



Dynamics
Shop

User Guide for Microsoft Dynamics 365 Business Central

Product: SD Interface Field Service

Release: D365 BC V24+

Revision: June 2024

1 Contents

2	Getting Started.....	3
3	Installing SD Interface Field Service	4
3.1	Security Setup.....	4
3.2	Choosing the SD Interface Field Service Role	5
3.3	Accessing the SD Interface Field Service Pages.....	6
3.4	Activating the SD Interface Field Service Licence.....	7
3.5	Setup and Configuration.....	8
3.5.1	SD Document Sender Assisted Setup.....	8
4	Using SD Interface Field Service.....	10
4.1	SD Interface Field Service - Setup.....	10
4.2	SD Interface Field Service – Event Types.....	12
4.3	SD Interface Field Service – Events.....	13
4.4	SD Interface Field Service – Events History	14
5	Uninstalling SD Interface Field Service	15

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.

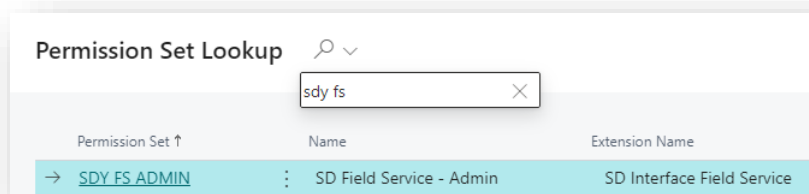
3 Installing SD Interface Field Service

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*).



Permission Set ↑	Name	Extension Name
→ 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).

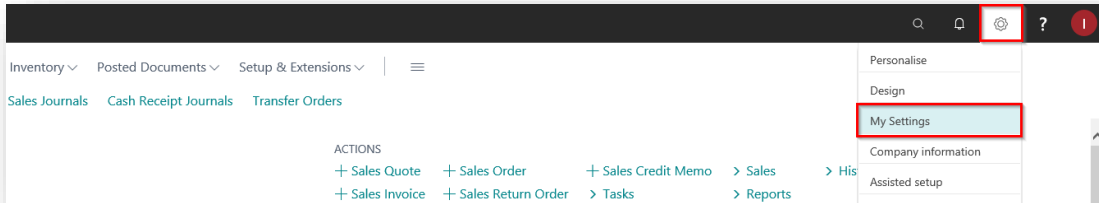


Figure 3-2

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

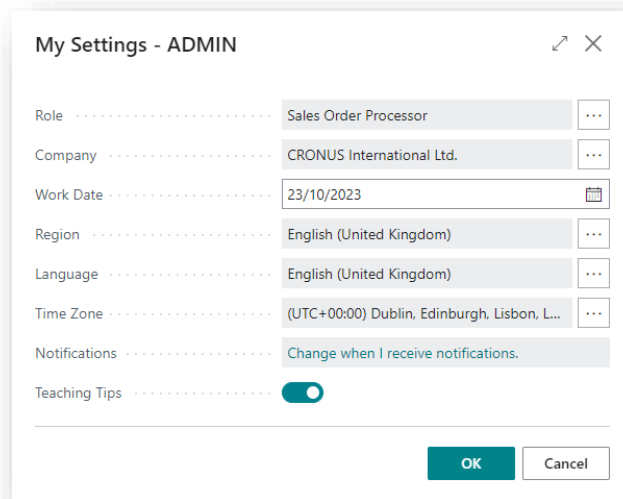


Figure 3-3

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

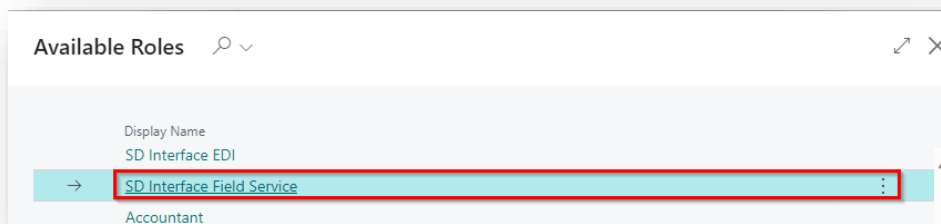


Figure 3-4

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*).

