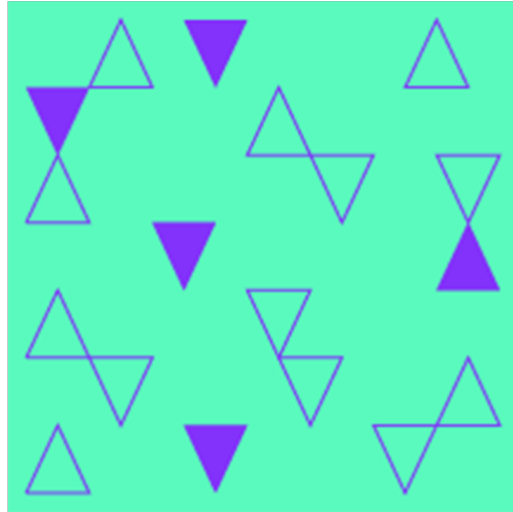
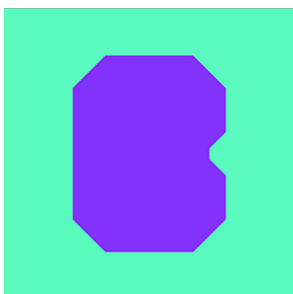




BEYOND

Advanced Serial No



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Preface

This documentation contains information on how to install and operate **Beyond Advanced Serial No** 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 Advanced Serial No.

Read this documentation in full to set up **Beyond Advanced Serial No** 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 Advanced Serial No** and keep the documentation in a place that is accessible to your employees.

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Manufacturer

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VISIT
APPSOURCE

Version history

Version	Date	Author	Comment
1.0	15.08.2023	Jannic Weidel	Initial version of the documentation
1.1	13.05.2025	Jannic Weidel	Added new contents and reworked documentation
1.2	25.09.2025	Jannic Weidel	Added new feature chapters
2.0	06.11.2025	Jannic Weidel	Update & changed product name
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 Advanced Serial No is an extension for Microsoft Dynamics 365 Business Central.

Beyond Advanced Serial No allows for the **direct capture of serial numbers** in documents, optimizing your purchase and sales processes.

The app adds the column Serial Number to your **purchase and sales documents**, providing a seamless way to input the item's serial number.

Simply enter a quantity of 1 for the item and input the serial number in the document lines.

The **item tracking lines are automatically generated**.

The latest version of this documentation can be found at the following link: [Beyond Advanced Serial No Documentation](#).

NOTE

No dependencies on or to other apps

No dependent applications are required to use **Beyond Advanced Serial No**, i.e. you do not need to install any additional applications.

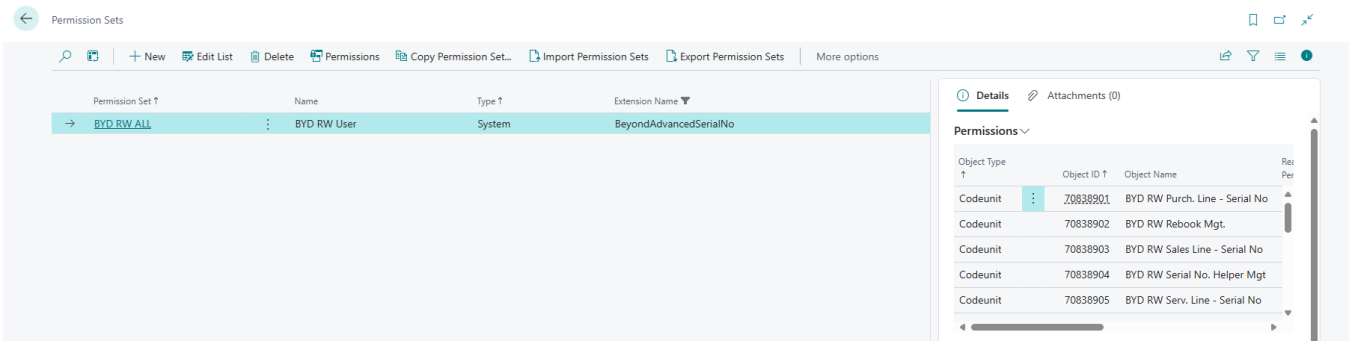
Assign User Permissions

The following description shows how to assign user permissions for the **Beyond Advanced Serial No** extension. The permission sets provided are:

Permission Set	Description
BYD RW ALL	This permission set enables the use of the Beyond Advanced Serial No extension.

