Pad	
SV000001	Item	1010	📦		Continental Tyre	
→ SV000001 ⋮	Item	1011	🚜 ✅ 💬	🔳	Febi Bilstein Break Disc	
SV000001	Item	1012	📦		Magneti Marelli Oil Filter	
SV000001	Item	1013	📦		Lucas Ignition Coil	
SV000001	Item	1015	📦		Valeo Alternator	

Close

8. **Beyond Service** adds two new columns to the service lines:
   - **Shipped**: In this column you will find the status of the item line in relation to the delivery.
     ⬚: Nothing has been shipped yet.
     ⬚: There are shipments.
     ⬚: Everything was shipped.
     ⬚: Cancellation (undoing a shipment) is possible.
   - **Invoiced**: In this column you will find the status of the item line in relation to invoicing.
     ⬚: There are deliveries that have not yet been invoiced.
     ⬚: There is invoicing.
     ⬚: Everything was invoiced.

9. To cancel an item line, select the corresponding line. Please note that you can only cancel item lines that have the ⬚ symbol.

10. Click on **Selected Undo Shipment** in the menu bar.

❓ Undo Shipment for all 1 selected lines?

Yes   No

11. Click **Yes** to cancel the item line.

You have canceled one or more item lines via the service lines.