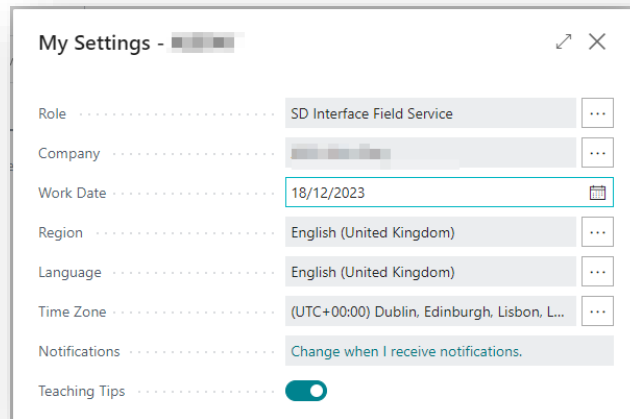


Figure 3-5

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*).

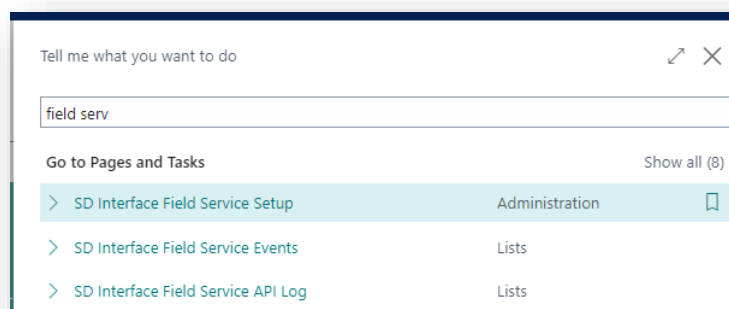


Figure 3-6

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).

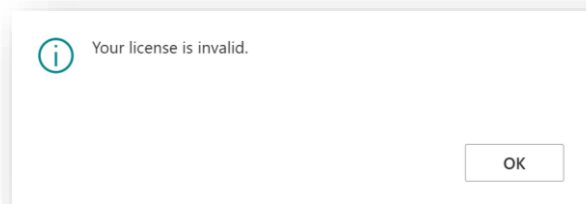


Figure 3-7

2. 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).

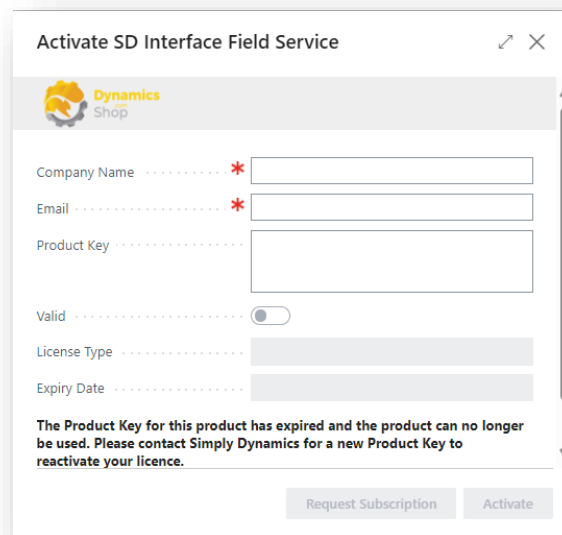


Figure 3-8

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*).

