

User Guide for Microsoft Dynamics 365 Business Central

Product: SD Interface Field Service

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2 Getting Started

SD Interface Field Service is a framework for processing inbound events received from Microsoft Dynamics365 Field Service into Microsoft Dynamics 365 Business Central.

SD Interface Field Service logs and handles Master Data updates from Field Service into Business Central; logs Field Service Alerts/Transactions; and allows users to process these events and master data updates in Business Central.

Master Data Updates from Field Service include:

Field Service Assets to Business Central Fixed Assets

Field Service Customer to Business Central Customer (standard API)

Field Service Item to Business Central Item (standard API)

Field Service Agreement to SD Billing Engine Contract Header (standard API)

Field Service Asset Relationship to SD Billing Engine Contract Lines (standard API)

Field Service Work Order Product to SD Billing Engine Items Codes per SD Billing Engine Contract Line

Field Service Engineers to Business Central Resources (standard API)

Events received from Field Service Events are logged in an inbound event table. Field Service Work Orders write back to the SD Interface Field Service Event table when a Work Order is Completed (asset meter reads and cash collections are logged) and Stock Movements (stock takes, item replenishment, item removal, and changed lines are logged) are recorded in Field Service.





3 Installing SD Interface Field Service

SD Interface Field Service, is available on AppSource. Contact Simply Dynamics Ltd for a subscription licence key to use the App.

The **Allow HttpClient Requests** option is automatically enabled on install of SD Interface Field Service. Switching on the **Allow HttpClient Requests** option for SD Interface Field Service in **Extension Management** allows SD Interface Field Service to call an API that sends and returns licence key information to activate the product licence and to call GitHub to import sample data for the product.

3.1 Security Setup

We have provided the following permission sets for SD Interface Field Service: SDY FS ADMIN *(Figure 3-1).*

rei	mission set Lookup	,	~~	
			sdy fs $ imes$	
	Permission Set ↑		Name	Extension Name
\rightarrow	SDY FS ADMIN	÷	SD Field Service - Admin	SD Interface Field Service

Figure 3-1





3.2 Choosing the SD Interface Field Service Role

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** (*Figure 3-2*).

							ф	Ô	? 🕕
Inventory ~ Posted Documents ~ Setup & Extr	ensions \vee =					Personalise			- 1
Sales Journals Cash Receipt Journals Transfer C	rders					Design			
						My Settings			
	ACTIONS					Company infor	mation		
	+ Sales Quote	+ Sales Order	+ Sales Credit Memo	> Sales	> His	Assisted setup			- 18
	+ Sales Invoice	+ Sales Return Order	> Tasks	> Reports		7 ibbibted betap			

Figure 3-2

2. In the My Settings page, on the Role field, select the AssistEdit icon (Figure 3-3).

Role	Sales Order Processor	
Company	CRONUS International Ltd.	
Nork Date · · · · · · · · · · · · · · · · · · ·	23/10/2023	niù
Region	English (United Kingdom)	
anguage	English (United Kingdom)	
lime Zone	(UTC+00:00) Dublin, Edinburgh, Lisbon, L	
Notifications	Change when I receive notifications.	
Feaching Tips		
	OK Cancel	



3. You should see SD Interface Field Service in the list of Roles (Figure 3-4).

Availab	le Roles $P \sim$	2	×
	Display Name SD Interface EDI		
\rightarrow	SD Interface Field Service	÷	
	Accountant		







- 4. Choose SD Interface Field Service and click OK.
- 5. The **SD Interface Field Service** Role should now be displayed in the **Role** field (*Figure 3-5*).

Role	SD Interface Field Service	
Company	100-00-0m	
Work Date · · · · · · · · · · · · · · · · · · ·	18/12/2023	
Region	English (United Kingdom)	
anguage	English (United Kingdom)	
Time Zone	(UTC+00:00) Dublin, Edinburgh, Lisbon, L	
Notifications	Change when I receive notifications.	
Teaching Tips		

Figure 3-5

3.3 Accessing the SD Interface Field Service Pages

Use the **Tell Me** to search for SD Interface Field Service pages. Begin typing **SD** or **field** to see a list of the SD Interface Field Service pages (*Figure 3-6*).

field serv		
Go to Pages and Tasks		Show all (8)
> SD Interface Field Service Setup	Administration	Д
> SD Interface Field Service Events	Lists	
> SD Interface Field Service API Log	Lists	







3.4 Activating the SD Interface Field Service Licence

To use SD Interface Field Service, you must activate the licence with a subscription licence key from Simply Dynamics Ltd.