To assign the permission set for **Beyond Advanced Serial No** 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 **Beyond Advanced Serial No** as filter criteria.
8. The list is filtered to the permission sets of **Beyond Advanced Serial No**.
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 Advanced Serial No** 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.

Set Up Simplified Serial Number Tracking

This chapter describes the configuration options available to simplify the entry of serial numbers with **Beyond Advanced Serial No.**

Beyond Advanced Serial No adds the **Serial Number** column to the **Lines** section for the following documents:

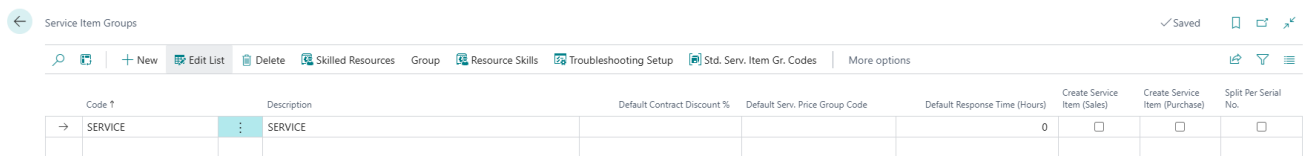
Purchase	Sales	Service	Warehouse
Purchase Order	Sales Order	Service Item Worksheet	Transfer Order
Purchase Invoice	Sales Invoice	Service Invoice	-
Purchase Credit Memo	Sales Credit Memo	Service Credit Memo	-
Purchase Quote	Sales Quote	-	-
Purchase Return Order	Sales Return Order	-	-

In the **Serial Number** column, you can enter the serial number of an item directly without leaving the document card view. If you enter a larger quantity of items (greater than 1) in the document line, individual lines are created for the quantity of items entered, allowing you to enter a line with a unique serial number for each item.

The behavior of the software described above is controlled by the service item group on the item card.

To create a new service item group in which individual lines are generated for items requiring serial numbers according to the item quantity, proceed as follows:

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



The screenshot shows the 'Service Item Groups' list in the software interface. The list has columns for Code #, Description, Default Contract Discount %, Default Serv. Price Group Code, Default Response Time (Hours), Create Service Item (Sales), Create Service Item (Purchase), and Split Per Serial No. The first row shows a group with Code # 'SERVICE' and Description 'SERVICE'. The 'Create Service Item (Sales)' checkbox is checked, and the 'Split Per Serial No.' checkbox is also checked. The 'Default Response Time (Hours)' is set to 0.

Code #	Description	Default Contract Discount %	Default Serv. Price Group Code	Default Response Time (Hours)	Create Service Item (Sales)	Create Service Item (Purchase)	Split Per Serial No.
→ SERVICE	SERVICE			0	☒	☐	☒

4. **Beyond Advanced Serial No** adds the following three columns to the **Service Item Groups** list:
 - **Create Service Item (Sales):** Select the checkbox for the service item group to create a service item when an item from this service item group is sold. The serial number is copied from the sales document and automatically entered into the service item record. For more information about this feature, see the chapter [Configure Automatic Creation of Service Items](#).
 - **Create Service Item (Purchase):** Select the checkbox for the service item group to create a service item when an item from this service item group is purchased. The serial number is copied from the purchase document and automatically entered into the data record for the service item. For more information about this feature, see the chapter [Configure Automatic Creation of Service Items](#).
 - **Split per Serial Number:** Select this checkbox to create individual lines for entering serial numbers for an item quantity (greater than 1) in this service item group.
5. Create a new service item group or select the checkboxes for the option **Split per Serial Number**.