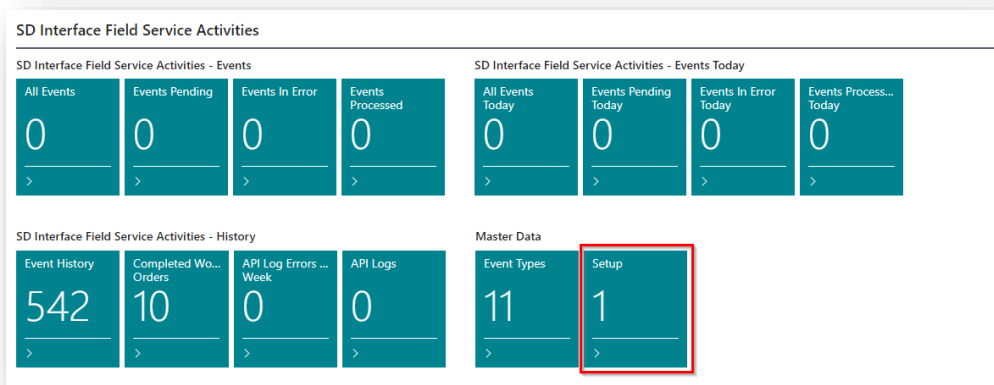


Figure 3-9

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

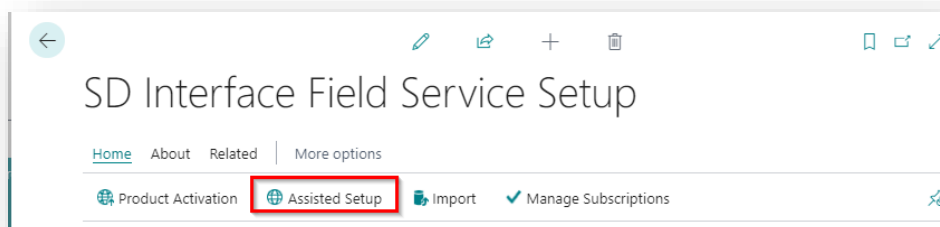


Figure 3-10

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

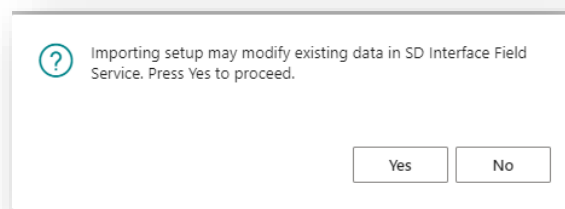


Figure 3-11

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

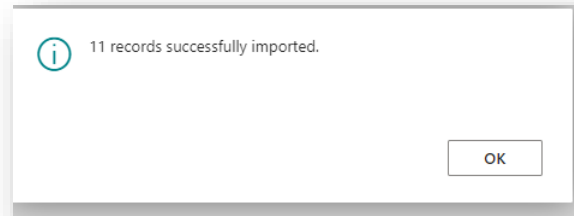


Figure 3-12

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**.

