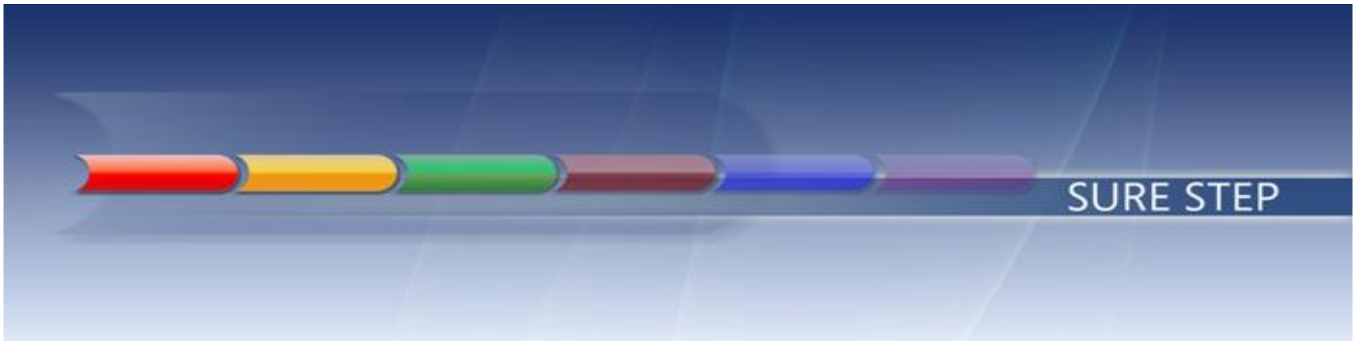


Acumens Software Sales & Services

Version: MS Dynamics BC25

Prepared & developed by

SBC Dynamics ERP.

Document History

Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
1.0	04-01-2025		Document Prepared

Table of Contents

1. Assumptions. 4
2. Role Center. 5
3. Software Sales. 6
4. Project and Project Work Orders. 16
   - 4.1. Create Work Orders. 16
   - 4.2. Work Order Approval Process 25
   - 4.3. Release the Work Order. 25
   - 4.4. Create Project Invoice for billing. 29
5. Process Credit Card and ACH payments. 32
   - 5.1. Credit Card Transaction. 33
   - 5.2. ACH Transaction. 42
6. Emailing and e-Receivables. 46
   - 6.1. e-Receivables for SMFee and APS Documents. 46
   - 6.2. Acumens e-Mailing. 48

1. Assumptions.

For this documentation, it is assumed that the user is already familiar with the processes and features of the following Add-ons.

- Acumens Subscription & Maintenance Fee Billing.
- Acumens Professional Services Management.
- Acumens e-Payments.
- Acumens Emailing.
- Acumens e-Receivables Management.

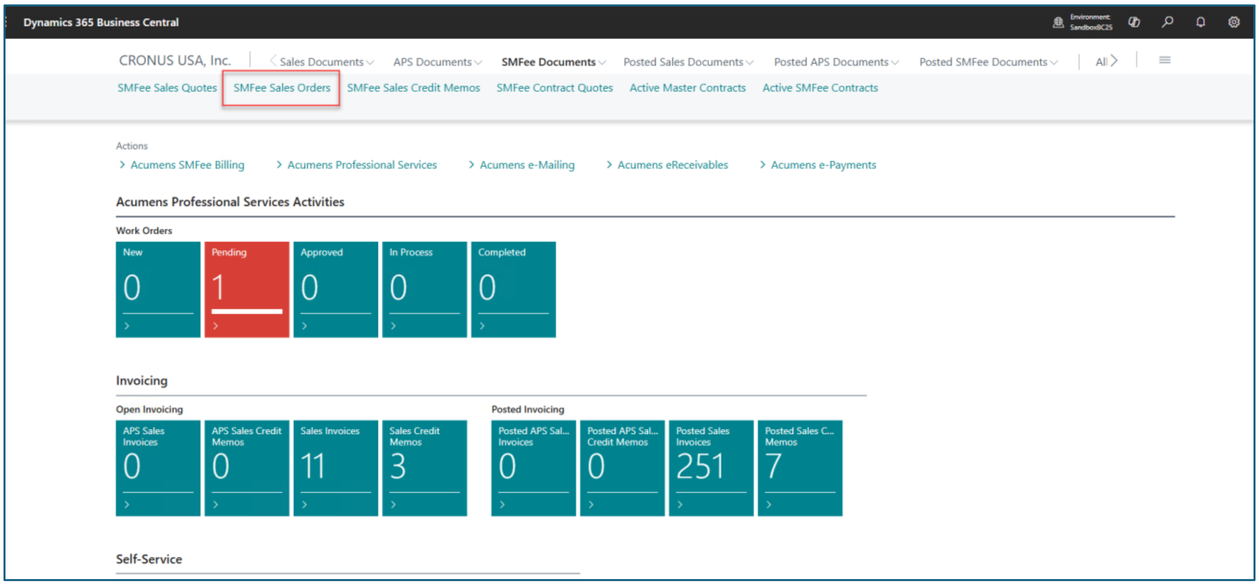
2. Role Center.

3. Software Sales.

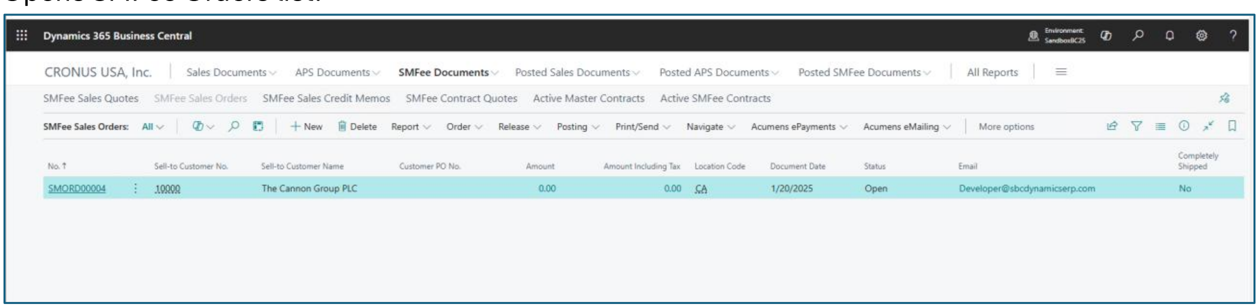
Licenses and Software sales are handled and processed through the Acumens Subscription & Maintenance Fee Billing Add-on which is part of the app packages that make up Acumens Software Sales and Services app.

SMFee Sales Orders are used to sales licenses or Software.

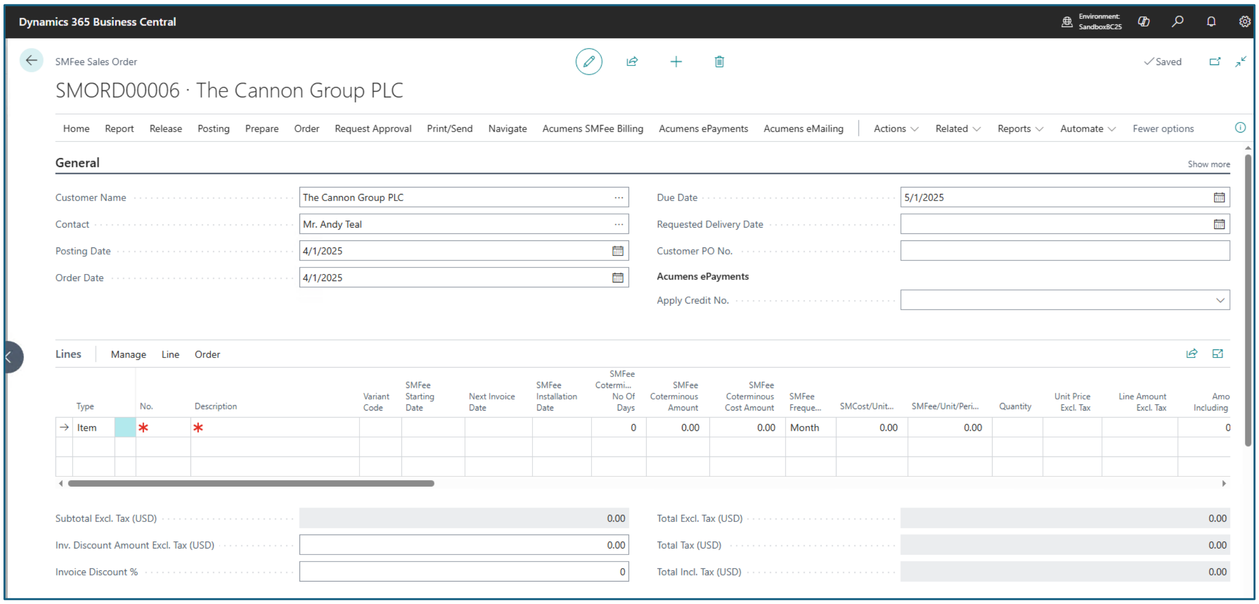
To create and process a SMFee Sales Order, on the role center navigate to SMFee Documents > SMFee Sales Orders. This is also available by search.



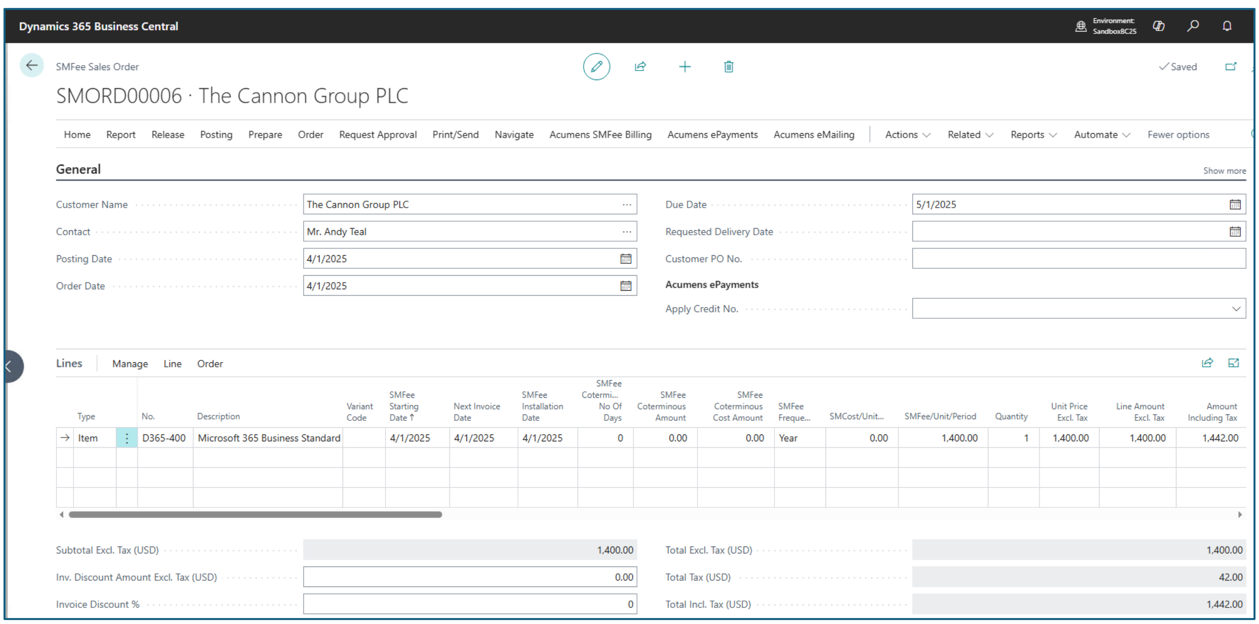
Opens SMFee Orders list.



Create a new Order and Select customer.



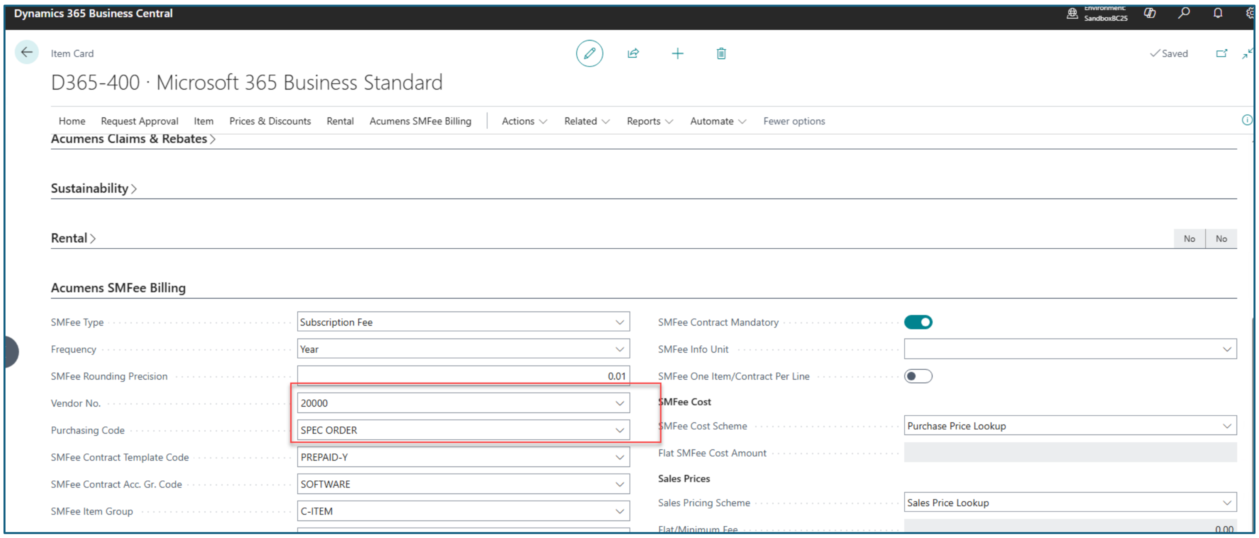
On the Order lines, select the Item and update SMFee Start and Next invoice date.



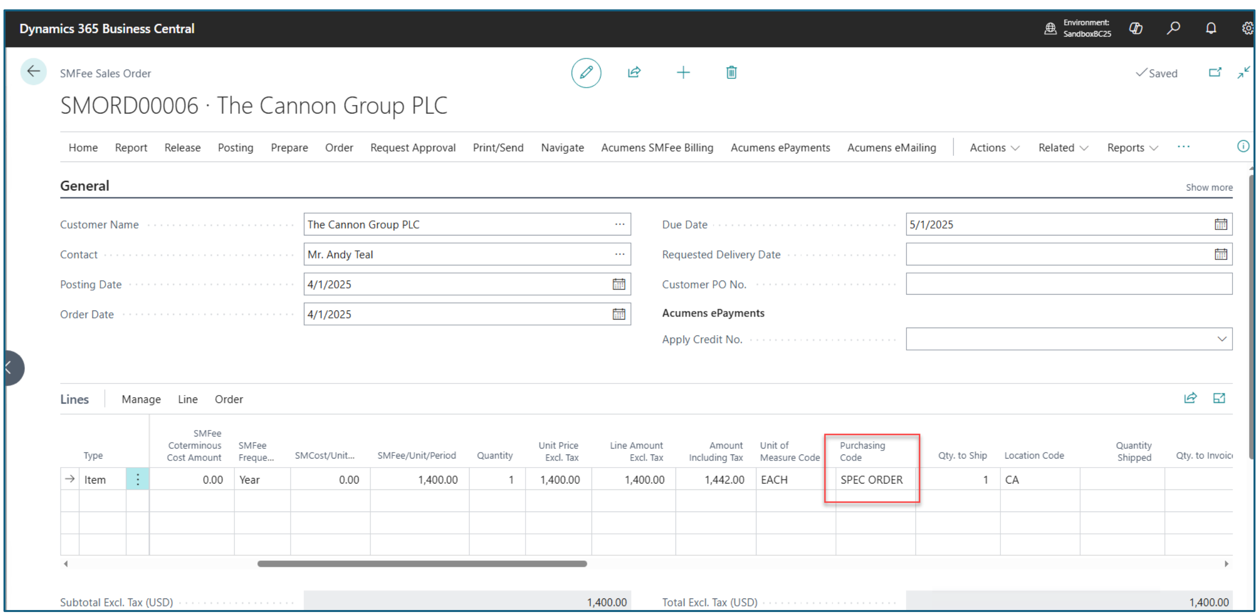
In some cases, you may be purchasing the softwares or licenses you sell directly from you vendor. In this case, you can opt to create a purchase order directly from the SMFee Sales Order. This is not a mandatory step.

To do that,

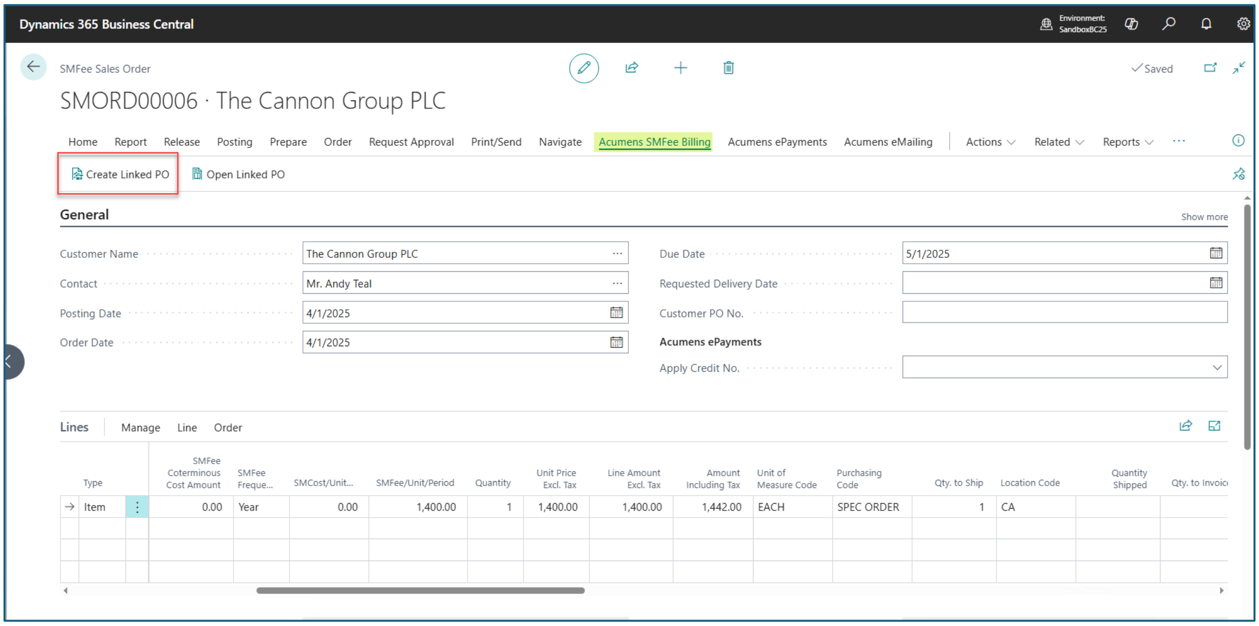
a. Ensure the Vendor No. and the Purchasing code on the item is populated.