1. From the **Tell Me**, search for and select the **SD Interface Field Service Setup** card. When the **SD Interface Field Service Setup** card first opens, you will be prompted that "Your license is invalid." Choose **OK** (*Figure 3-7*).



Figure 3-7

 You will then see the Activate Your Product page. Enter your company name in Company Name and your company email in Email. Paste the supplied product key into the Product Key field. Tab off the Product Key field to validate the contents of the field and to enable the Activate key. Choose Activate (Figure 3-8).

Activate SD Interface Field S	ervice	2° ×
Shop		
Company Name 🛛 🕂 😽		
Email · · · · · · · · · · · · · · · · · · ·		
Product Key		
Valid · · · · · · · · · · · · · · · · · · ·)	
License Type		
Expiry Date		
The Product Key for this product has e be used. Please contact Simply Dynam reactivate your licence.	xpired and the product ca ics for a new Product Key	n no longer to
	Request Subscription	Activate

Figure 3-8

3. The **Activate Your Product** page will update to display a message that the activation was successful. The expiry date will depend on the details of your subscription with Simply Dynamics Ltd. Choose **Finish** to exit the page.





3.5 Setup and Configuration

3.5.1 SD Document Sender Assisted Setup

You can easily import default setup for SD Interface Field Service using the **Assisted Setup** action on the **SD Interface Field Service Setup** card. In the **SD Interface Field Service Role Centre** drill through on the **Setup** cue (*Figure 3-9*).

	d Service Activities - Ev	vents		SD Interface Field	Service Activities - Ev	vents Today	
All Events	Events Pending	Events In Error	Events Processed	All Events Today	Events Pending Today	Events In Error Today	Events Process Today
0	0	0	0	0	0	0	0
	- <u>-</u>	>	→ →	>	→ →	→ →	→ →
Interface Fiel vent History	d Service Activities - H Completed Wo	istory API Log Errors	API Logs	Master Data Event Types	Setup	ה	
12	Orders 10	Week O	0	11	1		
42							

Figure 3-9

1. In the SD Interface Field Service Setup from the **Home** menu, choose the **Assisted Setup** action (*Figure 3-10*).



Figure 3-10

2. Choose Yes to the message (Figure 3-11).









3. You are prompted again, choose **Yes.** The message below will display on successful import of the records (*Figure 3-12*).

(j	11 records successfully imported.		k.
		ОК	L
			8

Figure 3-12





4 Using SD Interface Field Service

4.1 SD Interface Field Service - Setup

The SD Interface Field Service Setup can be accessed from the SD Interface Field Service Role Centre, by selecting the Setup action cue (*Figure 4-1*), or by searching for SD Interface Field Service Setup in the Tell Me.

O Interface Fiel	d Service Activities - Ev	vents		SD Interface Field	Service Activities - Ev	vents Today	
All Events	Events Pending	Events In Error	Events Processed	All Events Today	Events Pending Today	Events In Error Today	Events Process Today
5	5	0	0	5	5	0	0
	-					<u> </u>	
	2	1	1	1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		
	2	2	1				
D Interface Fiel	d Service Activities - Hi	istory	1	Master Data			Ĺ
2 D Interface Fiel Event History	2 d Service Activities - Hi Completed Wo Orders	> API Log Errors Week	2 API Logs	Master Data Event Types	Setup]	
2 D Interface Field Event History 532	d Service Activities - Hi Completed Wo Orders	API Log Errors Week	API Logs	Master Data Event Types	Setup 1		

Figure 4-1

The **SD Interface Field Service Setup** contains the following fields in the **General** FastTab (*Figure 4-2*).

SD Interf	ace Field Servi	ce Setup	
Home About Relat	ted More options		
Roduct Activation	Assisted Setup Manage	Subscriptions	۶
General			
	C Marsha	Delete ABL Loos After 1 Year	



• **Delete History After** – Specify for how long you want to keep records in the Event History table.





• **Delete API Logs After** - Specify for how long you want to keep records in the API Logs table.

The SD Interface Field Service Setup contains the following actions in the **Home** menu group *(Figure 4-3)*.



• Assisted Setup – Choose this action to import records into the Event Types list.

The SD Interface Field Service Setup contains the following actions in the **Related** menu group *(Figure 4-4)*.

S	D Interface Field Service Setup	
н	ome About Related More options	
	Event Types 🖷 Events 🔨 Event History 🔨 API Logs 🎇 Job Queue Entries	5ê



- Event Types Choose this action to open the Event Types list.
- Events –Select this action to open the Events list.
- Event History Choose this action to open the Event History list.
- API Logs Choose this action to open the API Log list.
- Job Queue Entries Select this action to open the SD Interface Field Service Job Queue Entries list.