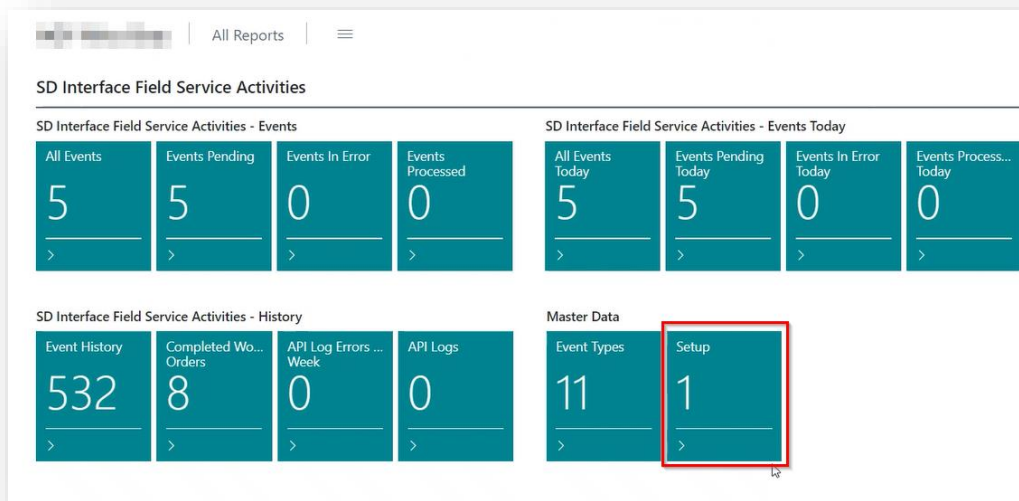


Figure 4-1

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

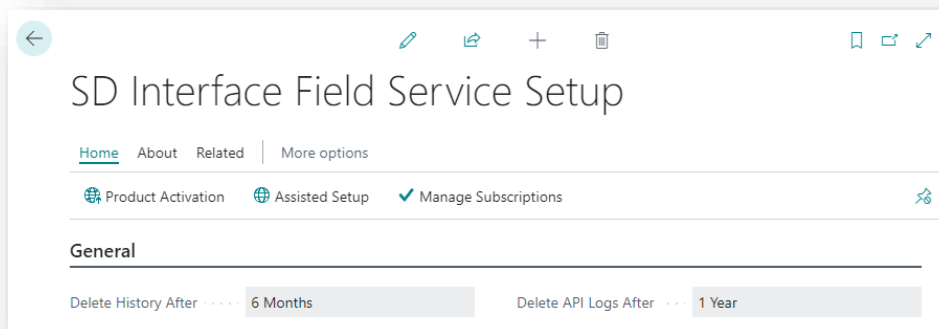


Figure 4-2

- **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).

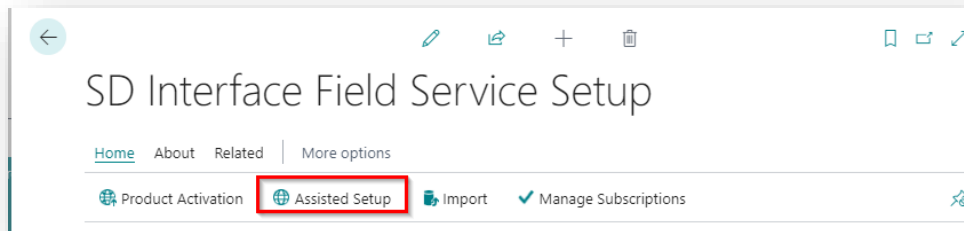


Figure 4-3

- **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).

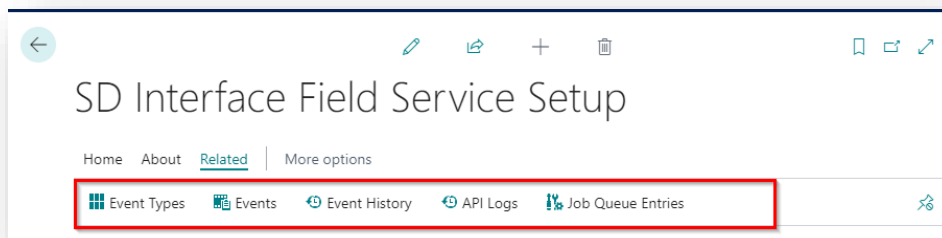
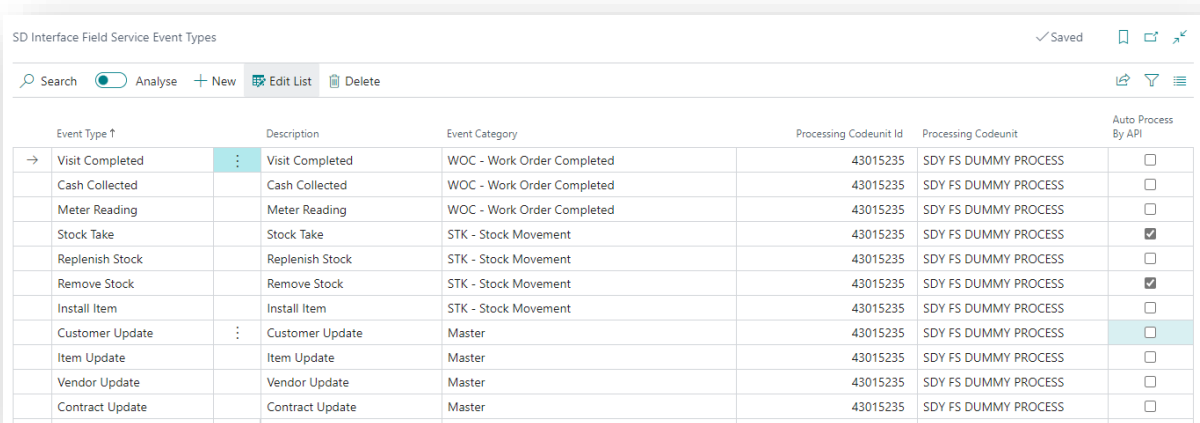