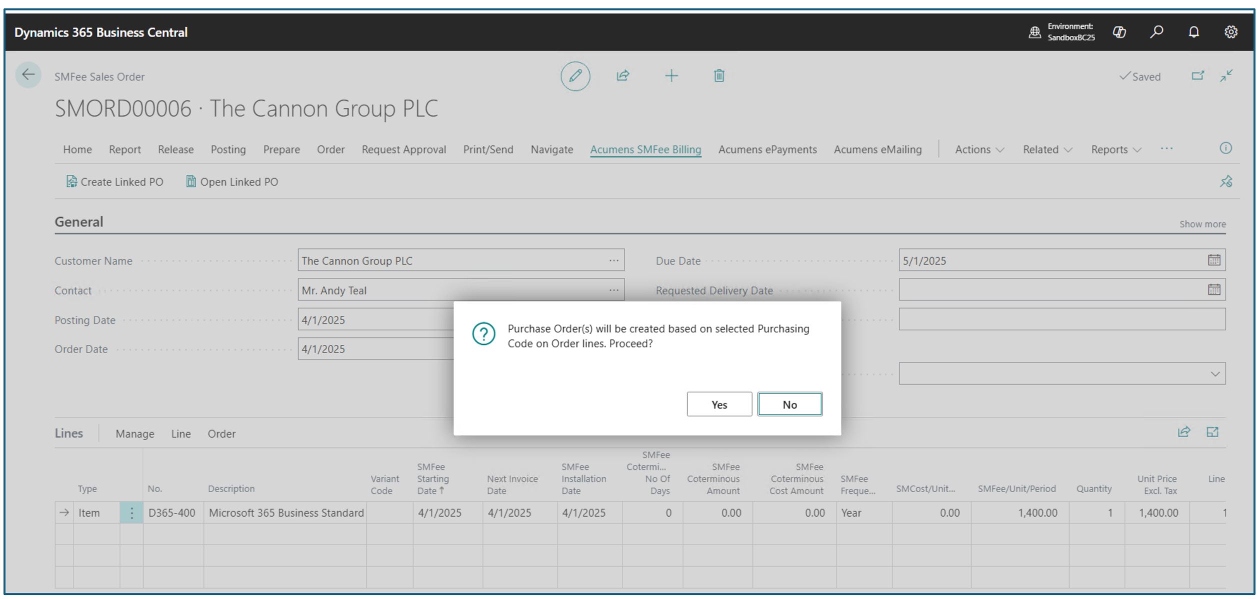


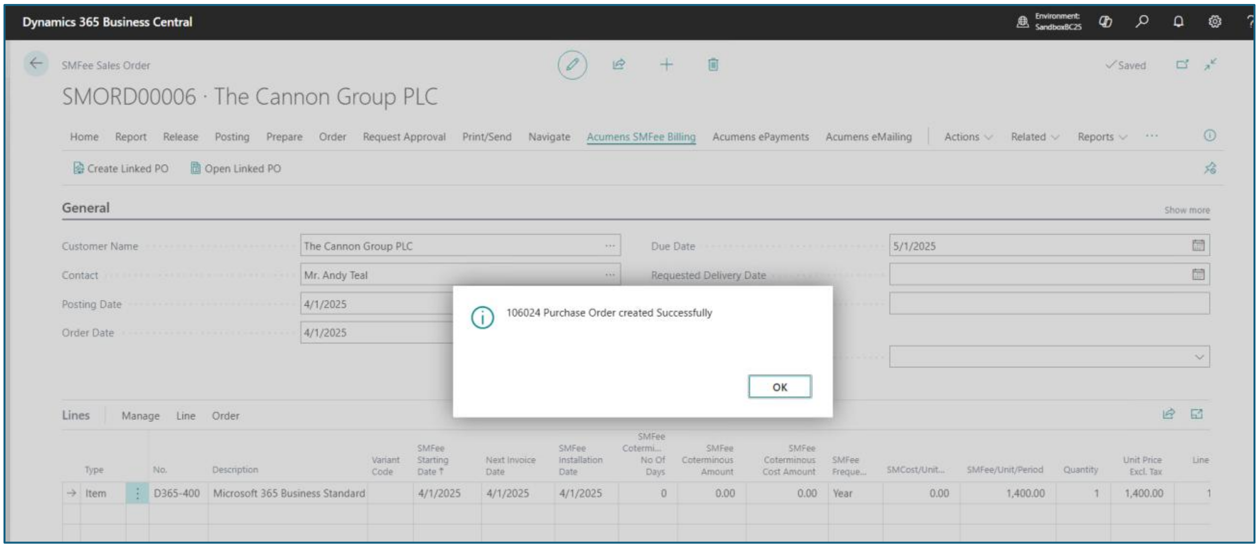
b. These are defaulted to the sales line when the item is selected but user can be change.



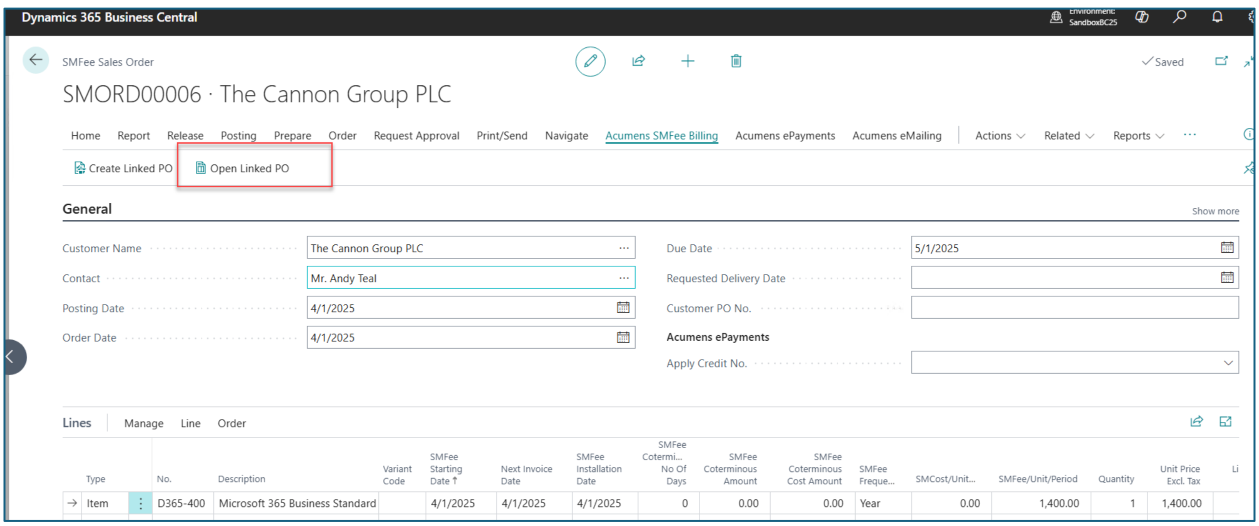
c. Release the order. On the action ribbon go to "Acumens SMFee Billing" and click on "Create Linked PO" action to create a purchase Order.

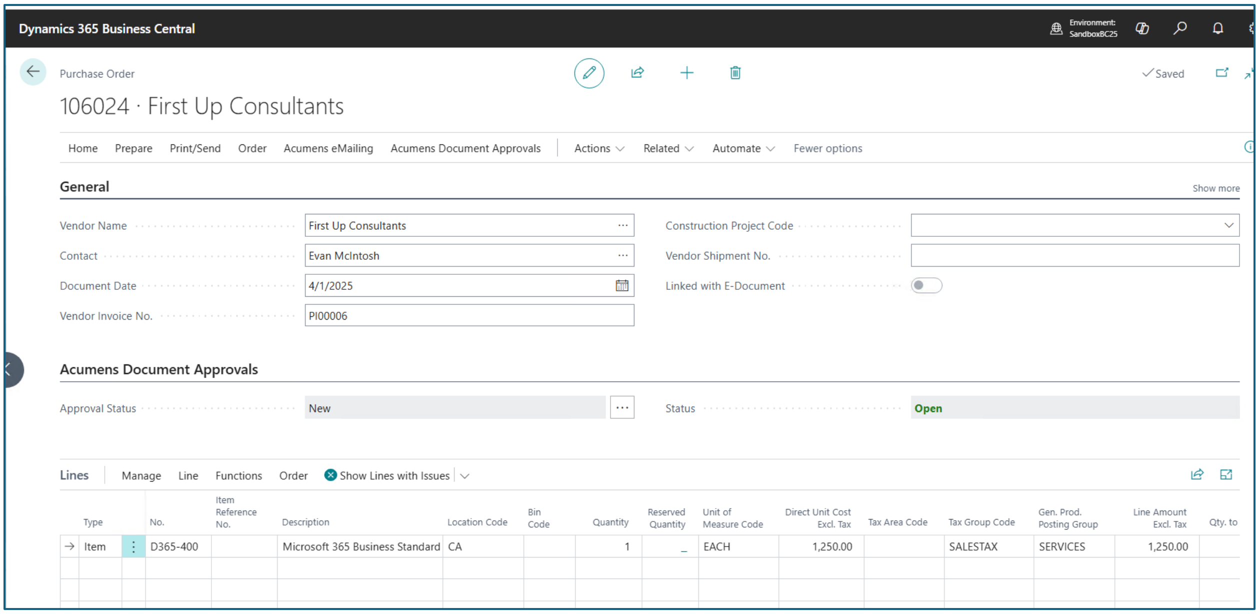




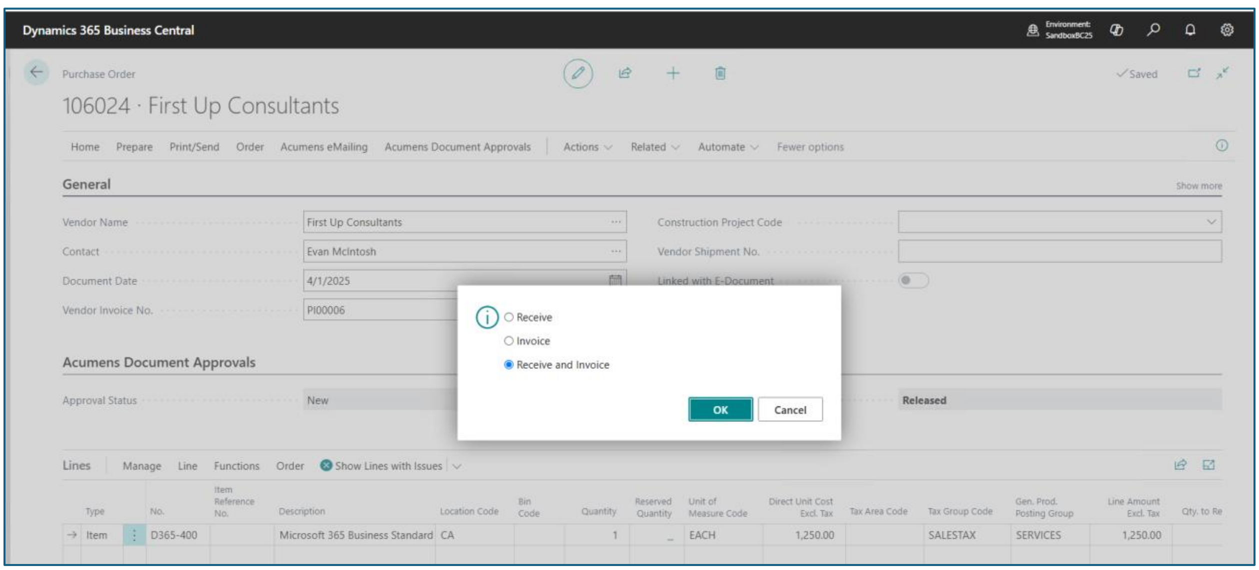


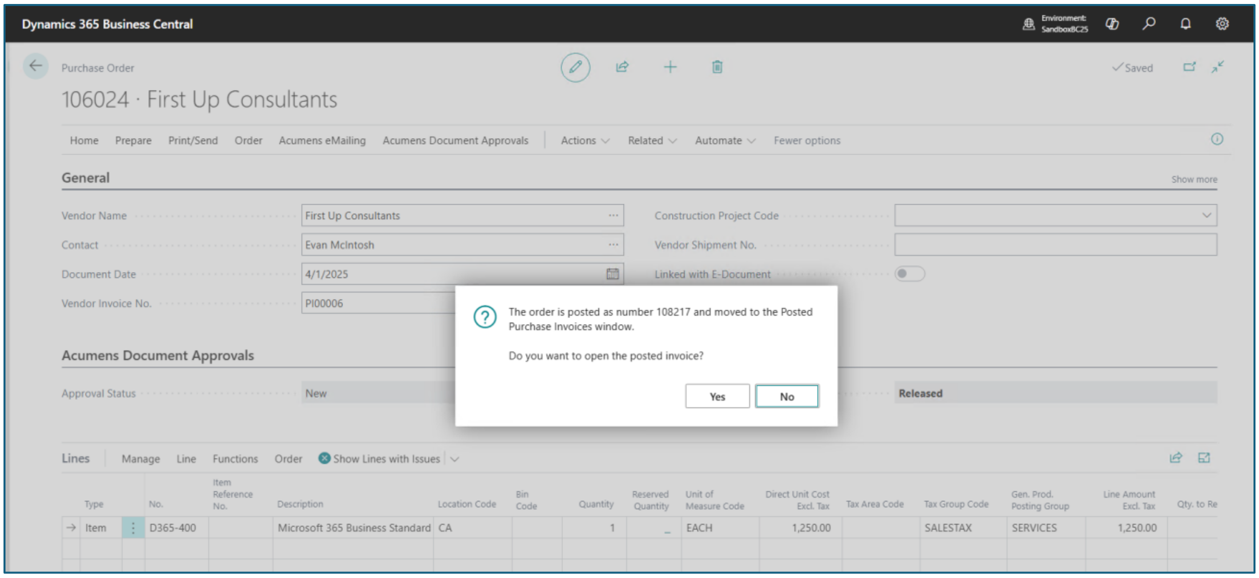
d. Open to view the created Purchase Order.

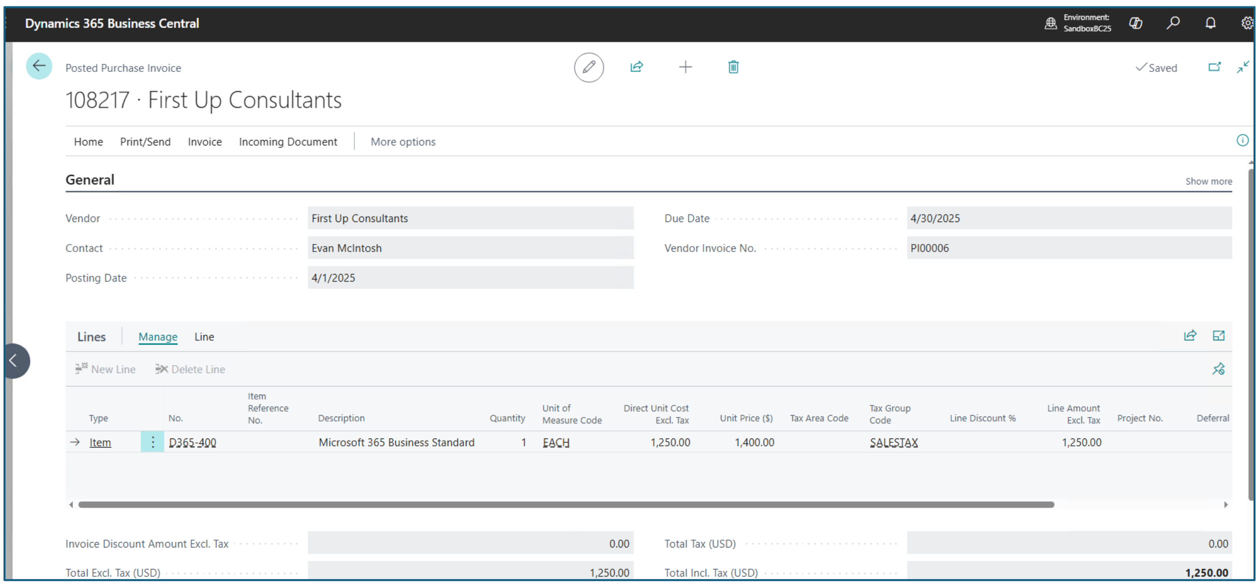




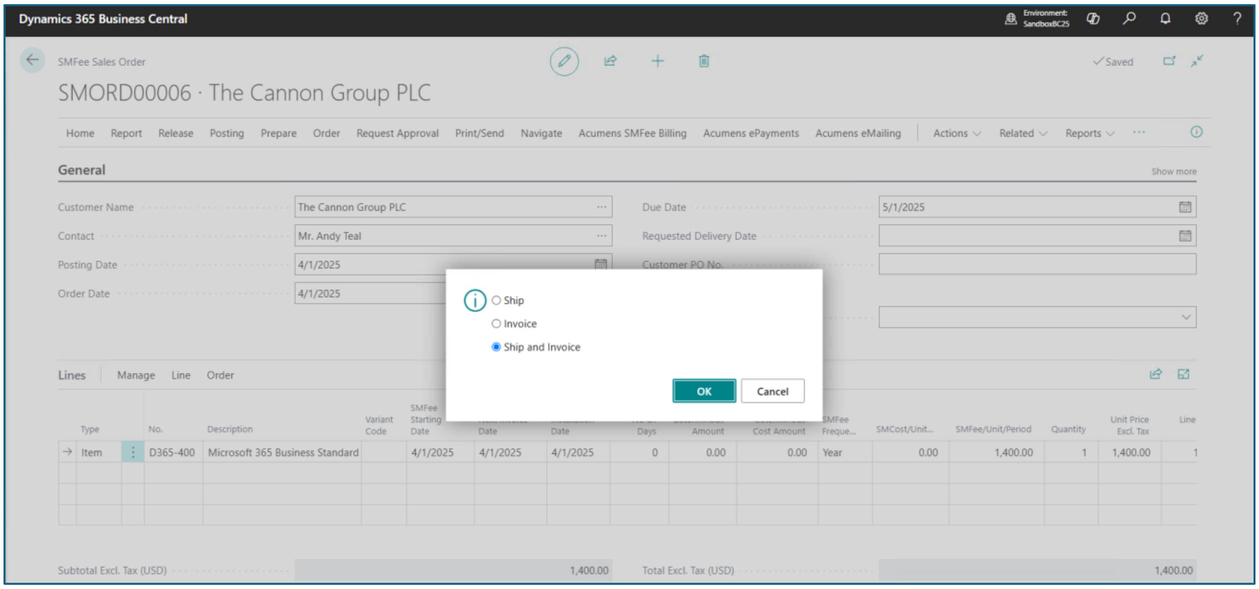
e. Update Vendor Invoice No., Release and post purchase order.