4.2 SD Interface Field Service – Event Types

The Event Types list defines the Event Type, Event Category, and the Processing Codeunit for each Event Type. Open the **SD Interface Field Service Event Types** list. This list can be opened from the **SD Interface Field Service Setup**, the **SD Interface Field Service Role Centre** or by searching the **Tell Me** (*Figure 4-5*).

S	earch 💽 Analyse -	+ New	🐺 Edit List 📋 Delete				ዸ 7 ≣
	Event Type 1		Description	Event Category	Processing Codeunit Id	Processing Codeunit	Auto Process By API
>	Visit Completed	:	Visit Completed	WOC - Work Order Completed	43015235	SDY FS DUMMY PROCESS	
	Cash Collected		Cash Collected	WOC - Work Order Completed	43015235	SDY FS DUMMY PROCESS	
	Meter Reading		Meter Reading	WOC - Work Order Completed	43015235	SDY FS DUMMY PROCESS	
	Stock Take		Stock Take	STK - Stock Movement	43015235	SDY FS DUMMY PROCESS	~
	Replenish Stock		Replenish Stock	STK - Stock Movement	43015235	SDY FS DUMMY PROCESS	
	Remove Stock		Remove Stock	STK - Stock Movement	43015235	SDY FS DUMMY PROCESS	V
	Install Item		Install Item	STK - Stock Movement	43015235	SDY FS DUMMY PROCESS	
	Customer Update		Customer Update	Master	43015235	SDY FS DUMMY PROCESS	
	Item Update		Item Update	Master	43015235	SDY FS DUMMY PROCESS	
	Vendor Update		Vendor Update	Master	43015235	SDY FS DUMMY PROCESS	
	Contract Update		Contract Update	Master	43015235	SDY FS DUMMY PROCESS	

Figure 4-5

- Event Type Choose the Event Type from a list of pre-defined event types. Options are <blank>, Visit Completed, Cash Collected, Meter Reading, Stock Take, Replenish Stock, Remove Stock, Install Item, Customer Update, Item Update, Vendor Update or Contract Update. These records exist if you chose the Assisted Setup action in the SD Interface Field Service Setup card.
- **Description** Displays the description of the event chosen in **Event Type**.
- Event Category Choose from a pre-defined category of <blank>, WOC Work Order Completed, STK- Stock Movement, or Master.
- **Processing Codeunit ID** To enable an Event Type, choose the Codeunit that you want to call when the Event Type is processed in Business Central.
- **Processing Codeunit** Displays the description of the Codeunit chosen in **Processing Codeunit ID.**
- Auto Process by API Select this checkbox if you want the Event to automatically process in Business Central when the API call is received from Field Service.





4.3 SD Interface Field Service – Events

Open the **SD Interface Field Service Events** list, accessed from the **SD Interface Field Service Setup**, the **SD Interface Field Service Role Centre** or by searching the **Tell Me**.

The Event list displays all unprocessed events issued by Field Service to Business Central *(Figure 4-6).* Unprocessed Events are highlighted in yellow.

, ○ Sea	arch 💽 A	naly	se 🐺 Edit Li	st 🕈 Process	s Pending Events	Seproces:	s Events In Error	✓ Process All Events	🔠 Archive Processed Events	Ê	7 ≣	•
	Entry No.↓		Work Oder Id	Work Order Date	Event Category	Event Type	Asset No.	Asset Description				
\rightarrow	537	÷	WO999999	08/12/2023	WOC - Work	Meter Read	FA000100	Printer 1-111	Error Datail			
	536		WO9999999	08/12/2023	STK - Stock	Stock Take	FA000100	Printer 1-111	Enor Detail			
	535		WO9999999	08/12/2023	STK - Stock	Stock Take	FA000100	Printer 1-111	Error Message			
	534		WO9999999	08/12/2023	STK - Stock	Stock Take	FA000100	Printer 1-111				
	533		WO9999999	08/12/2023	STK - Stock	Stock Take	FA000100	Printer 1-111	Error Call Stack			

Figure 4-6

From the menu, select the appropriate action to process or reprocess the events in the list (*Figure 4-7*).

SD Interface	Field Service Eve	nts							
	Analys	e 🛛 🐺 Edit List	Process	Pending Events	🗳 Reproce	ss Events In Error	✓ Process All Events	Archive Processed Events	🖢 Force Archive Events
,	Entry No.↓	Work Oder Id	Work Order Date	Event Category	Event Type	Asset No.	Asset Description		

Figure 4-7

Events that process successfully are highlighted in green. Events in error are highlighted in red (*Figure 4-8*).