Figure 4-4

- **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).



Event Type ↑	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	<input type="checkbox"/>
Cash Collected	Cash Collected	WOC - Work Order Completed	43015235	SDY FS DUMMY PROCESS	<input type="checkbox"/>
Meter Reading	Meter Reading	WOC - Work Order Completed	43015235	SDY FS DUMMY PROCESS	<input type="checkbox"/>
Stock Take	Stock Take	STK - Stock Movement	43015235	SDY FS DUMMY PROCESS	<input checked="" type="checkbox"/>
Replenish Stock	Replenish Stock	STK - Stock Movement	43015235	SDY FS DUMMY PROCESS	<input type="checkbox"/>
Remove Stock	Remove Stock	STK - Stock Movement	43015235	SDY FS DUMMY PROCESS	<input checked="" type="checkbox"/>
Install Item	Install Item	STK - Stock Movement	43015235	SDY FS DUMMY PROCESS	<input type="checkbox"/>
Customer Update	Customer Update	Master	43015235	SDY FS DUMMY PROCESS	<input type="checkbox"/>
Item Update	Item Update	Master	43015235	SDY FS DUMMY PROCESS	<input type="checkbox"/>
Vendor Update	Vendor Update	Master	43015235	SDY FS DUMMY PROCESS	<input type="checkbox"/>
Contract Update	Contract Update	Master	43015235	SDY FS DUMMY PROCESS	<input type="checkbox"/>

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.