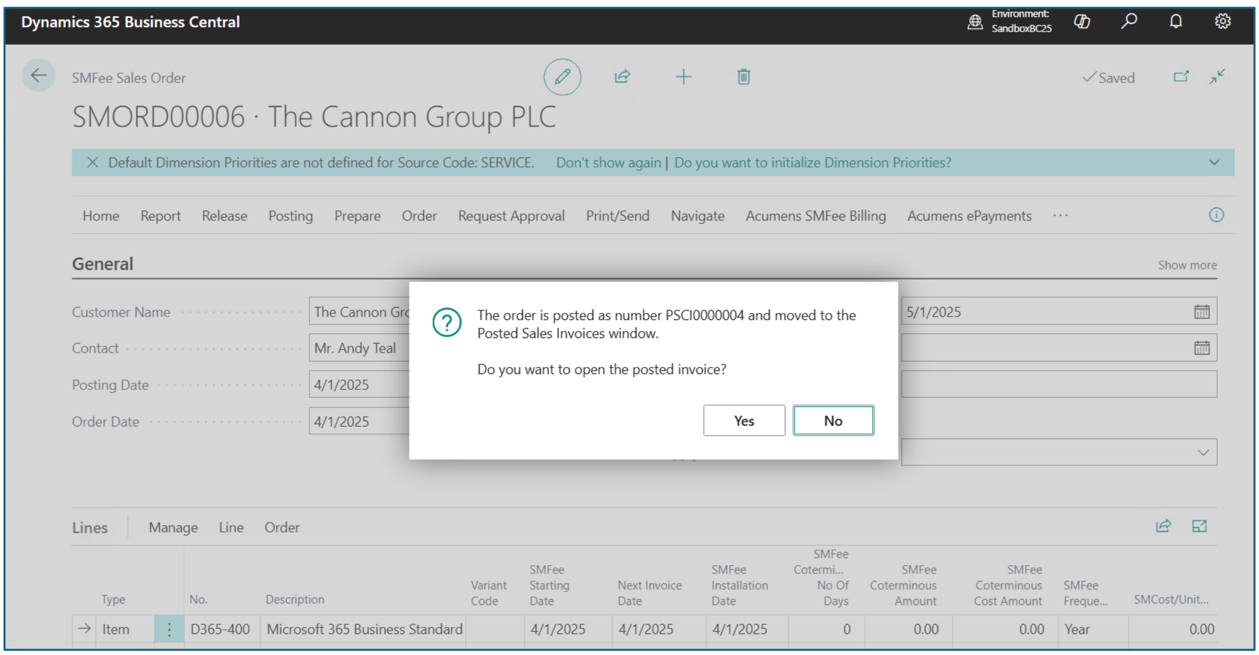


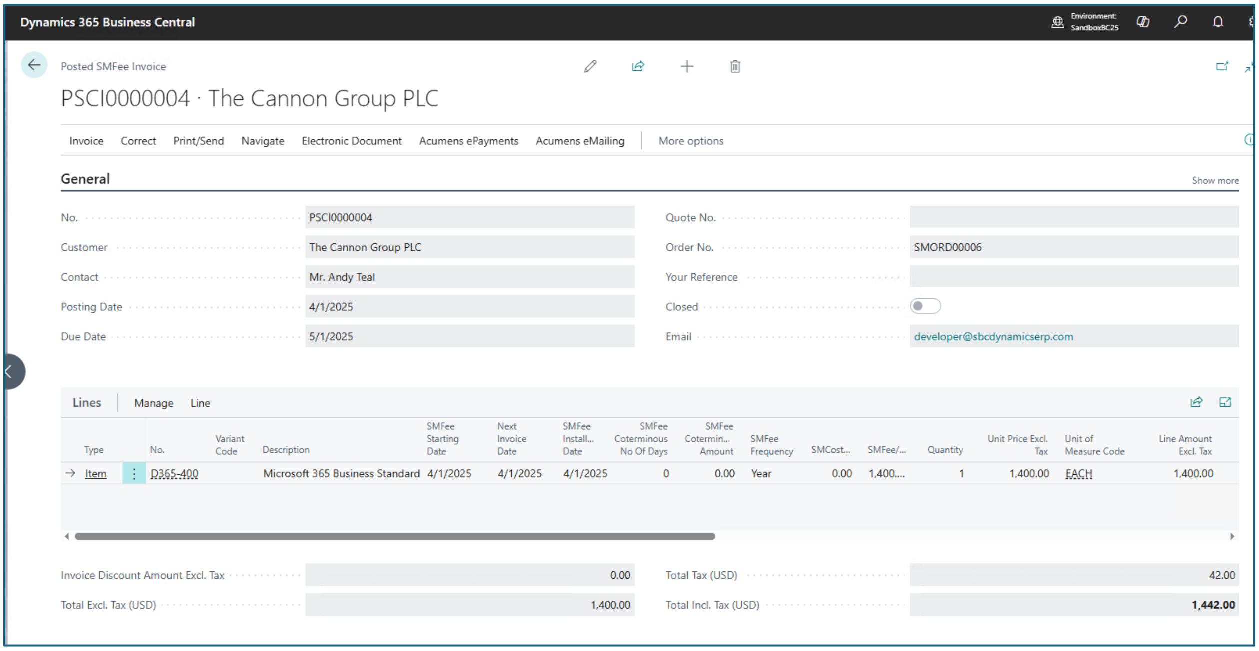

Dynamics 365 Business Central
Purchase Order
106024 · First Up Consultants
Saved
Home
Prepare
Print/Send
Order
Acumens eMailing
Acumens Document Approvals
Actions
Related
Automate
Fewer options
General
Show more
Vendor Name
First Up Consultants
Contact
Evan McIntosh
Document Date
4/1/2025
Vendor Invoice No.
PI00006
Construction Project Code
Vendor Shipment No.
Linked with E-Document
The order is posted as number 108217 and moved to the Posted Purchase Invoices window.
Do you want to open the posted invoice?
Yes
No
Acumens Document Approvals
Approval Status
New
Released
Lines
Manage
Line
Functions
Order
Show Lines with Issues
Type
No.
Item Reference No.
Description
Location Code
Bin Code
Quantity
Reserved Quantity
Unit of Measure Code
Direct Unit Cost Excl. Tax
Tax Area Code
Tax Group Code
Gen. Prod. Posting Group
Line Amount Excl. Tax
Qty. to Re
Item
D365-400
Microsoft 365 Business Standard
CA
1
EACH
1,250.00
SALESTAX
SERVICES
1,250.00


Dynamics 365 Business Central
Posted Purchase Invoice
108217 · First Up Consultants
Saved
Home
Print/Send
Invoice
Incoming Document
More options
General
Show more
Vendor
First Up Consultants
Contact
Evan McIntosh
Posting Date
4/1/2025
Due Date
4/30/2025
Vendor Invoice No.
PI00006
Lines
Manage
Line
New Line
Delete Line
Type
No.
Item Reference No.
Description
Quantity
Unit of Measure Code
Direct Unit Cost Excl. Tax
Unit Price ($)
Tax Area Code
Tax Group Code
Line Discount %
Line Amount Excl. Tax
Project No.
Deferral
Item
D365-400
Microsoft 365 Business Standard
1
EACH
1,250.00
1,400.00
SALESTAX
1,250.00
Invoice Discount Amount Excl. Tax
0.00
Total Tax (USD)
0.00
Total Excl. Tax (USD)
1,250.00
Total Incl. Tax (USD)
1,250.00

Proceed to post the SMFee Sales Order.

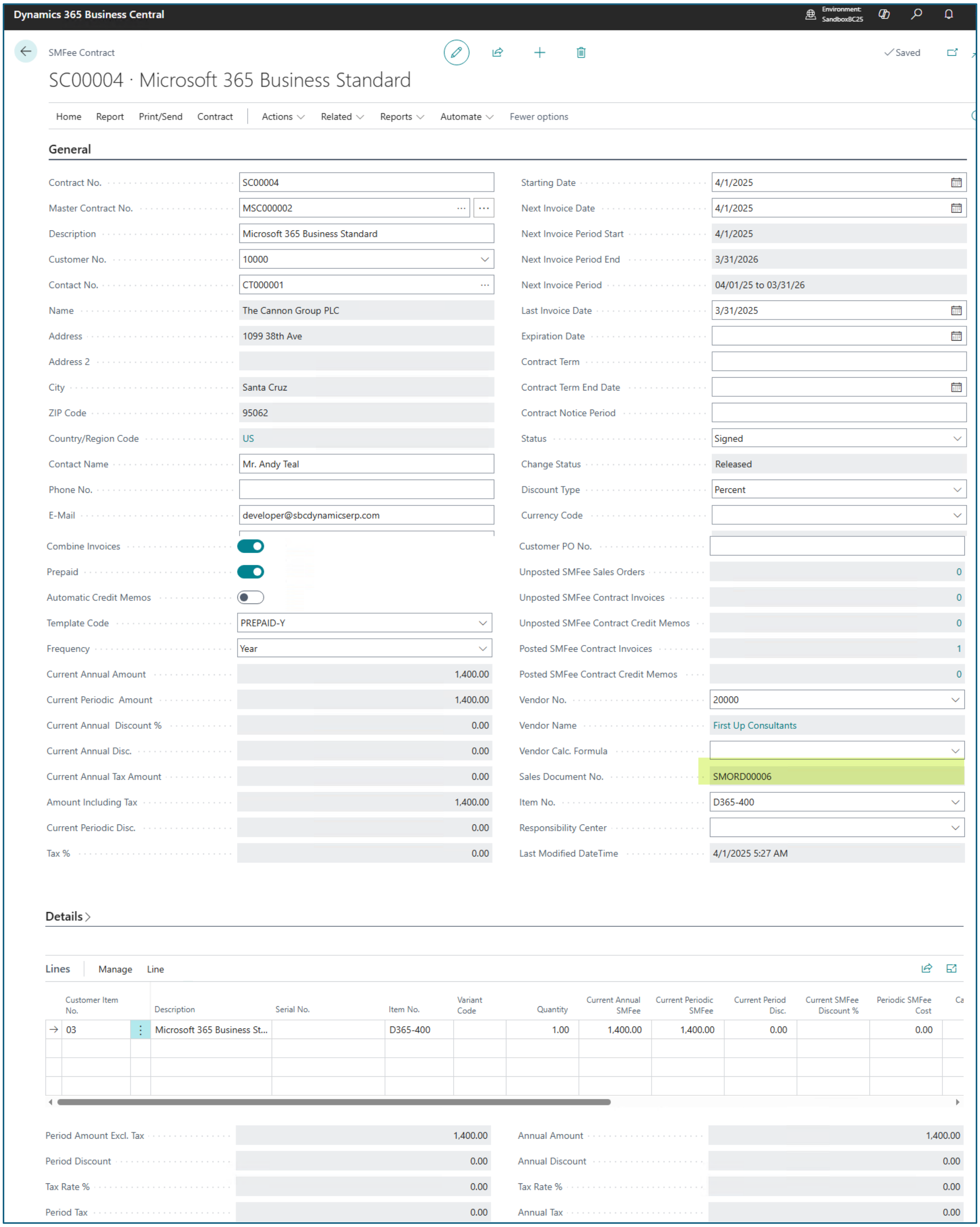






Dynamics 365 Business Central
Environment: SandboxBC25
Posted SMFee Invoice
PSCI0000004 · The Cannon Group PLC
Invoice
Correct
Print/Send
Navigate
Electronic Document
Acumens ePayments
Acumens eMailing
More options
General
Show more
No. PSCI0000004
Customer The Cannon Group PLC
Contact Mr. Andy Teal
Posting Date 4/1/2025
Due Date 5/1/2025
Quote No.
Order No. SMORD00006
Your Reference
Closed
Email developer@sbcdynamicserp.com
Lines
Manage
Line
Type
No.
Variant Code
Description
SMFee Starting Date
Next Invoice Date
SMFee Install... Date
SMFee Coterminous No Of Days
SMFee Cotermin... Amount
SMFee Frequency
SMCost...
SMFee/...
Quantity
Unit Price Excl. Tax
Unit of Measure Code
Line Amount Excl. Tax
Item
D365-400
Microsoft 365 Business Standard
4/1/2025
4/1/2025
4/1/2025
0
0.00
Year
0.00
1,400....
1
1,400.00
EACH
1,400.00
Invoice Discount Amount Excl. Tax 0.00
Total Excl. Tax (USD) 1,400.00
Total Tax (USD) 42.00
Total Incl. Tax (USD) 1,442.00

SMFee Contract is also created when the order is posted. This will serve as an agreement with your customer, and it will allow you to bill renewal or maintenance fees when next due.



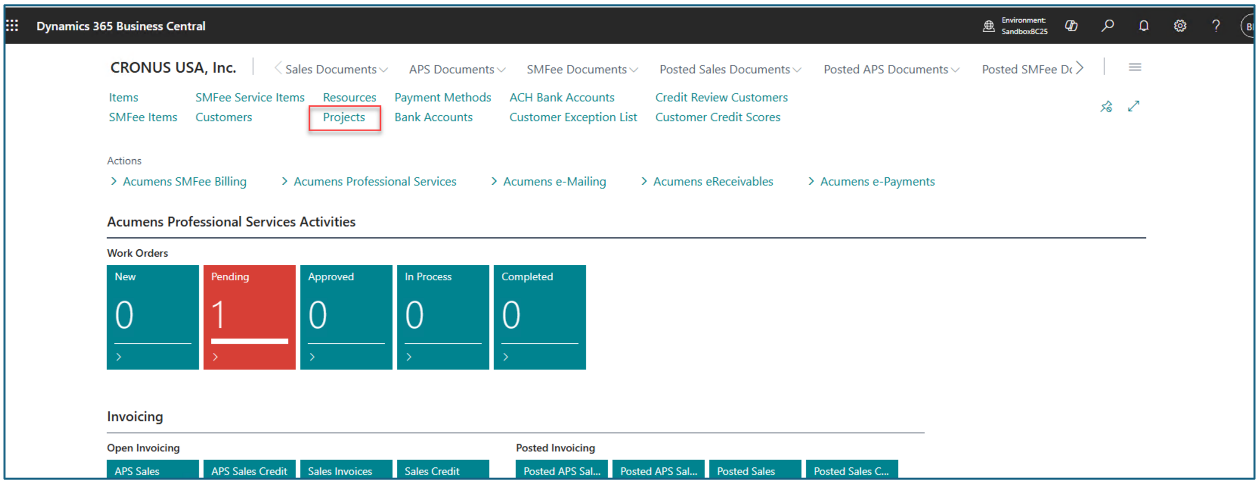
4. Project and Project Work Orders.

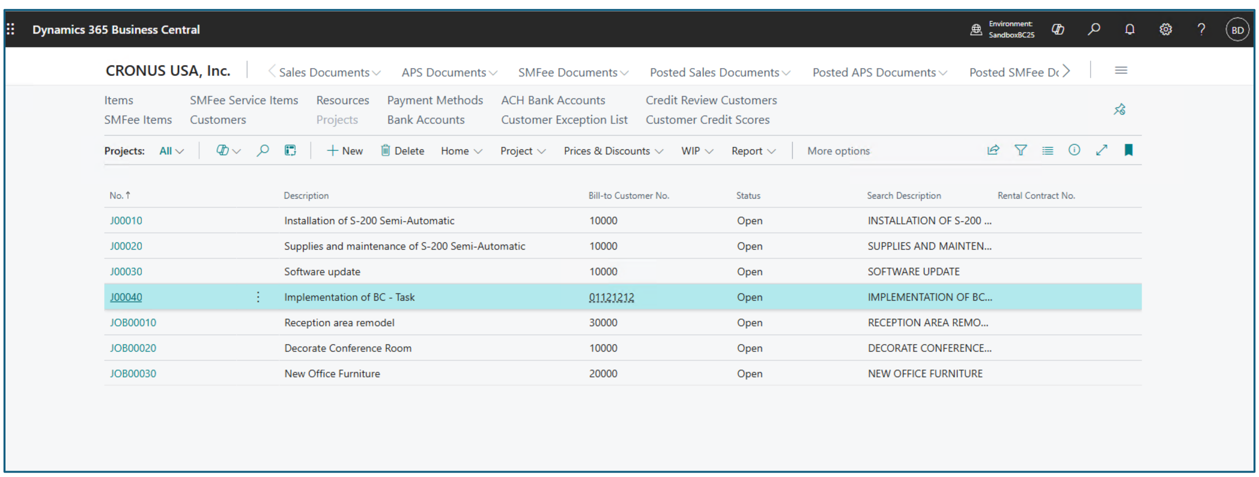
Acumens Professional Services Management Add-on provides an option to manage the projects, resources, billing and budget through the Work Orders. Projects are created and managed on the Standard Microsoft Projects Module.

4.1. Create Work Orders.

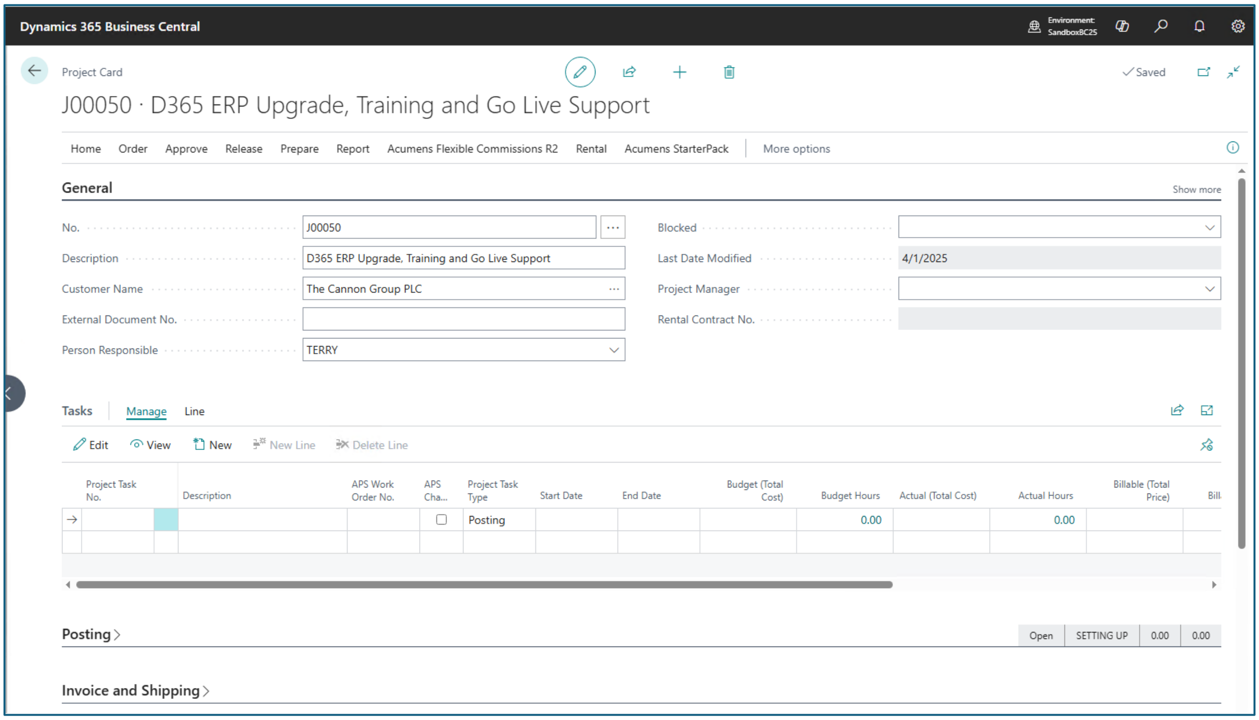
To create and process Work orders,

Go to or Search for Projects.