,	ch 💽 A	nalys	e 🐺 Edit Lis	st 🕇 Process	Pending Events	or Reproces	s Events In Error	✓ Process All Events	🔠 Archive Processed Events	ß	7 I
	Entry No.↓		Work Oder Id	Work Order Date	Event Category	Event Type	Asset No.	Asset Description			
	537		W0999999	08/12/2023	WOC - Wor	Meter Rea	FA000100	Printer 1-111	Error Datail		
	536		W0999999	08/12/2023	STK - Stock	Stock Take	FA000100	Printer 1-111	Error Detail		
	535	:	W0999999	08/12/2023	STK - Stock	Stock Take	FA000100	Printer 1-111	Error Message		
	534		WO9999999	08/12/2023	STK - Stock	Stock Take	FA000100	Printer 1-111	-		
\rightarrow	533	- 5	W0999999	08/12/2023	STK - Stock	Stock Take	FA000100	Printer 1-111			

Figure 4-8





4.4 SD Interface Field Service – Events History

Open the **SD Interface Field Service Events** list, accessed from the **SD Interface Field Service Setup**, the **SD Interface Field Service Role Centre** or by searching the **Tell Me**.

The processed events written to Business Central by Field Service are moved from the **SD Interface Field Service Events** list to the **Events History** list when the **Archive Processed Events** action is chosen. Any error details logged against the Event are also displayed here (*Figure 4-9*).

♀ Search ●	Analyse										ê 7 🗉
·											
Entry No.↓	Work Id	Oder	Work Order Date	Event Category	Event Type	Asset No.	Asset Description	Event Key Id	Item No.		
532	WO1	20789	08/12/2023		Stock Take	FA000100	Printer 1-111	1122345	1000		Error Detail
531	WO1	20789	08/12/2023		Replenish Stock	FA000100	Printer 1-111	1122345	1000		
530	WO1	20789	08/12/2023		Replenish Stock	FA000100	Printer 1-111	1122345	1000		Error Message Processing Error - 55
529	W01	20789	08/12/2023		Replenish Stock	FA000100	Printer 1-111	1122345	1000	U	
528	WO1	20789	08/12/2023		Replenish Stock	FA000100	Printer 1-111	1122345	1000		
527	WO1	20789	08/12/2023		Replenish Stock	FA000100	Printer 1-111	1122345	1000		
526	WO1	20789	08/12/2023		Replenish Stock	FA000100	Printer 1-111	1122345	1000		Error Call Stack
525	WO1	20789	08/12/2023		Install Item	FA000100	Printer 1-111	1122345	1000		43015235).OnRun(Trigger) line 3 - SD Interface
524	WO1	20000	08/12/2023		Install Item	FA000100	Printer 1-111	1122345	1000		"SDY F5 Processing Mgt." (CodeUnit
523	WO1	20000	08/12/2023		Stock Take	FA000100	Printer 1-111	1122345	1000		43013225).Processevents title 24 - 5D Interface Field Service by Simply Dynamics 1td
522	WO1	20000	08/12/2023		Stock Take	FA000100	Printer 1-111	1122345	1000		
521	WO1	20000	08/12/2023		Stock Take	FA000100	Printer 1-111	1122345	1000		
<u>520</u>	: wor	23999	08/12/2023		Remove Stock	FA000100	Printer 1-111	1122345	1000		
519	WO1	23999	08/12/2023		Stock Take	FA000100	Printer 1-111	1122345	1000		

Figure 4-9





5 Uninstalling SD Interface Field Service

You can uninstall **SD Interface Field Service** using the Web Client:

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (*Figure 5-1*).

									٩	Q	Ø	?	
Invent	TELL ME WHAT YOU WANT TO DO		2	\times									
ales J	extension			×					2				
	Go to Pages and Tasks												
	> Extension Management	Administration		Ω	H	+ Sales Credit Memo	> Sales	> History					
	Didn't find what you were looking for? Try exploring					10010	, noporto						
204	ł												

Figure 5-1

- 2. In Extension Management, you should see the SD Interface Field Service app installed.
- 3. Select the SD Interface Field Service app and choose the Uninstall Action (Figure 5-2).

Search Manage M	ore options						
Extension Marketplace	Upload Extension	🕌 Installation Status	⊙ View	^{}∰} Install	🔀 Uninstall	🖹 Unpublish	🎝 Set up

Figure 5-2



IT Simply Makes Business Sense with Microsoft Dynamics 365



Simply Dynamics has been delivering complex and custom Dynamics 365 Projects and Support since 2007. Now servicing clients in over 18 countries.



DynamicsShop delivers Dynamics 365 enhancements through App's and as SAAS solutions to bring next level automation to your Dynamics 365 Solution.



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