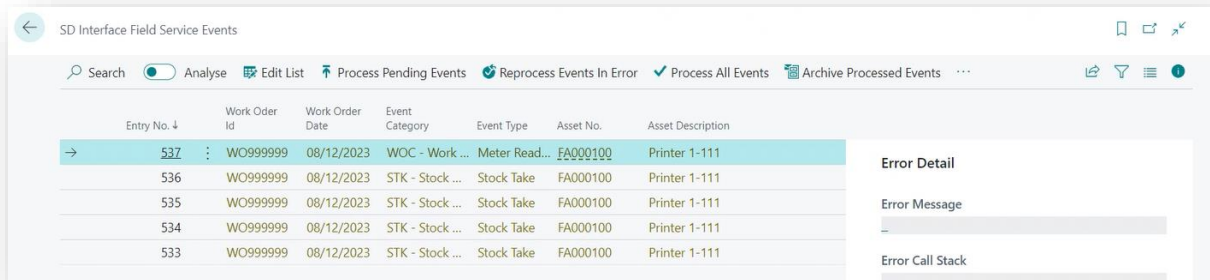


Figure 4-6

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

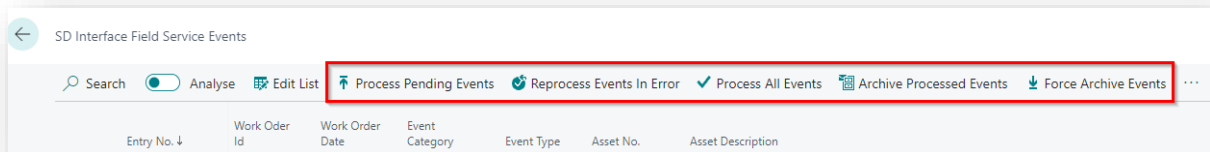


Figure 4-7

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

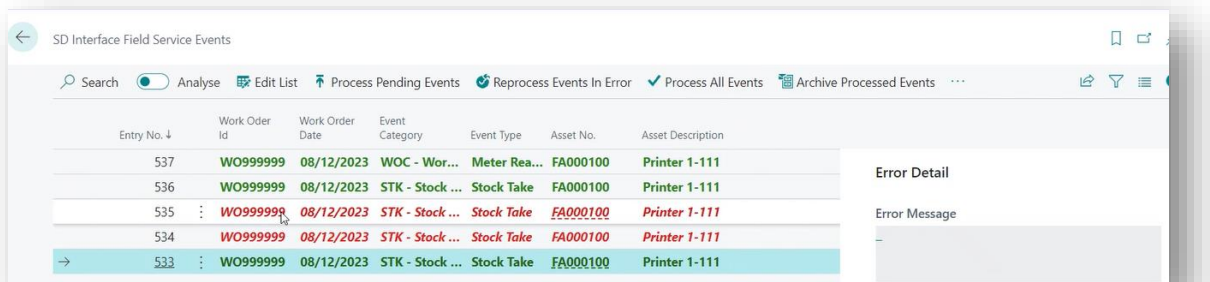
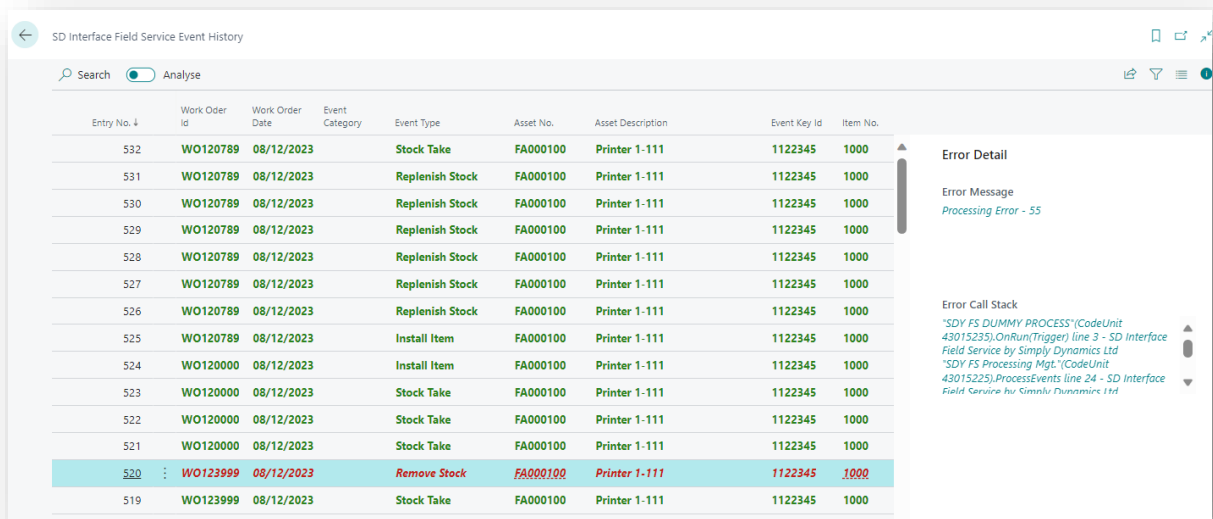


Figure 4-8

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).