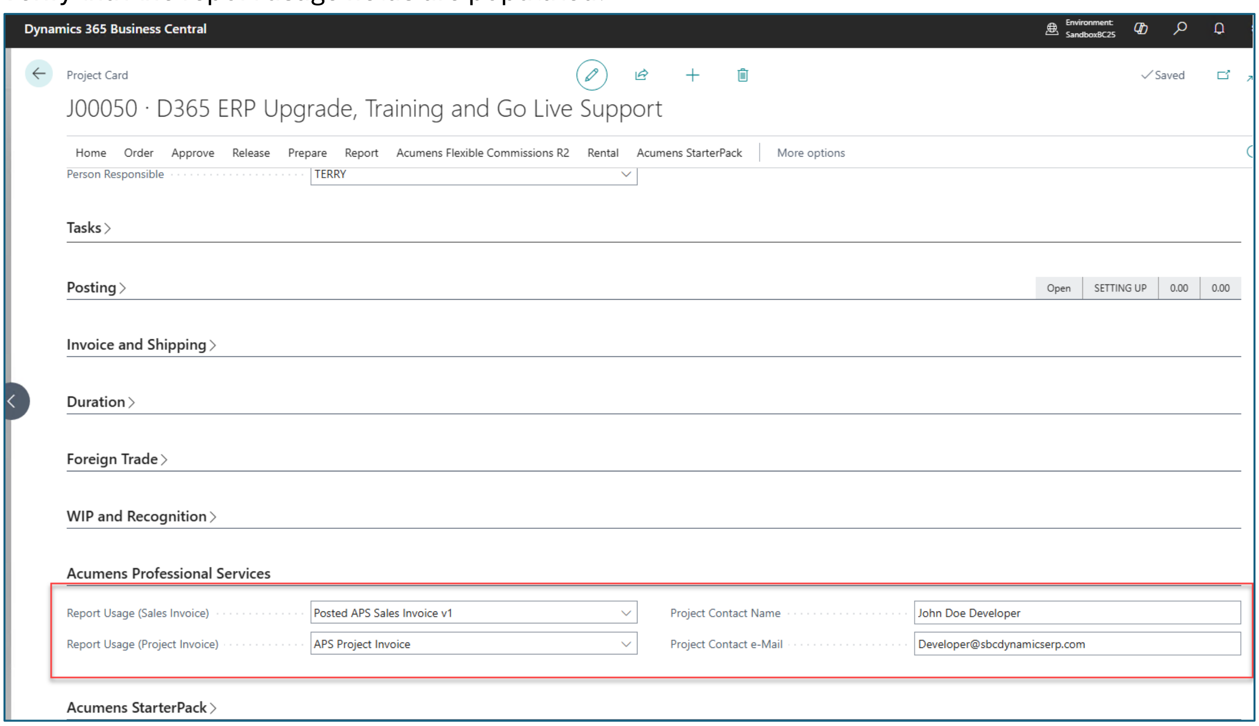




Create a new Project,

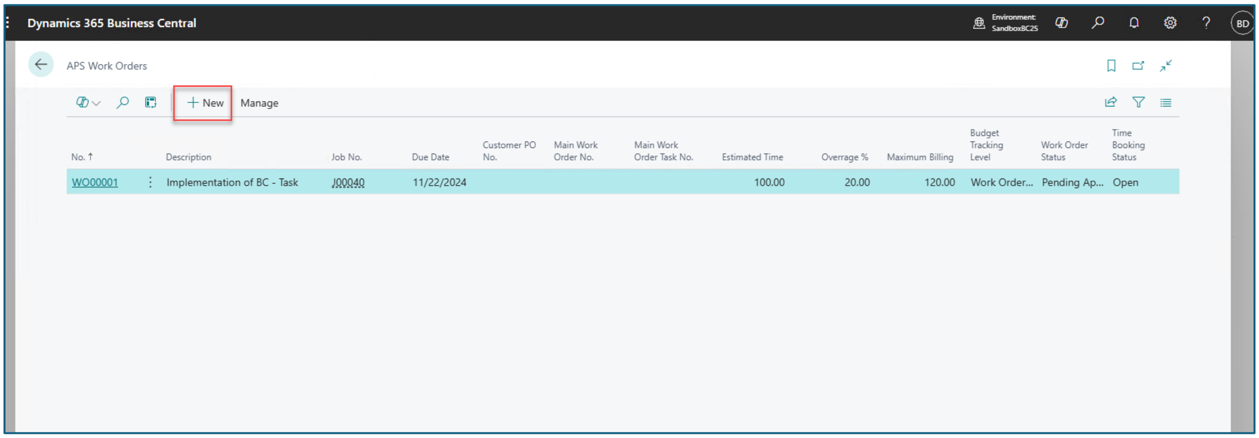


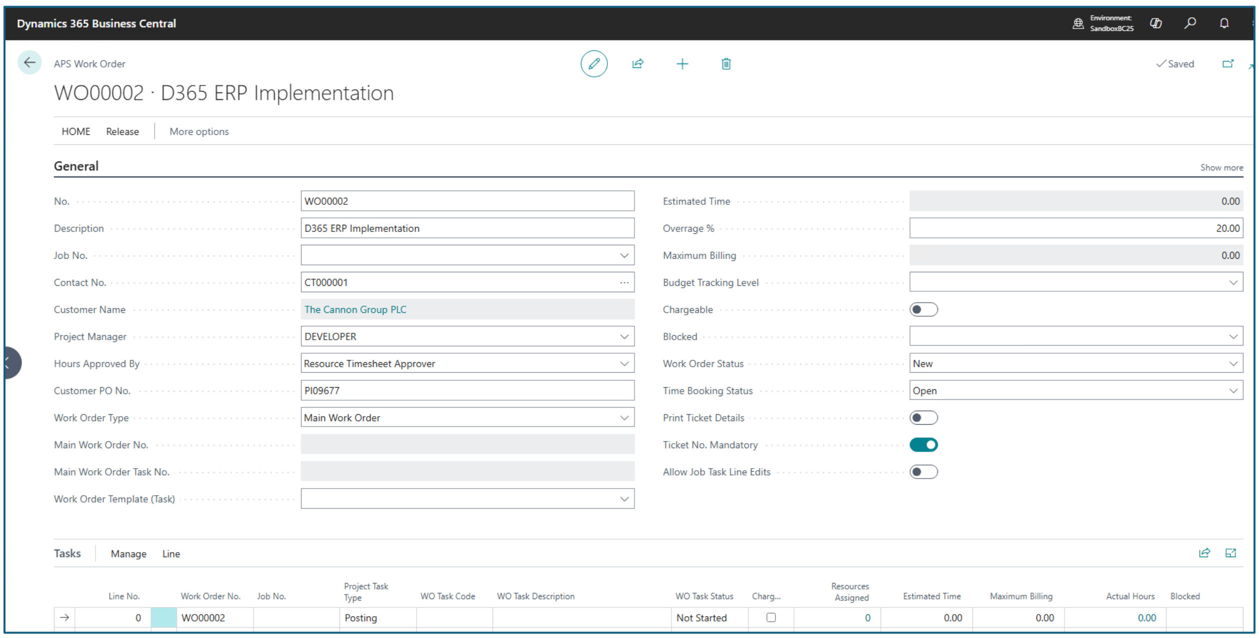
Verify that the report usage fields are populated.



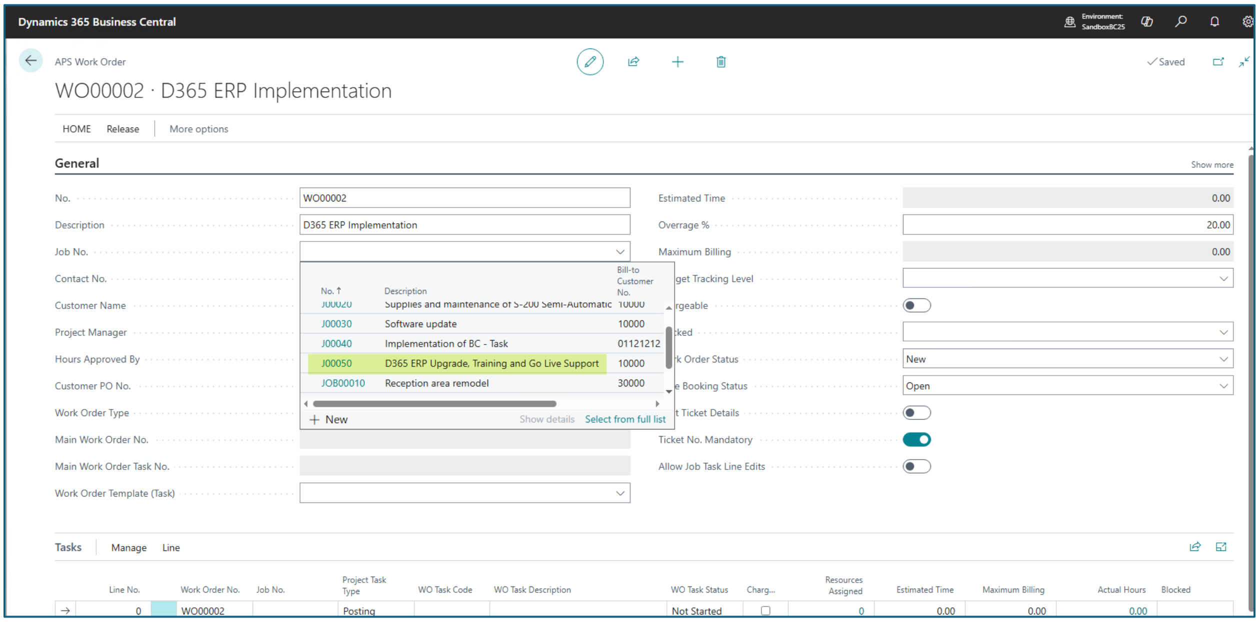
At this point, it is not necessary to enter the project task lines. This will be updated automatically later.

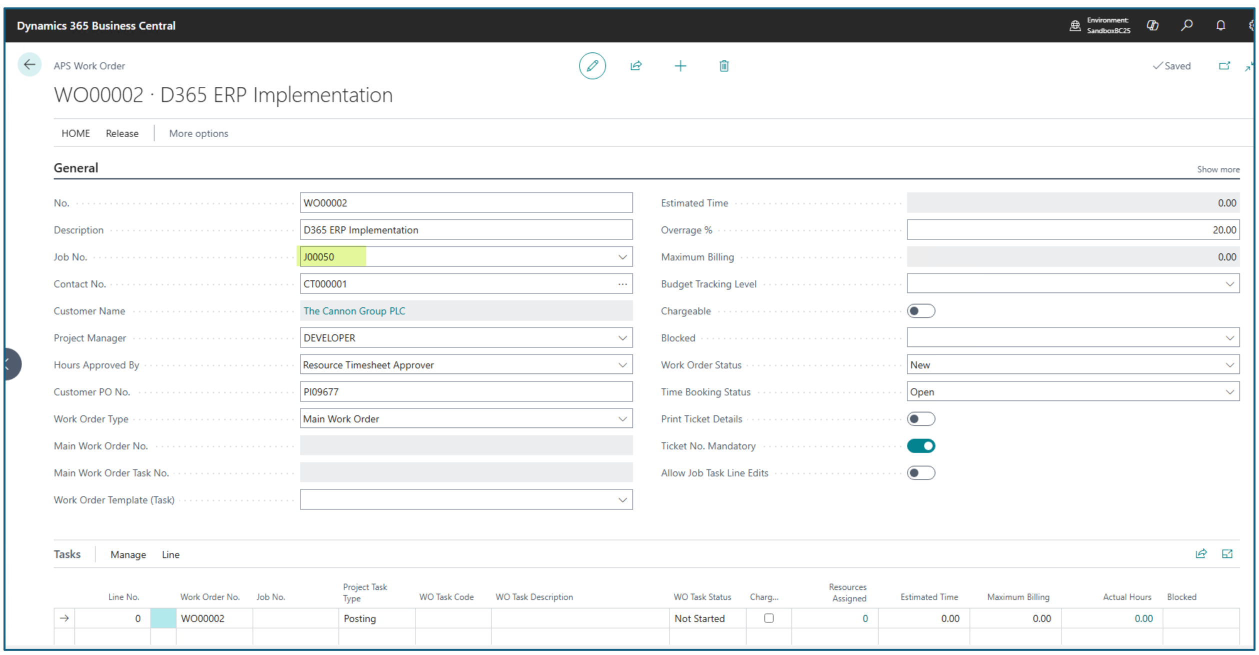
Create a new APS Work Order.



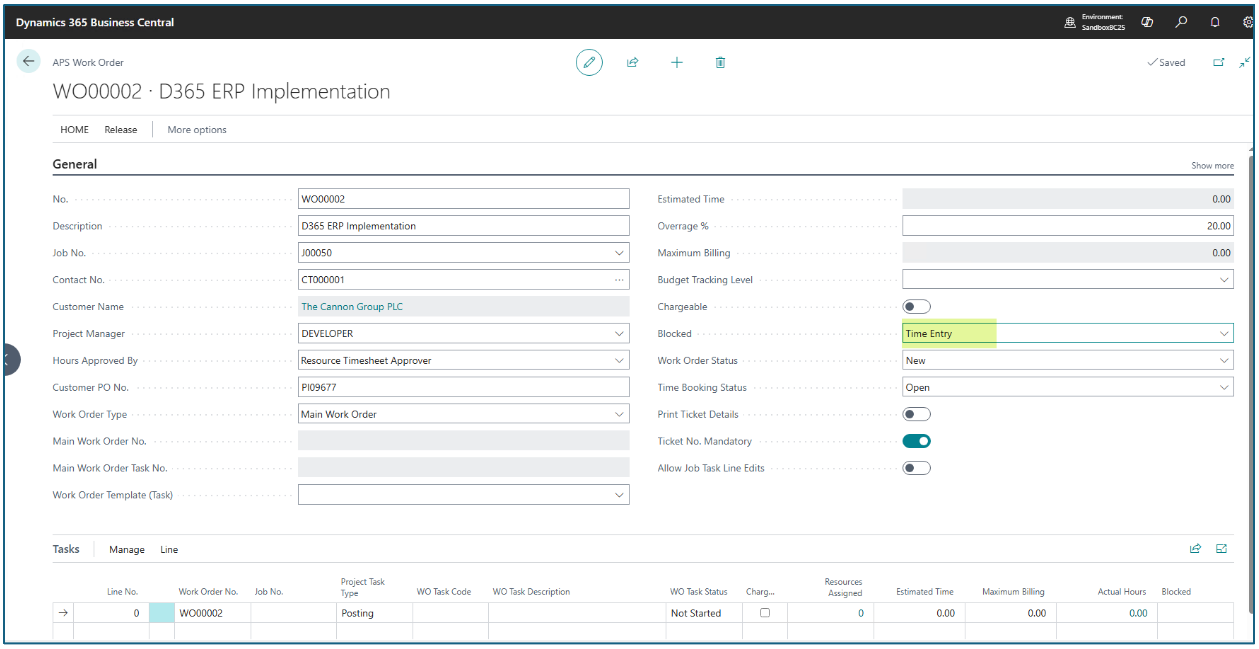


Select the Project created earlier.



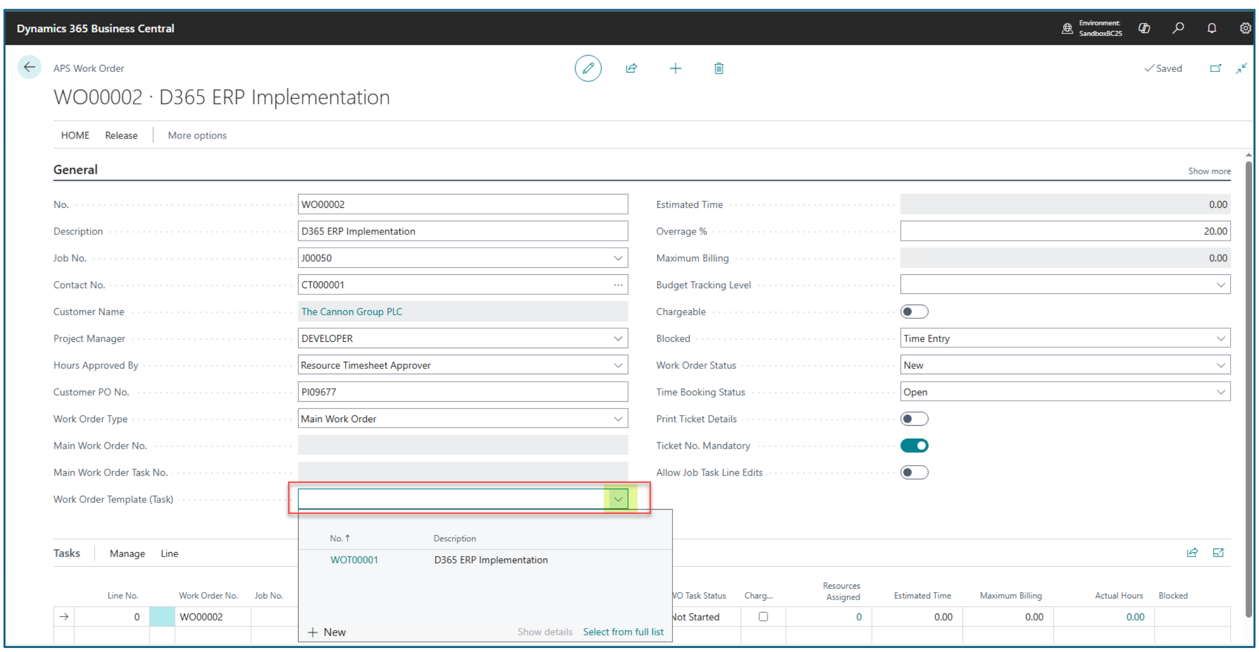


On the “Blocked” field, select “Time Entry”. This will prevent posting of timesheets against the Work Order/Tasks.

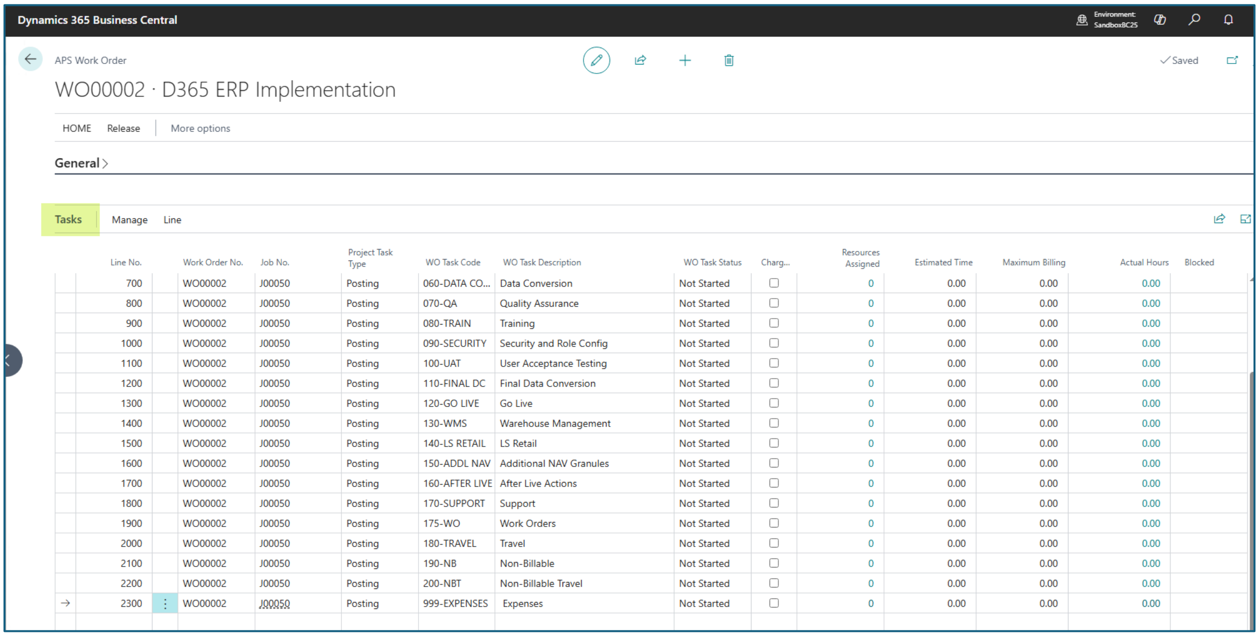


Work Order tasks can be manually entered or automatically by selecting the Work Order Template.

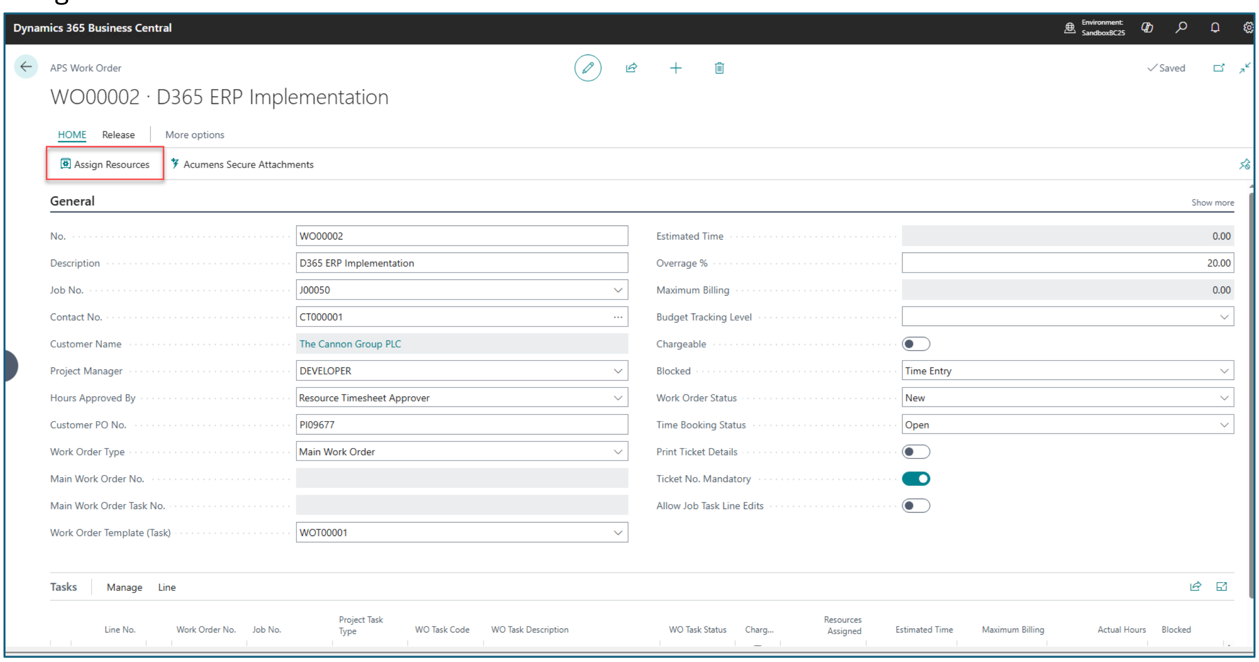
For this case, we select the work order template to populate the work order tasks.