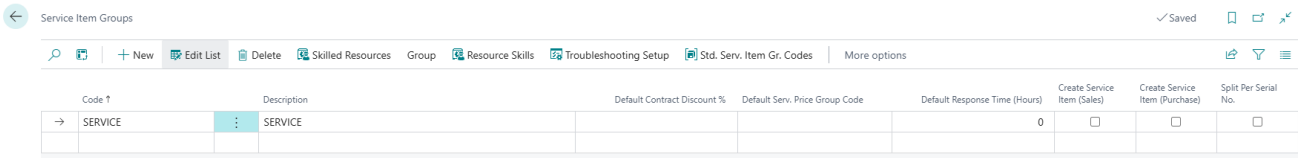
You have created a service item group for simplified serial number entry or added this functionality to an existing service item group. For more information on how to enter serial numbers for items, see the chapter [Add Serial Numbers to Items](#).

Configure Automatic Creation of Service Items

This chapter describes how to configure **Beyond Advanced Serial No** so that service items are automatically created for items belonging to a specific service item group when they are used in purchase or sales documents.

To set up the creation of a service item when a specific item is purchased or sold, proceed as follows:

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



Service Item Groups							
Code	Description	Default Contract Discount %	Default Serv. Price Group Code	Default Response Time (Hours)	Create Service Item (Sales)	Create Service Item (Purchase)	Split Per Serial No.
→ SERVICE	SERVICE			0	☐	☐	☐

4. **Beyond Advanced Serial No** adds the following three columns to the **Service Item Groups** list:
 - **Create Service Item (Sales):** Select the check box for the service item group to create a service item when an item from this service item group is sold. The serial number is copied from the sales document and automatically entered in the service item record.
 - **Create Service Item (Purchase):** Select the check box for the service item group to create a service item when an item from this service item group is purchased. The serial number is copied from the purchase document and automatically entered into the record for the service item.
 - **Split per Serial No.:** Select the checkbox to create individual lines for entering serial numbers for items which have an item quantity greater than 1. For more information about this feature, see the chapter [Set Up Simplified Serial Number Tracking](#).

You have configured the automatic creation of service items for the selected service item group.

Configure Service Setup for Rebook Wizard

This chapter describes how to configure the necessary settings in the service setup so that you can rebook service items to fixed assets using the rebook wizard.

To make the necessary settings, proceed as follows:

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

[illegible]

4. Scroll down the **Service Management Setup** page until you reach the **Rebook from Service Items to Fixed Asset** tab.
5. Enter the relevant information in the fields:
6. **Item Journal Template Name:** Enter the name of the item journal template in this field.
 - **Item Journal Batch Name:** Enter the name of the item journal batch in this field.
 - **Fixed Asset Journal Template Name:** Enter the name of the fixed asset journal template in this field.
 - **Fixed Assets Batch Name:** Enter the name of the fixed asset batch in this field.
 - **Gen. Journal Template Name:** Enter the name of the general journal template in this field.
 - **Gen. Journal Batch Name:** Enter the name of the general journal batch in this field.
 - **Balance Account No.:** Enter the balance account number in this field.
 - **Gen. Bus. Posting Group:** Enter the general business posting group in this field.
 - **Gen. Prod. Posting Group:** Enter the general product posting group in this field.
 - **VAT Bus. Posting Group:** Enter the VAT business posting group in this field.
 - **VAT Prod. Posting Group:** Enter the VAT product posting group in this field.

You have entered the information required to rebook service items to fixed assets using the rebook wizard. For more information, see the chapter [Rebook Service Items to Fixed Assets](#).

Add Serial Numbers to Items

This chapter describes how you can add serial numbers for items using **Beyond Advanced Serial No.** **Beyond Advanced Serial No** adds the **Serial Number** column to the line area in sales and purchase documents. You can enter the serial number in this column. The function is explained below using a sales order as an example.

NOTE

Setup required

Basic setup is required for the function shown. The chapter [Set Up Simplified Serial Number Tracking](#) describes in detail how to set up simplified serial number tracking. If you have any questions about this feature, please feel free to contact us. You will find the relevant contact details in the chapter [Preface](#).

To add serial numbers to items using simplified serial number tracking, proceed as follows:

1. Open the document in which you want to add a serial number to an item. In our example, we are using a sales order.
2. Scroll to the **Lines** tab and select the item to which you want to add a serial number.