Entry No. ↓	Work Order Id	Work Order Date	Event Category	Event Type	Asset No.	Asset Description	Event Key Id	Item No.
532	WO120789	08/12/2023		Stock Take	FA000100	Printer 1-111	1122345	1000
531	WO120789	08/12/2023		Replenish Stock	FA000100	Printer 1-111	1122345	1000
530	WO120789	08/12/2023		Replenish Stock	FA000100	Printer 1-111	1122345	1000
529	WO120789	08/12/2023		Replenish Stock	FA000100	Printer 1-111	1122345	1000
528	WO120789	08/12/2023		Replenish Stock	FA000100	Printer 1-111	1122345	1000
527	WO120789	08/12/2023		Replenish Stock	FA000100	Printer 1-111	1122345	1000
526	WO120789	08/12/2023		Replenish Stock	FA000100	Printer 1-111	1122345	1000
525	WO120789	08/12/2023		Install Item	FA000100	Printer 1-111	1122345	1000
524	WO120000	08/12/2023		Install Item	FA000100	Printer 1-111	1122345	1000
523	WO120000	08/12/2023		Stock Take	FA000100	Printer 1-111	1122345	1000
522	WO120000	08/12/2023		Stock Take	FA000100	Printer 1-111	1122345	1000
521	WO120000	08/12/2023		Stock Take	FA000100	Printer 1-111	1122345	1000
520	WO123999	08/12/2023		Remove Stock	FA000100	Printer 1-111	1122345	1000
519	WO123999	08/12/2023		Stock Take	FA000100	Printer 1-111	1122345	1000

Error Detail

Error Message
Processing Error - 55

Error Call Stack
 SDY FS DUMMY PROCESS(CodeUnit
 43015235).OnRun(Trigger) line 3 - SD Interface
 Field Service by Simply Dynamics Ltd
 SDY FS Processing Mgt.(CodeUnit
 43015225).ProcessEvent line 24 - SD Interface
 Field Service by Simply Dynamics Ltd

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).

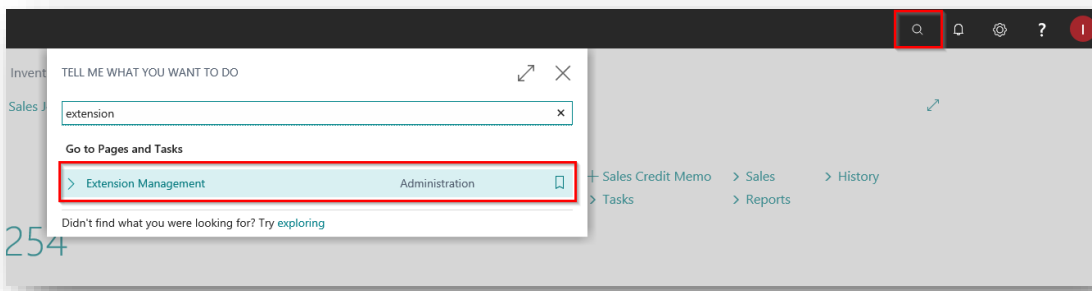


Figure 5-1

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).

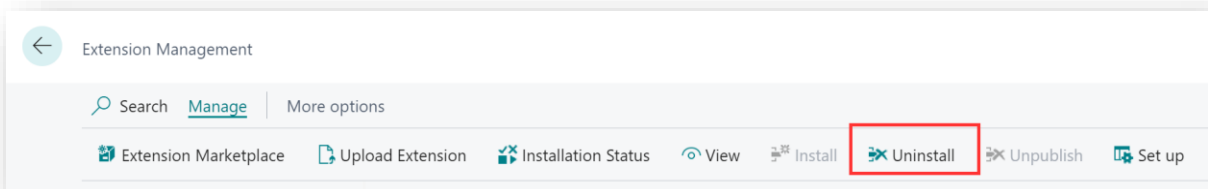


Figure 5-2



Dynamics Shop

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.



DynAzure delivers cloud only, low cost & standardised model rapid deployment Dynamics 365 Projects and support utilising standard features and enhanced Apps.

Dublin Location

📍 Unit 4, 4075 Kingswood Rd,
Citywest Business Campus,
Dublin, D24 H972, Ireland

[Get Directions](#)

☎ +353 1 687 6600

✉ info@simplyd.ie