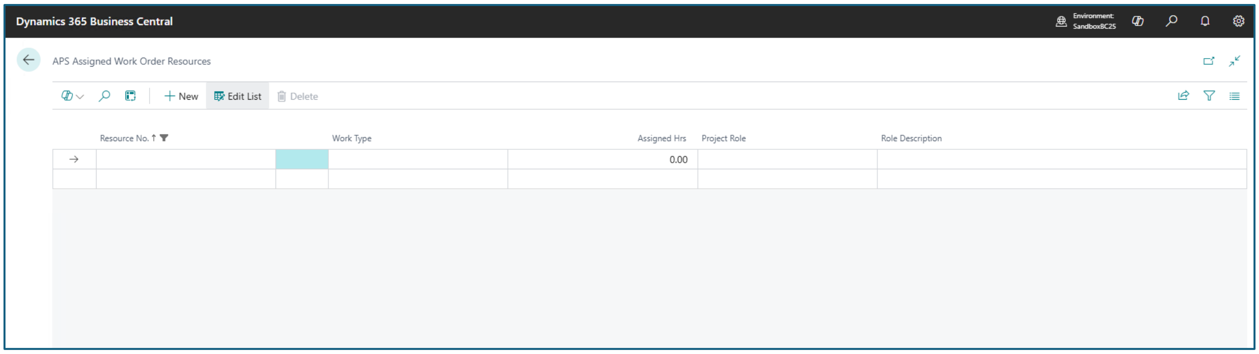


Work Order Tasks are populated from the template. Add or remove the lines as required.

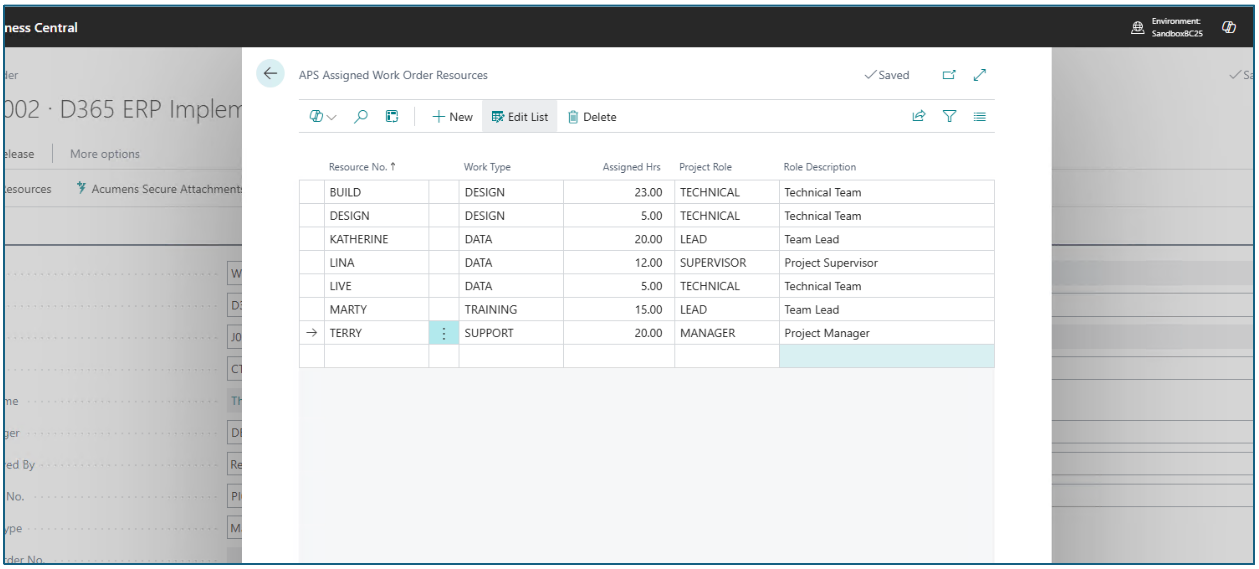


Assign resources to the work Order.

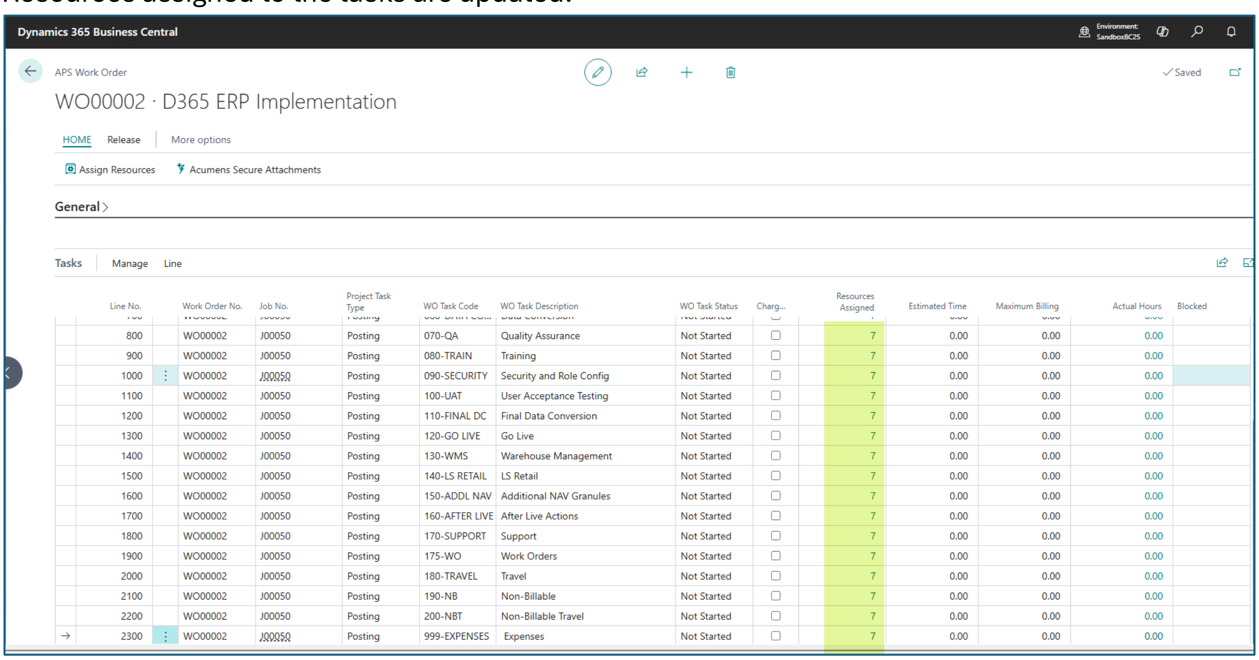




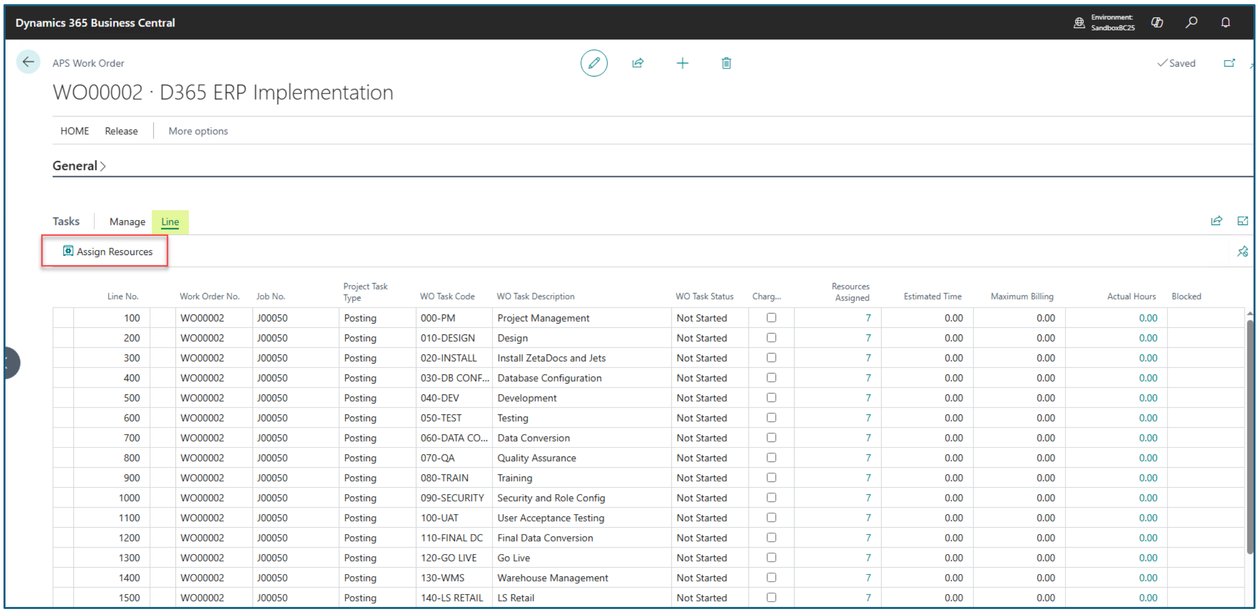
Select the resource assigned to the project and their roles.



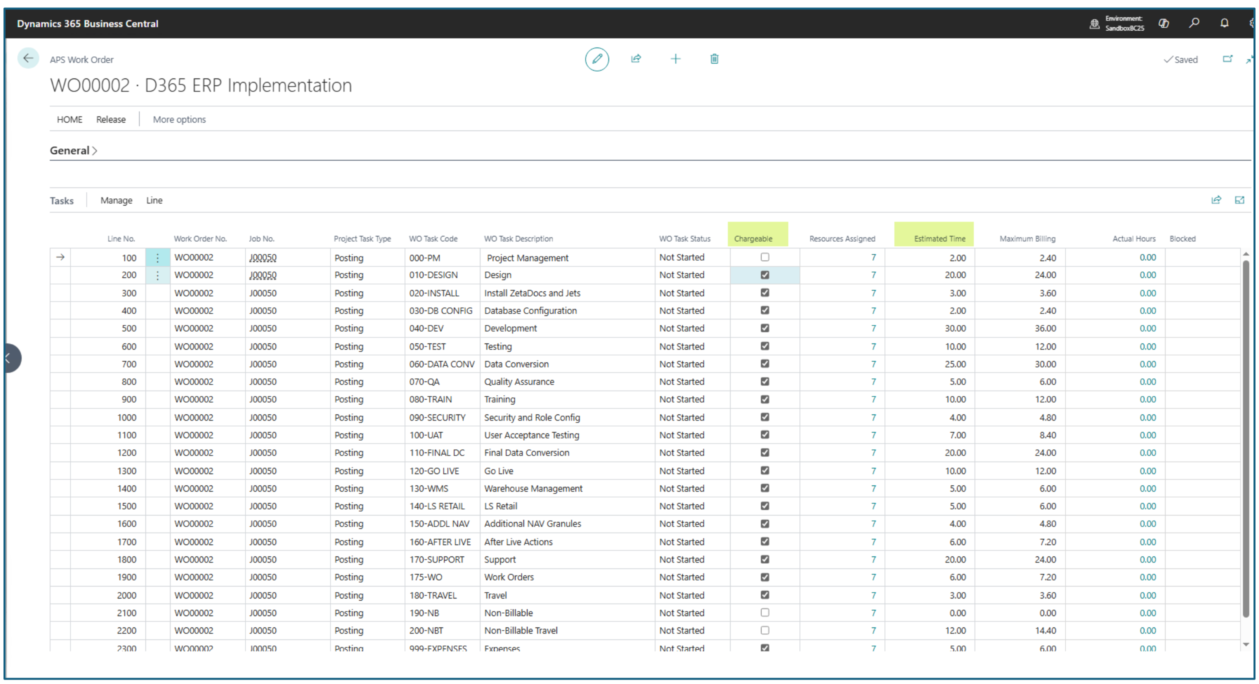
Resources assigned to the tasks are updated.

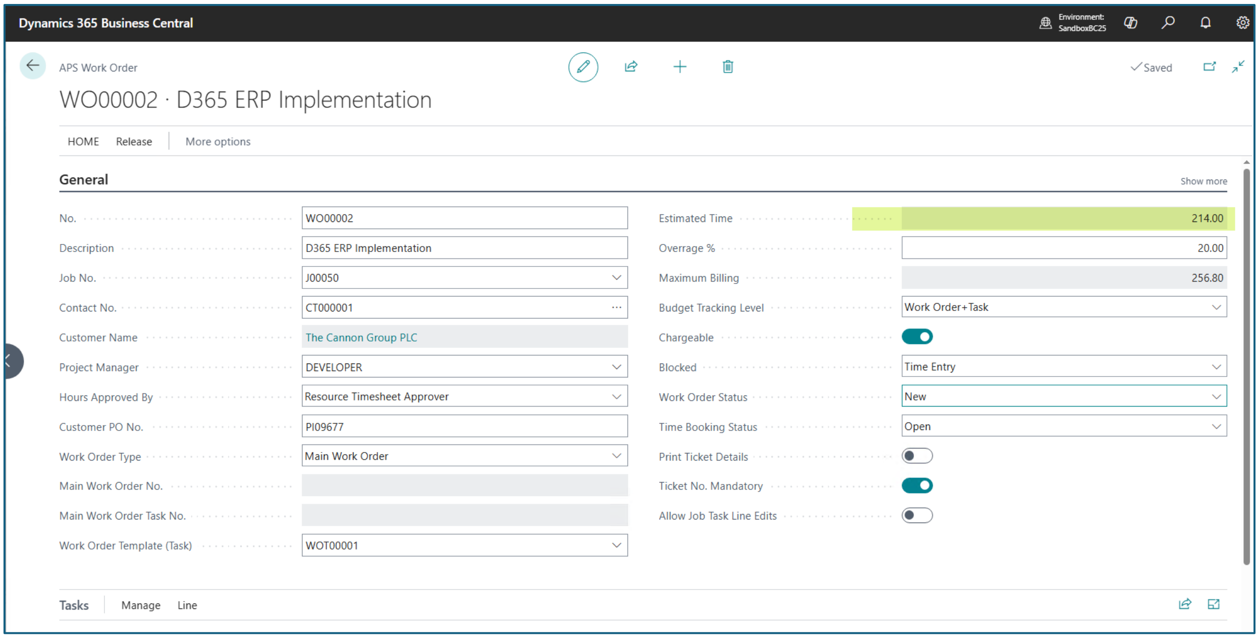


You can also assign a resource to the individual Task.



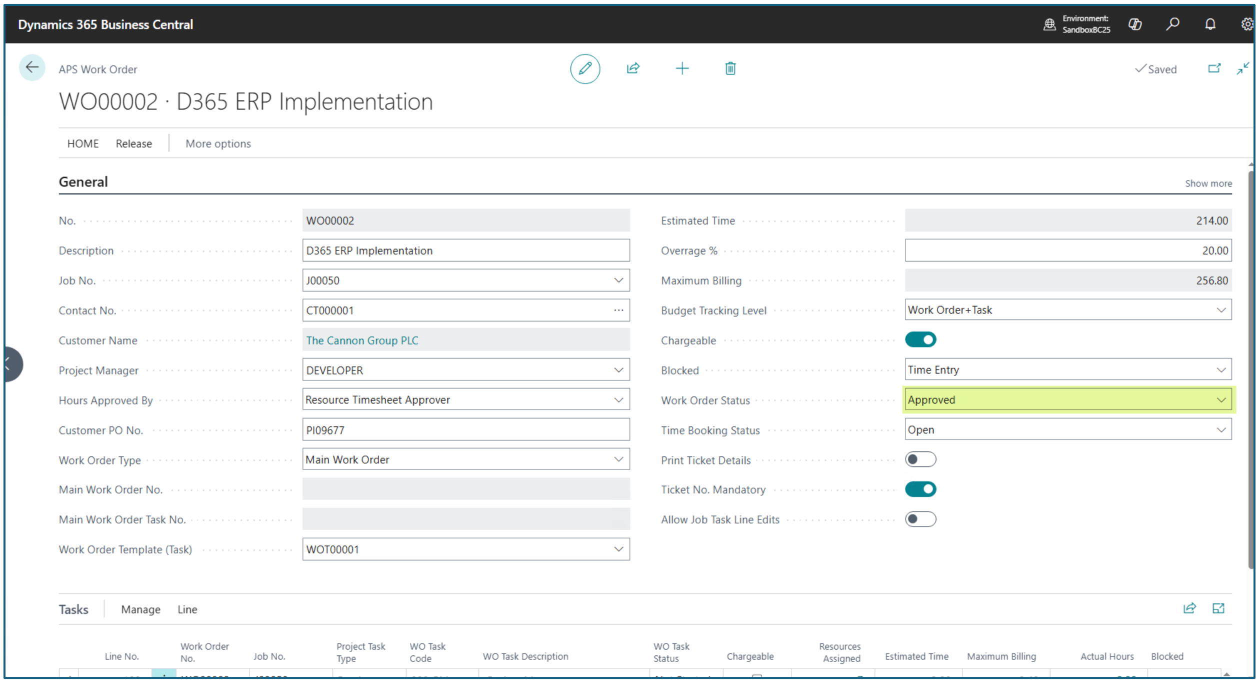
Enter the estimated Hours for each task. Chargeable column indicates if a task will be billable or not.




Dynamics 365 Business Central
APS Work Order
WO00002 · D365 ERP Implementation
HOME
Release
More options
General
Show more
No.
WO00002
Description
D365 ERP Implementation
Job No.
J00050
Contact No.
CT000001
Customer Name
The Cannon Group PLC
Project Manager
DEVELOPER
Hours Approved By
Resource Timesheet Approver
Customer PO No.
PI09677
Work Order Type
Main Work Order
Main Work Order No.
Main Work Order Task No.
Work Order Template (Task)
WOT00001
Estimated Time
214.00
Overage %
20.00
Maximum Billing
256.80
Budget Tracking Level
Work Order+Task
Chargeable
Blocked
Time Entry
Work Order Status
New
Time Booking Status
Open
Print Ticket Details
Ticket No. Mandatory
Allow Job Task Line Edits
Tasks
Manage
Line

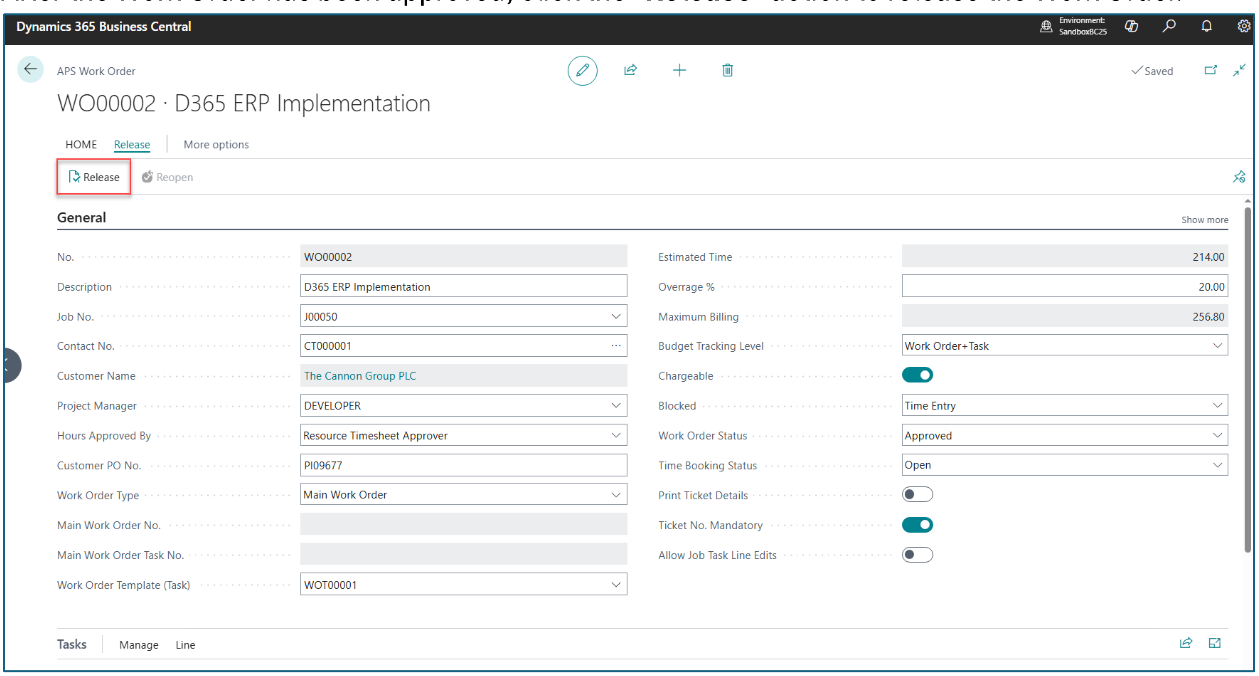
4.2. Work Order Approval Process

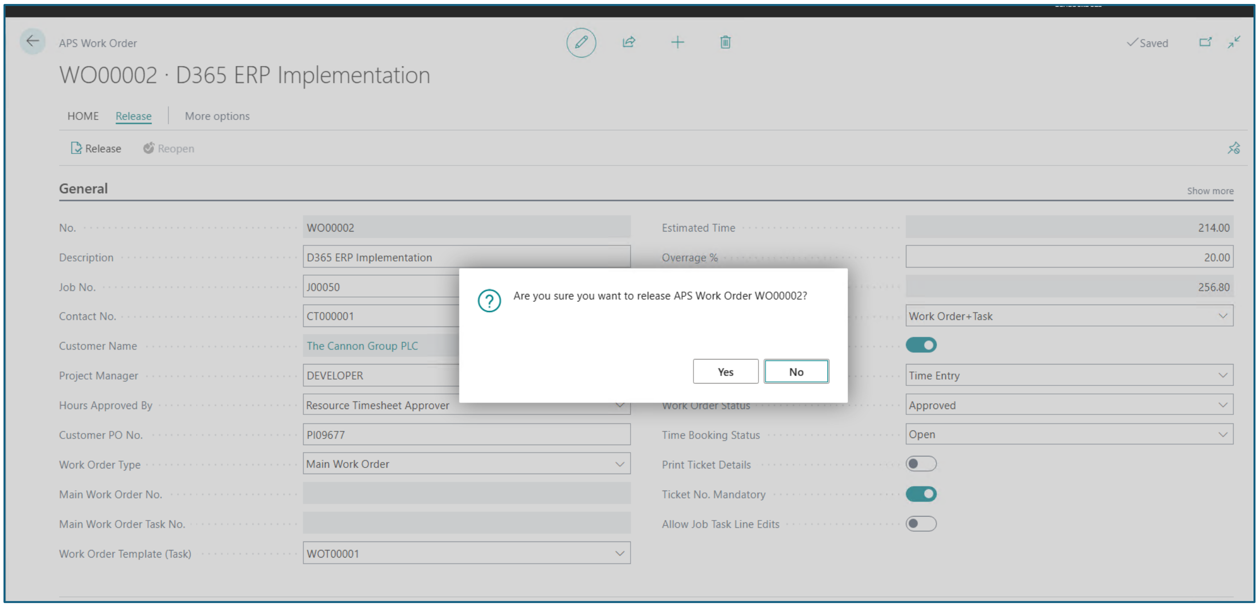
This process is outlined in the DocuSign Approval Process section of the Acumens Professional Service Management user manual.