←

Sales Order

✎

🔗

+

🗑

✓ Saved

🔄

🔗

101010 · Adatum Corporation

Home

Prepare

Print/Send

Request Approval

Order

More options

📄 Post...

📄 Release

📄 Create Warehouse Shipment

📄 Create Inventory Put-away/Pick...

📄 Archive Document

General

Customer Name

Adatum Corporation

Order Date

04.06.2025

Contact

Jakob Otto

Due Date

18.06.2025

Document Date

04.06.2025

Requested Delivery Date

Posting Date

04.06.2025

External Document No.

VAT Date

04.06.2025

Status

Open

Lines

Manage

Line

Order

🔗 New Line

✂ Delete Line

🔍 Select items...

Type	No.	Description	Quantity	Serial No.	Qty. to Assemble to Order	Reserved Quantity
→ Item	1000	WAVLINK Docking Station	3	*		-

3. Enter the value **3** in the **Quantity** column, for example. If the corresponding service item group with the **Split per Serial No.** option is activated for this item, one line is created for each item quantity specified.



101010 · Adatum Corporation

[Home](#) [Prepare](#) [Print/Send](#) [Request Approval](#) [Order](#) | [More options](#)[Post...](#) | [Release](#) | [Create Warehouse Shipment](#) | [Create Inventory Put-away/Pick...](#) | [Archive Document](#)

General

[Show more](#)

Customer Name	Adatum Corporation	Order Date	04.06.2025
Contact	Jakob Otto	Due Date	18.06.2025
Document Date	04.06.2025	Requested Delivery Date	
Posting Date	04.06.2025	External Document No.	
VAT Date	04.06.2025	Status	Open

[Lines](#) | [Manage](#) [Line](#) [Order](#)[New Line](#) | [Delete Line](#) | [Select items...](#)

Type	No.	Description	Quantity	Serial No.	Qty. to Assemble to Order	Reserved Quantity
→ Item	1000	WAVLINK Docking Station	1	* ...		—
Item	1000	WAVLINK Docking Station	1	*		—
Item	1000	WAVLINK Docking Station	1	*		—

4. Enter a serial number for each line in the **Serial Number** column. Please note that the item tracking code for the item must be specified on the item card under the **Item Tracking** tab.

You have specified serial numbers for the items. If a service item group is selected for the item in which service items are to be created after purchase or sale, service items are created according to the specified item quantity. The service items have the serial number specified in the line under the **Serial No.** column. For more information, see the chapter [Configuring Automatic Creation of Service Items](#).

Rebook Service Items to Fixed Assets

This chapter describes how you can rebook a service item to your fixed assets.

NOTE

Setup Required

To rebook a service item to your fixed assets, you need to set up a configuration. A description of how to set up the rebook wizard is provided in the chapter [Configure the Service Setup for the Rebook Wizard](#).

To rebook a service item to fixed assets, proceed as follows:

- 1. Open the search function (**ALT+Q**) from the role center.
- 2. Search for **Service Items** and click on the corresponding search result.
- 3. The **Service Items** list is displayed.
- 4. Click on the service item in the list that you want to rebook to your fixed assets and open the item card.
- 5. The service item card is displayed.
- 6. Click **Item > Rebook to Fixed Asset** in the menu.
- 7. The transfer wizard is displayed.

Rebook To Fixed Asset - SV000004 · WAVLINK Docking Station

No.

SV000004

Description

WAVLINK Docking Station

Unit Cost

100,00

Fixed Asset Template No. *

Depreciation Book Code

Posting Date

04.06.2025

FA Posting Group

OK

Cancel

- 8. In the **Fixed Asset Template No.** field, enter the fixed asset template you want to use for the service item.
- 9. In the **Depreciation Book Code** field, enter the code for the depreciation book.
- 10. In the **Posting Date** field, enter the date for the posting.
- 11. In the **FA Posting Group** field, enter the fixed asset posting group for the rebook posting.
- 12. To rebook the service item to fixed assets, click **OK**.

The service item is transferred to fixed assets.