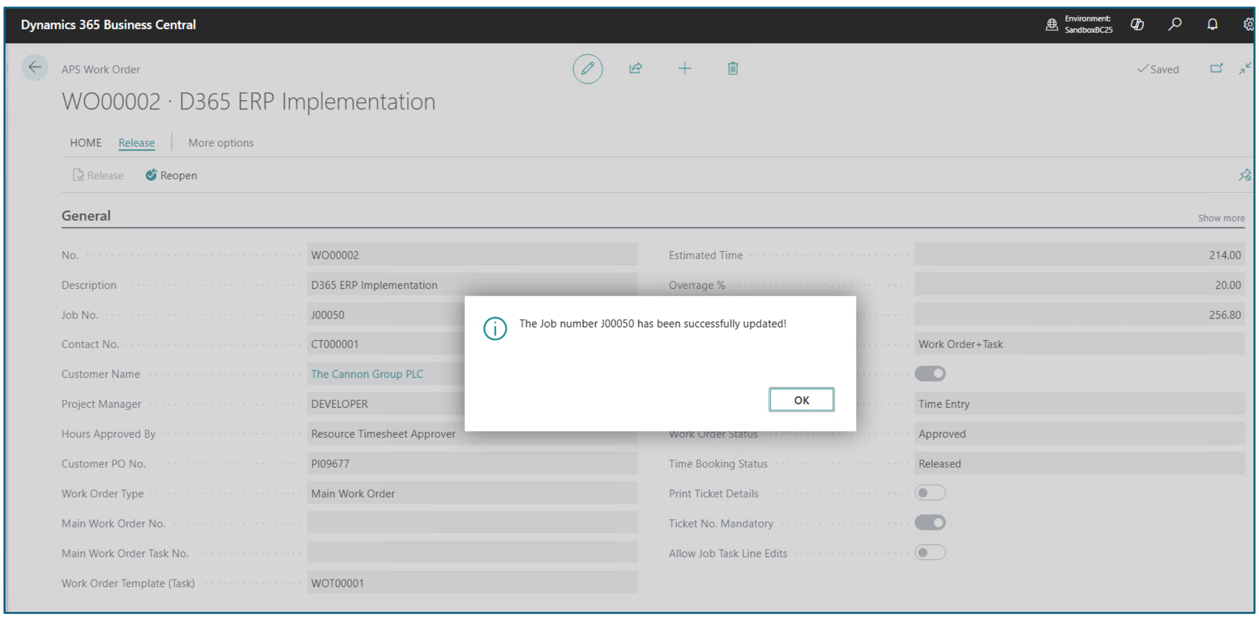
4.3. Release the Work Order.

After the Work Order has been approved, click the "**Release**" action to release the Work Order.

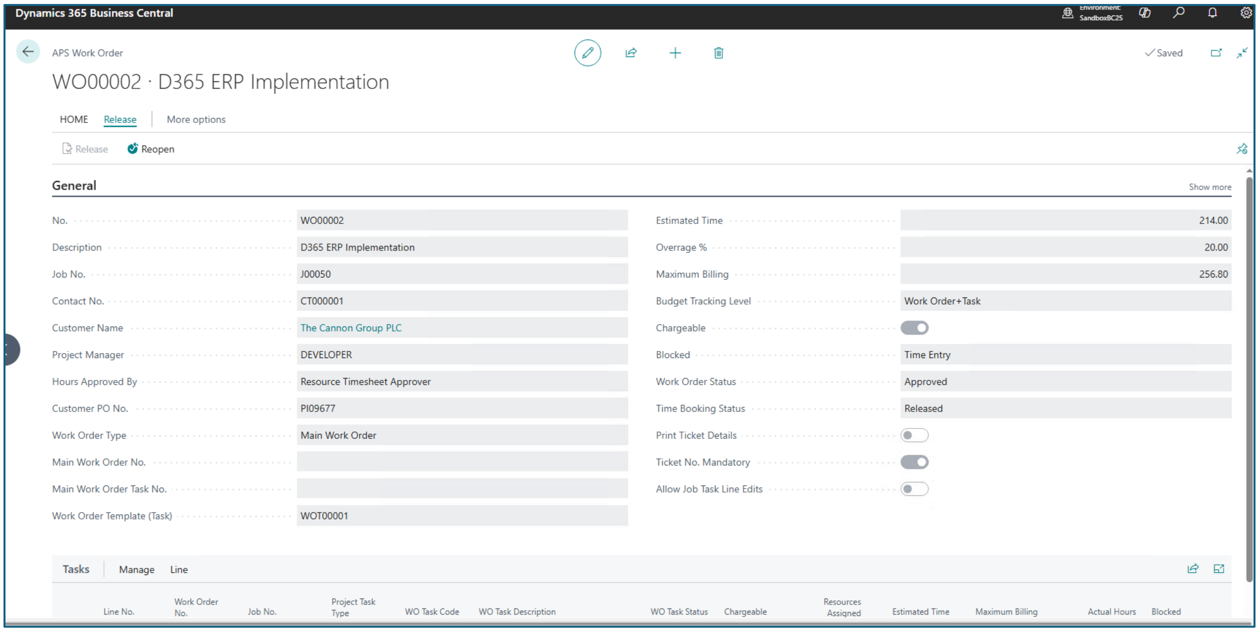




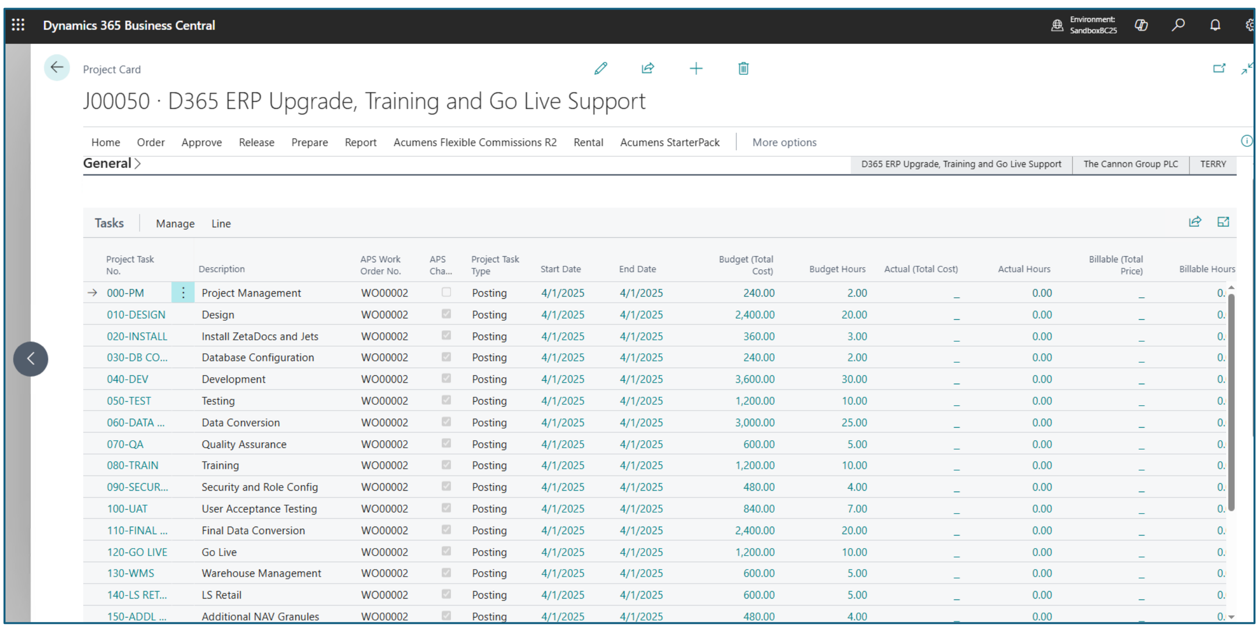
APS Work Order
Saved
WO00002 · D365 ERP Implementation
HOME
Release
More options
Release
Reopen
General
Show more
No.
WO00002
Description
D365 ERP Implementation
Job No.
J00050
Contact No.
CT000001
Customer Name
The Cannon Group PLC
Project Manager
DEVELOPER
Hours Approved By
Resource Timesheet Approver
Customer PO No.
PI09677
Work Order Type
Main Work Order
Main Work Order No.
Main Work Order Task No.
Work Order Template (Task)
WOT00001
Estimated Time
214.00
Overrage %
20.00
256.80
Work Order+Task
Time Entry
Work Order Status
Approved
Time Booking Status
Open
Print Ticket Details
Ticket No. Mandatory
Allow Job Task Line Edits
Are you sure you want to release APS Work Order WO00002?
Yes
No



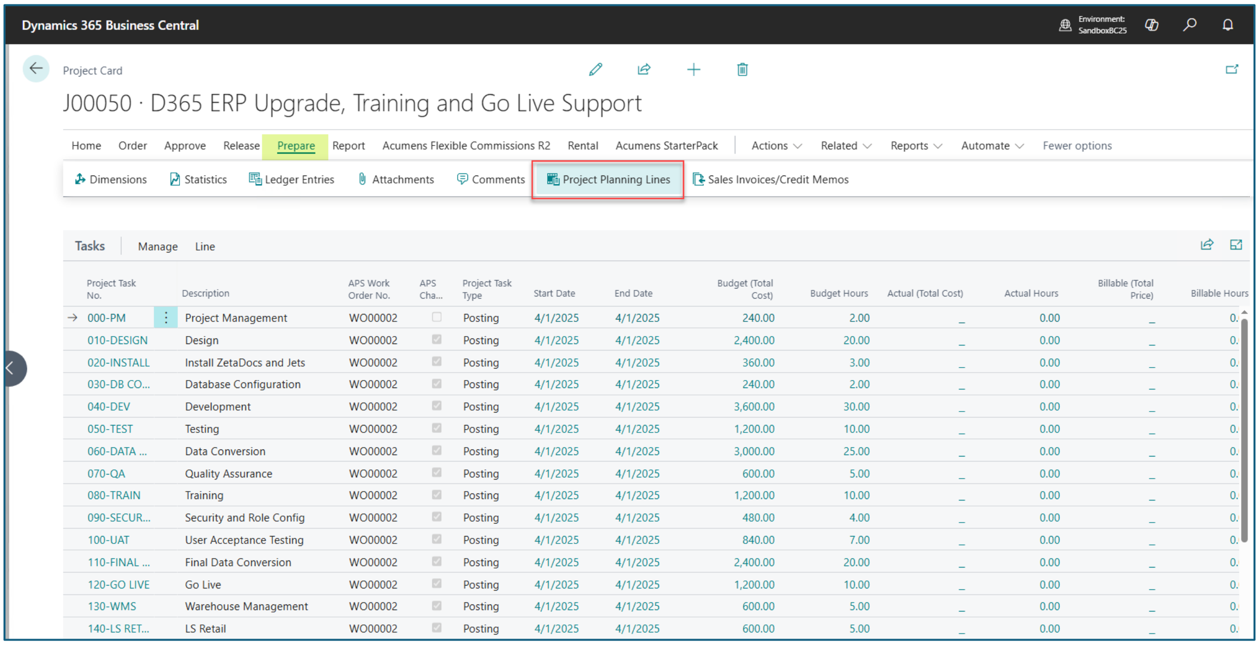
Dynamics 365 Business Central
Environment: SandboxBC25
APS Work Order
Saved
WO00002 · D365 ERP Implementation
HOME
Release
More options
Release
Reopen
General
Show more
No.
WO00002
Description
D365 ERP Implementation
Job No.
J00050
Contact No.
CT000001
Customer Name
The Cannon Group PLC
Project Manager
DEVELOPER
Hours Approved By
Resource Timesheet Approver
Customer PO No.
PI09677
Work Order Type
Main Work Order
Main Work Order No.
Main Work Order Task No.
Work Order Template (Task)
WOT00001
Estimated Time
214.00
Overrage %
20.00
256.80
Work Order+Task
Time Entry
Work Order Status
Approved
Time Booking Status
Released
Print Ticket Details
Ticket No. Mandatory
Allow Job Task Line Edits
The Job number J00050 has been successfully updated!
OK



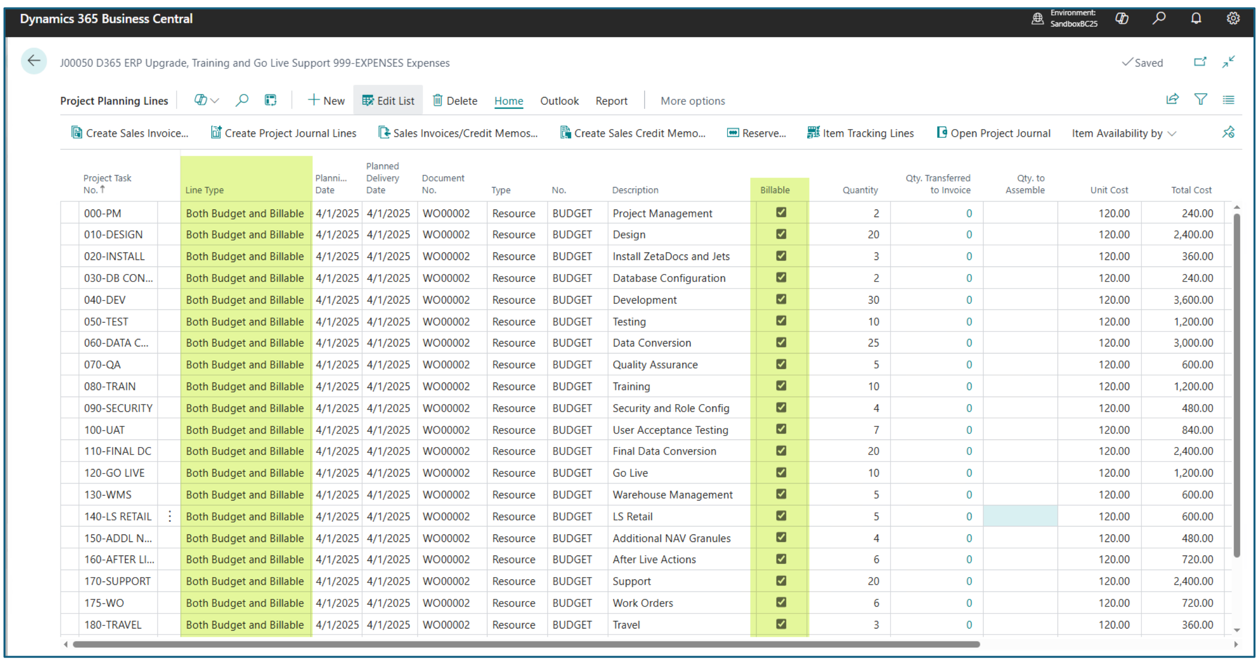
Once released, the Work Order Tasks are populated on the project lines as below.



View and update the actual hours on the project task lines.



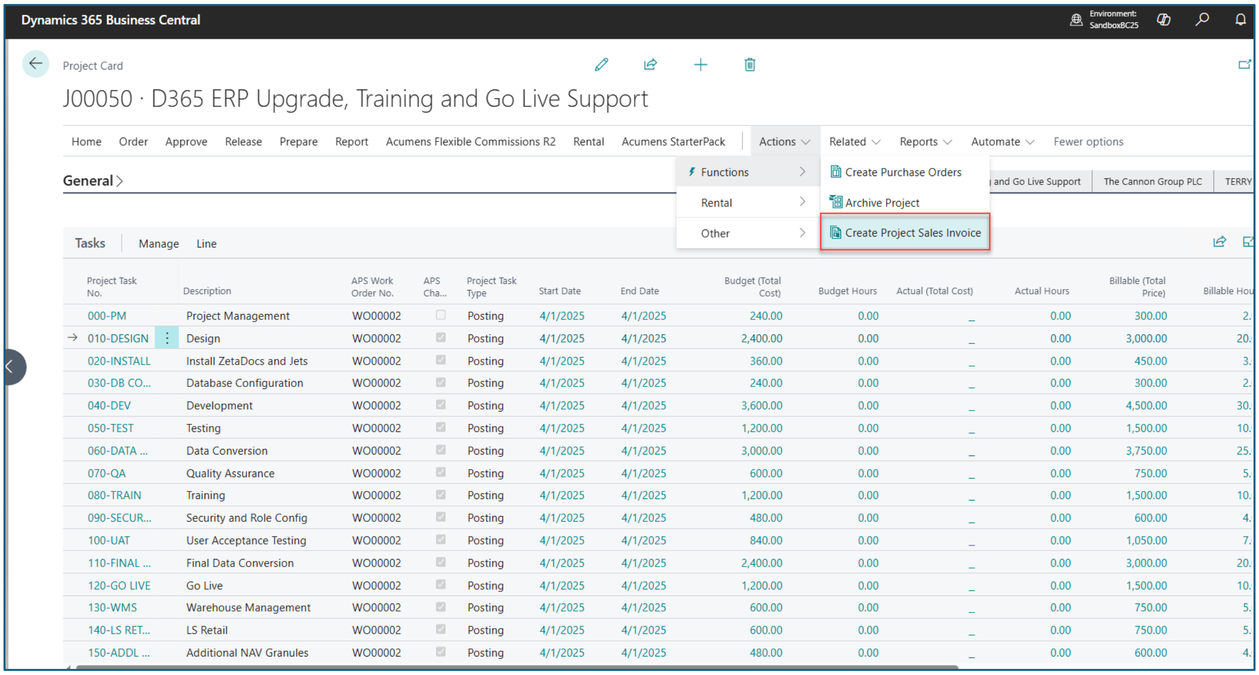
Project Task No.	Description	APS Work Order No.	APS Cha...	Project Task Type	Start Date	End Date	Budget (Total Cost)	Budget Hours	Actual (Total Cost)	Actual Hours	Billable (Total Price)	Billable Hours
000-PM	Project Management	WO00002		Posting	4/1/2025	4/1/2025	240.00	2.00	_	0.00	_	0.
010-DESIGN	Design	WO00002		Posting	4/1/2025	4/1/2025	2,400.00	20.00	_	0.00	_	0.
020-INSTALL	Install ZetaDocs and Jets	WO00002		Posting	4/1/2025	4/1/2025	360.00	3.00	_	0.00	_	0.
030-DB CO...	Database Configuration	WO00002		Posting	4/1/2025	4/1/2025	240.00	2.00	_	0.00	_	0.
040-DEV	Development	WO00002		Posting	4/1/2025	4/1/2025	3,600.00	30.00	_	0.00	_	0.
050-TEST	Testing	WO00002		Posting	4/1/2025	4/1/2025	1,200.00	10.00	_	0.00	_	0.
060-DATA ...	Data Conversion	WO00002		Posting	4/1/2025	4/1/2025	3,000.00	25.00	_	0.00	_	0.
070-QA	Quality Assurance	WO00002		Posting	4/1/2025	4/1/2025	600.00	5.00	_	0.00	_	0.
080-TRAIN	Training	WO00002		Posting	4/1/2025	4/1/2025	1,200.00	10.00	_	0.00	_	0.
090-SECUR...	Security and Role Config	WO00002		Posting	4/1/2025	4/1/2025	480.00	4.00	_	0.00	_	0.
100-UAT	User Acceptance Testing	WO00002		Posting	4/1/2025	4/1/2025	840.00	7.00	_	0.00	_	0.
110-FINAL ...	Final Data Conversion	WO00002		Posting	4/1/2025	4/1/2025	2,400.00	20.00	_	0.00	_	0.
120-GO LIVE	Go Live	WO00002		Posting	4/1/2025	4/1/2025	1,200.00	10.00	_	0.00	_	0.
130-WMS	Warehouse Management	WO00002		Posting	4/1/2025	4/1/2025	600.00	5.00	_	0.00	_	0.
140-LS RET...	LS Retail	WO00002		Posting	4/1/2025	4/1/2025	600.00	5.00	_	0.00	_	0.

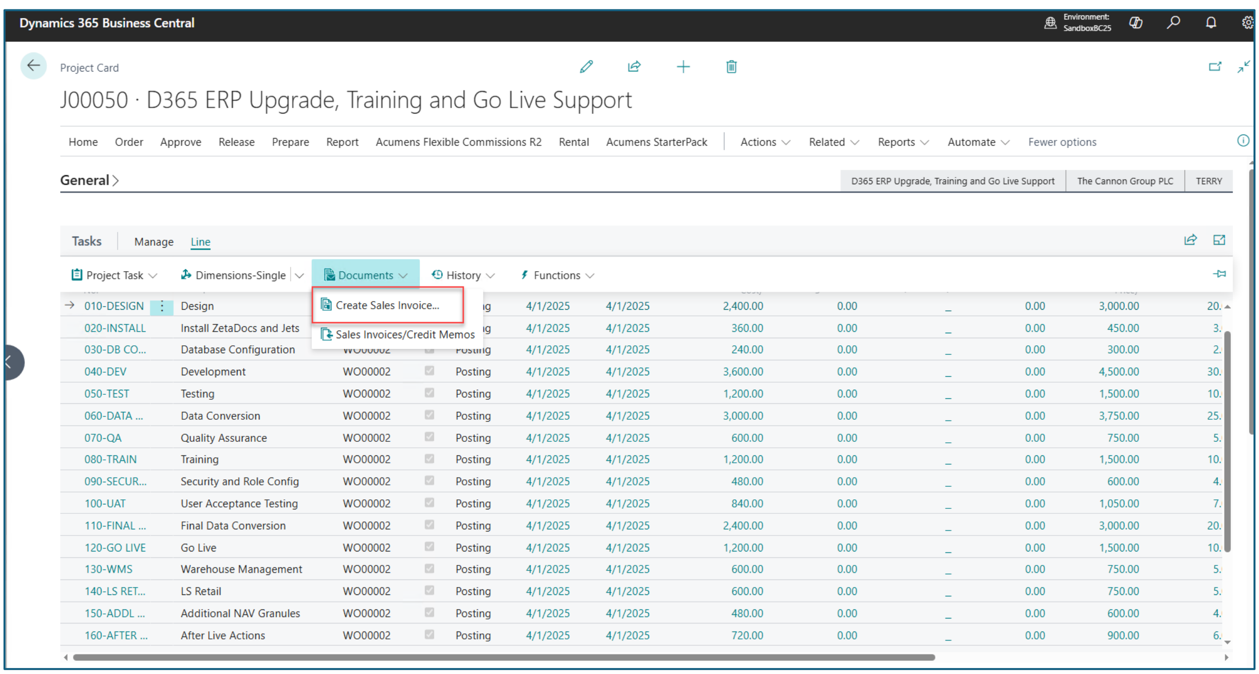


Project Task No.	Line Type	Planni... Date	Planned Delivery Date	Document No.	Type	No.	Description	Billable	Quantity	Qty. Transferred to Invoice	Qty. to Assemble	Unit Cost	Total Cost
000-PM	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Project Management	☑	2	0		120.00	240.00
010-DESIGN	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Design	☑	20	0		120.00	2,400.00
020-INSTALL	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Install ZetaDocs and Jets	☑	3	0		120.00	360.00
030-DB CON...	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Database Configuration	☑	2	0		120.00	240.00
040-DEV	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Development	☑	30	0		120.00	3,600.00
050-TEST	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Testing	☑	10	0		120.00	1,200.00
060-DATA C...	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Data Conversion	☑	25	0		120.00	3,000.00
070-QA	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Quality Assurance	☑	5	0		120.00	600.00
080-TRAIN	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Training	☑	10	0		120.00	1,200.00
090-SECURITY	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Security and Role Config	☑	4	0		120.00	480.00
100-UAT	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	User Acceptance Testing	☑	7	0		120.00	840.00
110-FINAL DC	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Final Data Conversion	☑	20	0		120.00	2,400.00
120-GO LIVE	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Go Live	☑	10	0		120.00	1,200.00
130-WMS	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Warehouse Management	☑	5	0		120.00	600.00
140-LS RETAIL	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	LS Retail	☑	5	0		120.00	600.00
150-ADDL N...	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Additional NAV Granules	☑	4	0		120.00	480.00
160-AFTER LI...	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	After Live Actions	☑	6	0		120.00	720.00
170-SUPPORT	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Support	☑	20	0		120.00	2,400.00
175-WO	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Work Orders	☑	6	0		120.00	720.00
180-TRAVEL	Both Budget and Billable	4/1/2025	4/1/2025	WO00002	Resource	BUDGET	Travel	☑	3	0		120.00	360.00

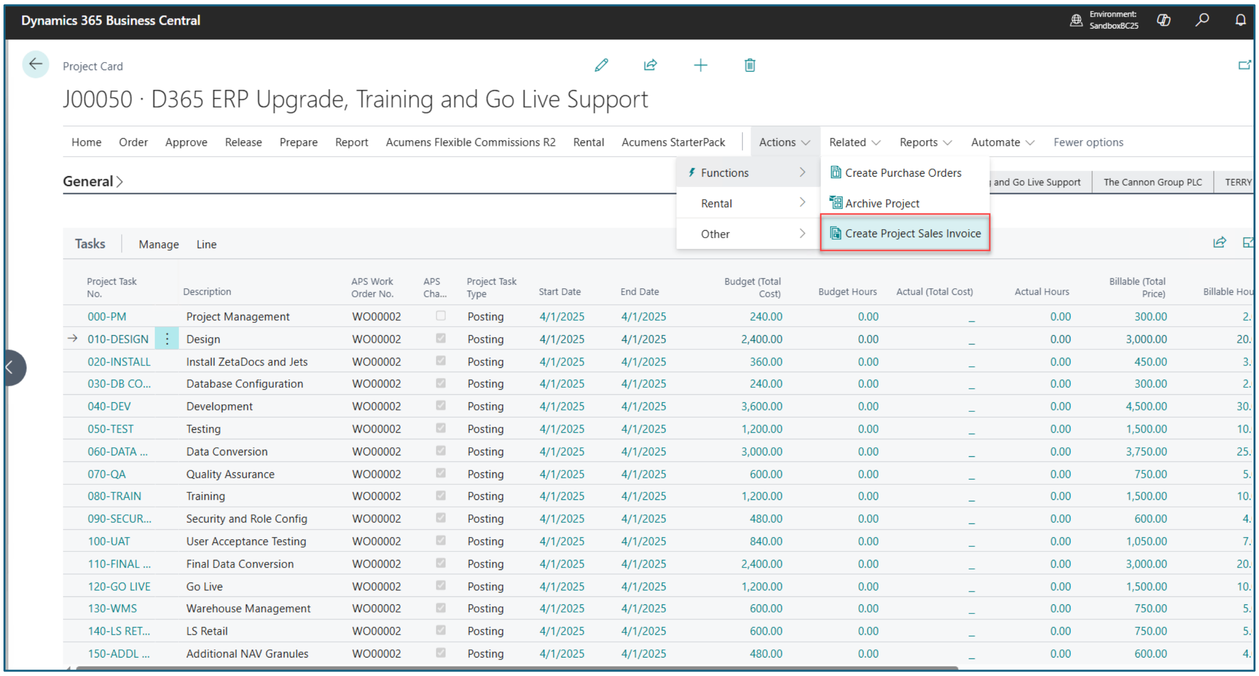
4.4. Create Project Invoice for billing.

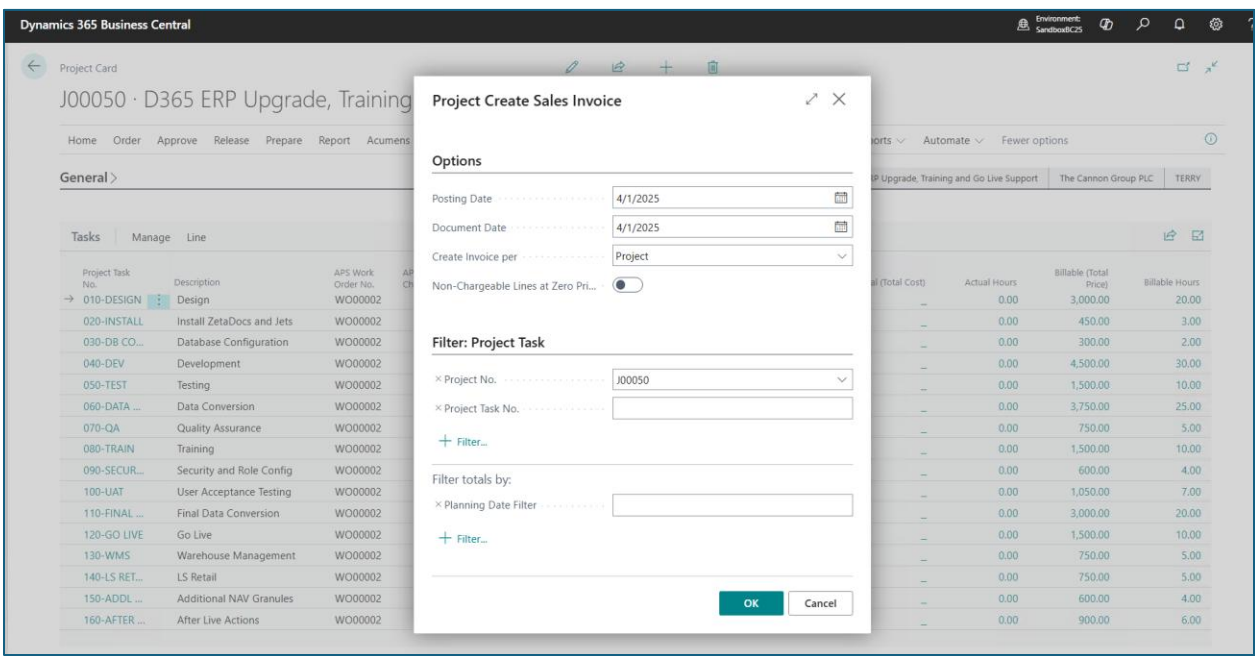
You can create an Invoice for the whole project or for Individual task Lines.



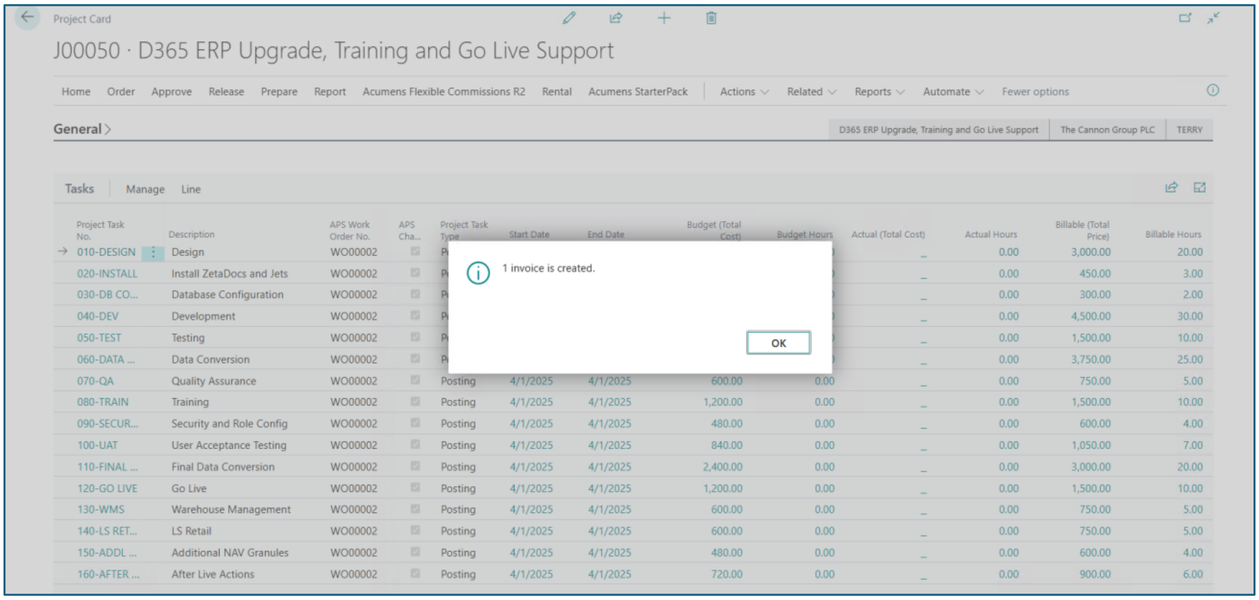


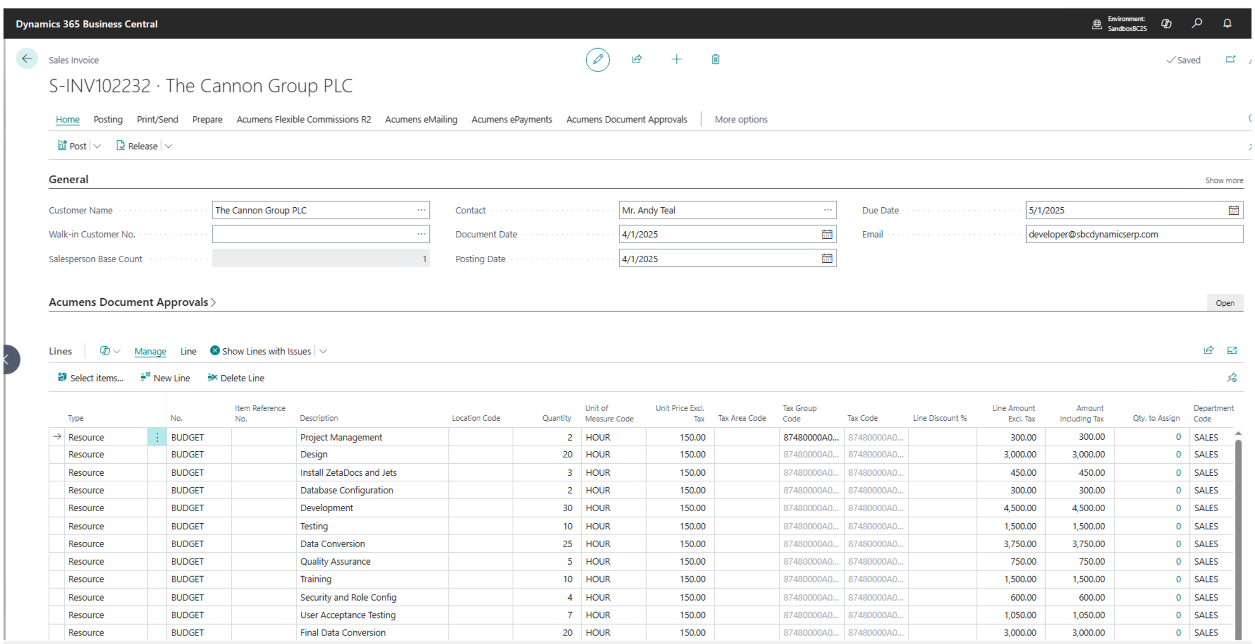
To create an invoice for the project, click "**Create Project Sales Invoice**" to create a sales invoice for the billable total price.





Invoice is created.





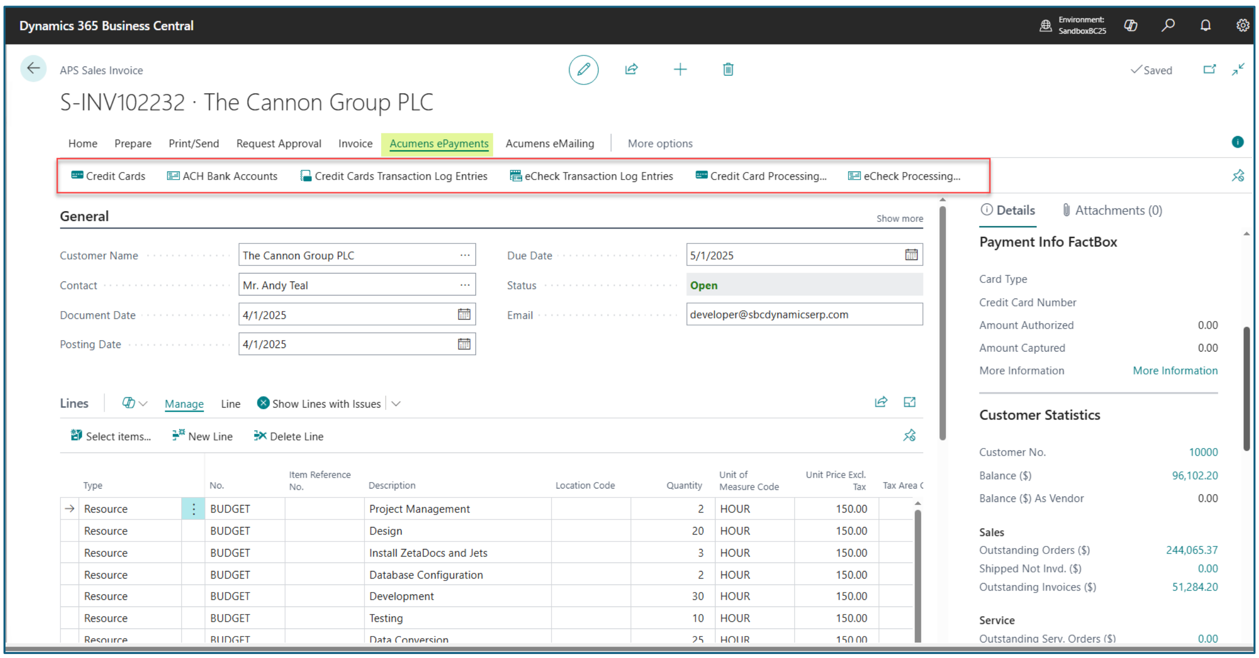
Post the invoice to bill the project.

5. Process Credit Card and ACH payments.

SMFee and APS sales documents supports receiving payments through both Credit Cards and ACH.

These are processed via authorize.Net frameworks.

For SMFee Sales documents and APS Sales Documents, the transactions are performed the same way as standard sales documents.

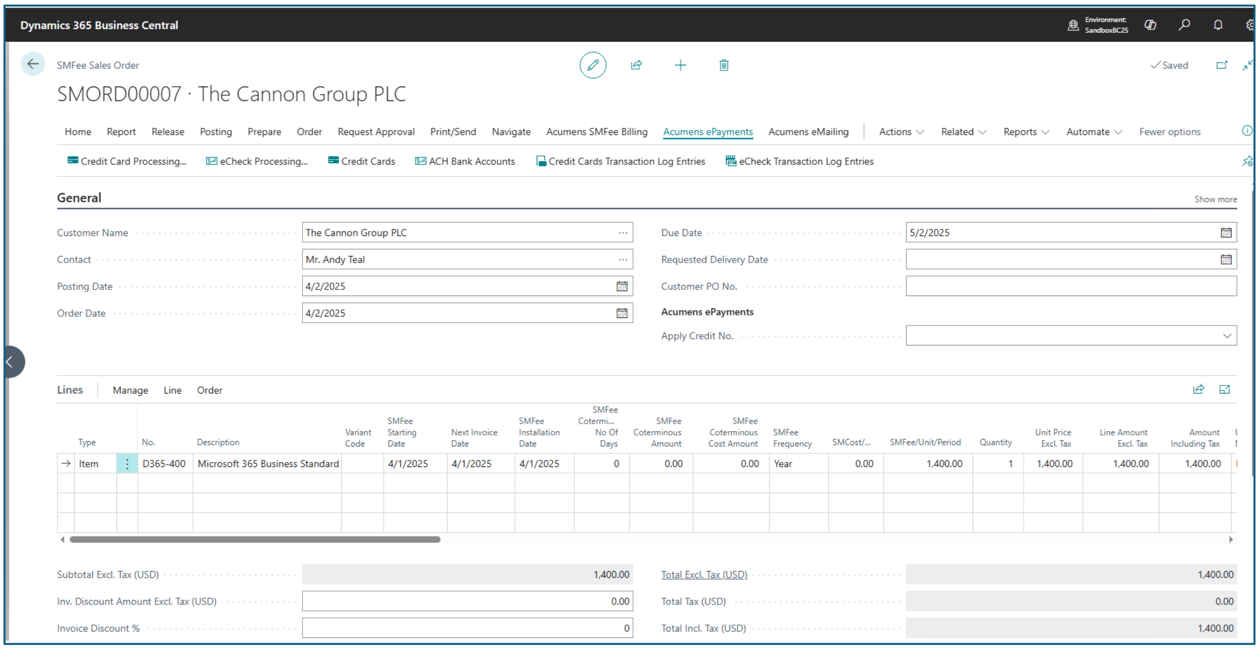


5.1. Credit Card Transaction.

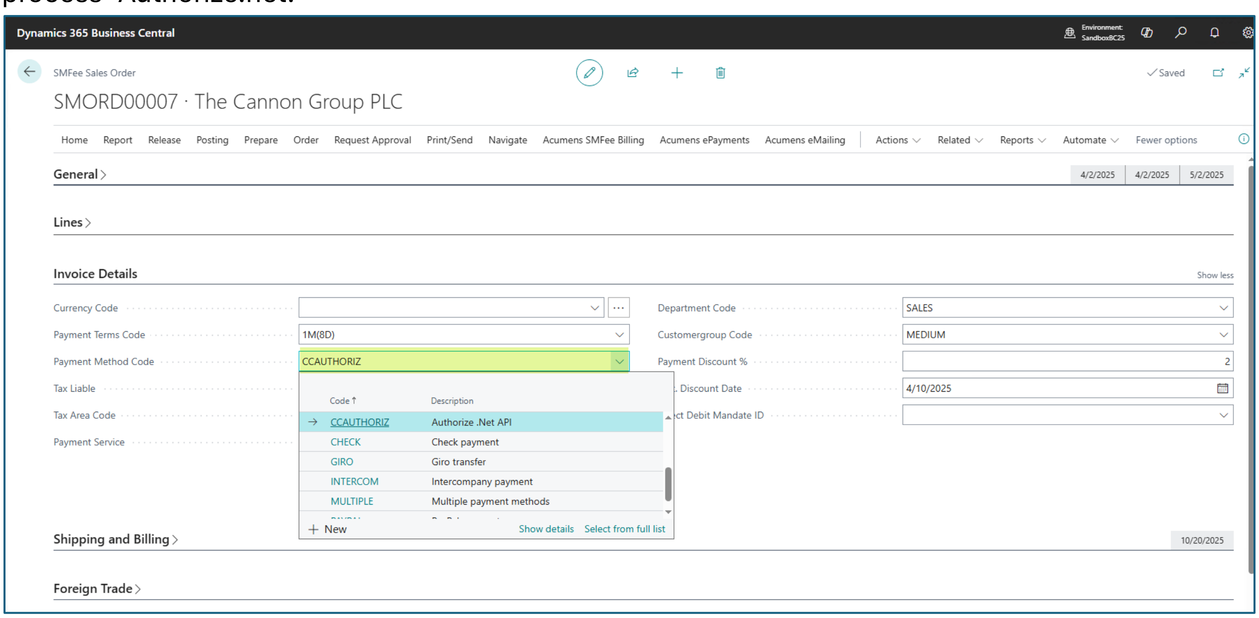
Credit Cards transactions can be performed for SMFee Sales documents and APS Sales documents.

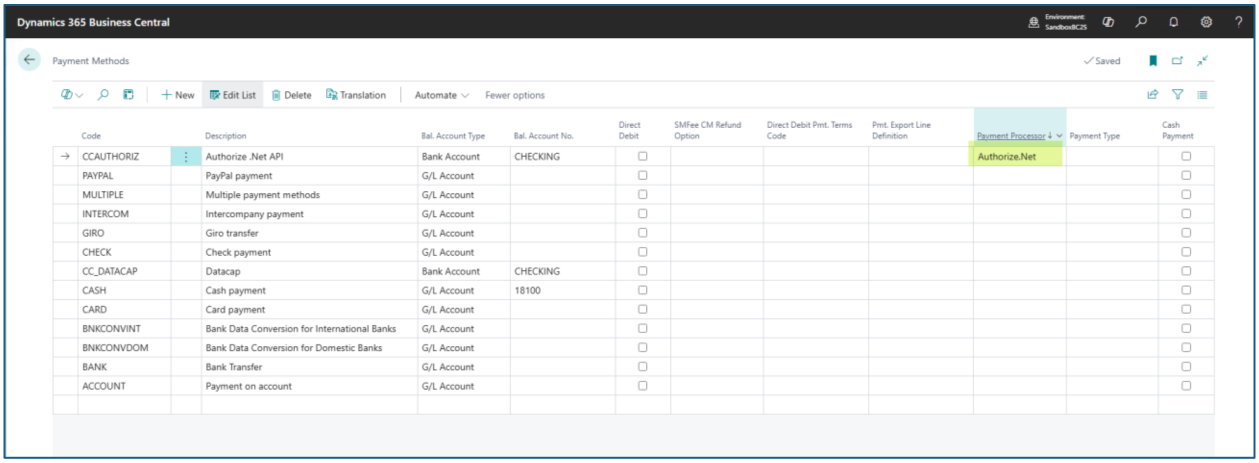
Below is a sample on SMFee Sales Order.

To process a credit card transaction for the document, Open the Order to charge a card for.

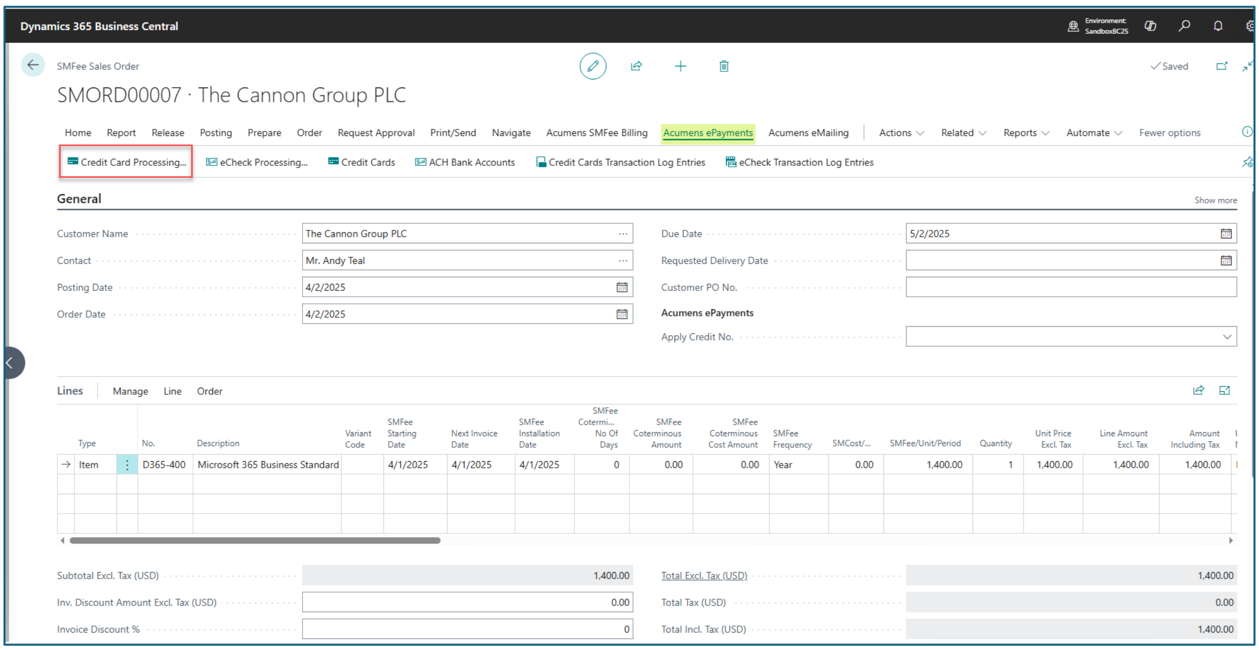


Check the Payment method code and select the payment method code with payment process=Authorize.net.

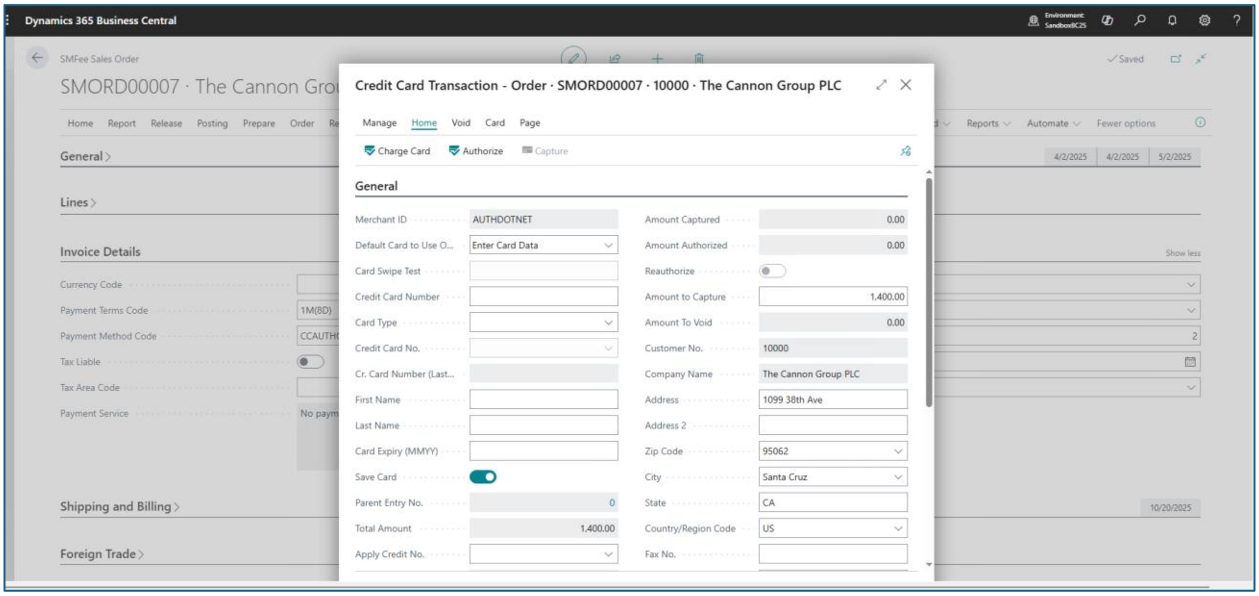




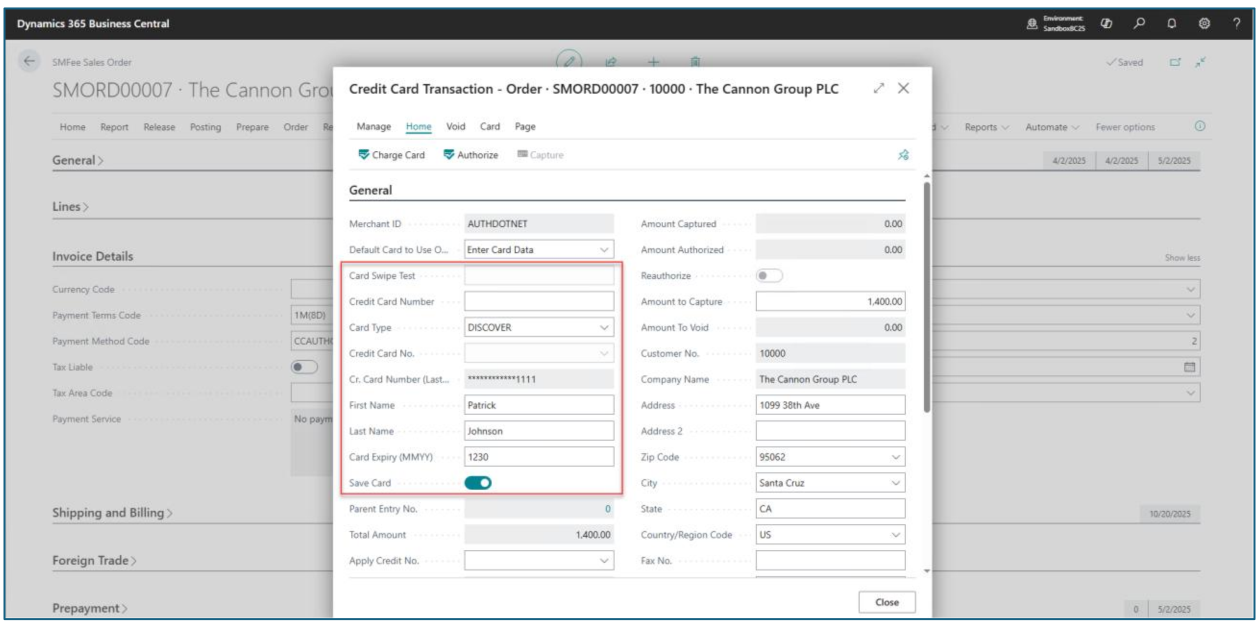
On the action ribbon, go to Acumens ePayments > Credit Card Processing.



Opens the Credit Card Transaction page. The order details are prepopulated.

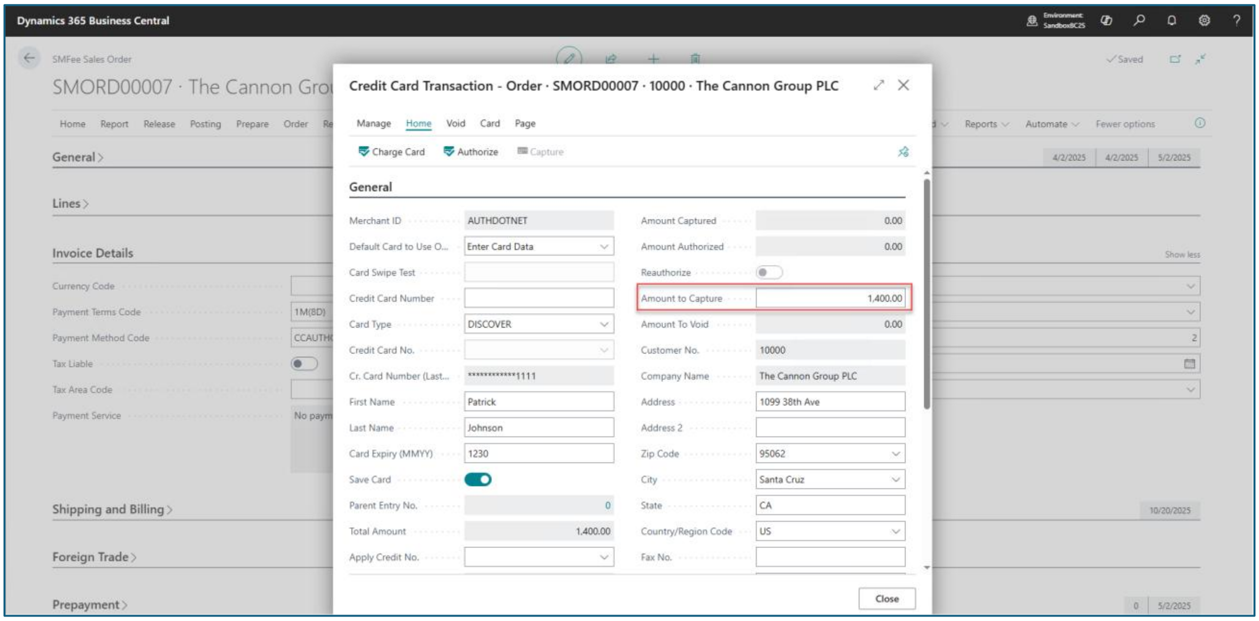


Enter or Select details of the credit card to charge.

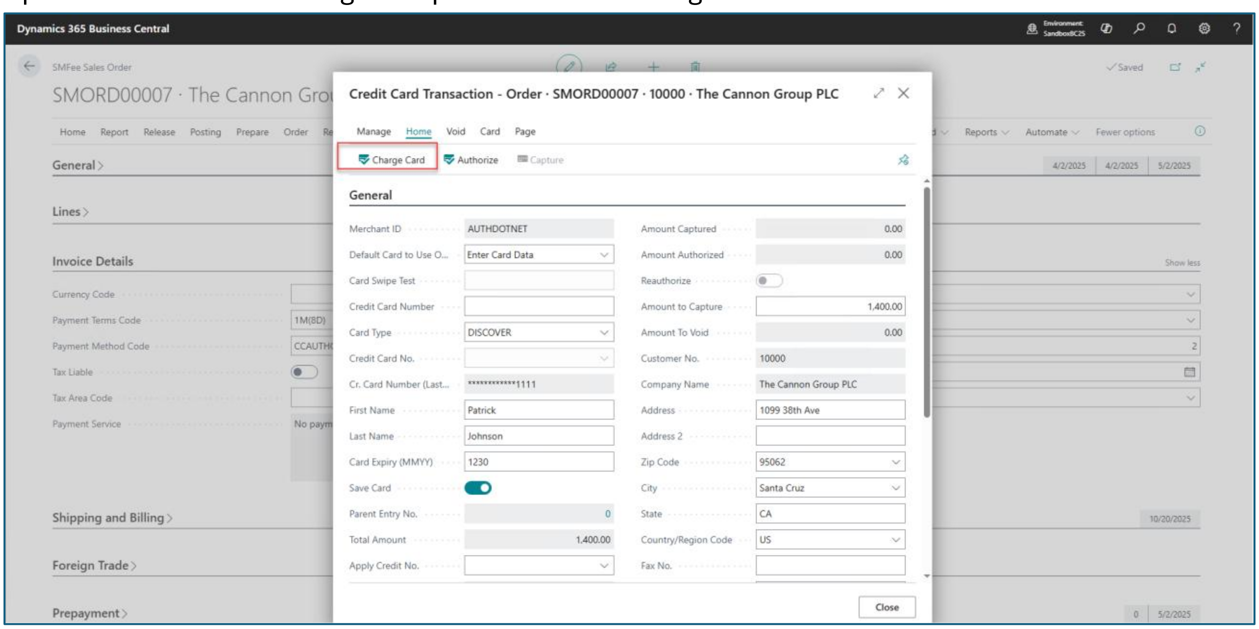


Charge Card.

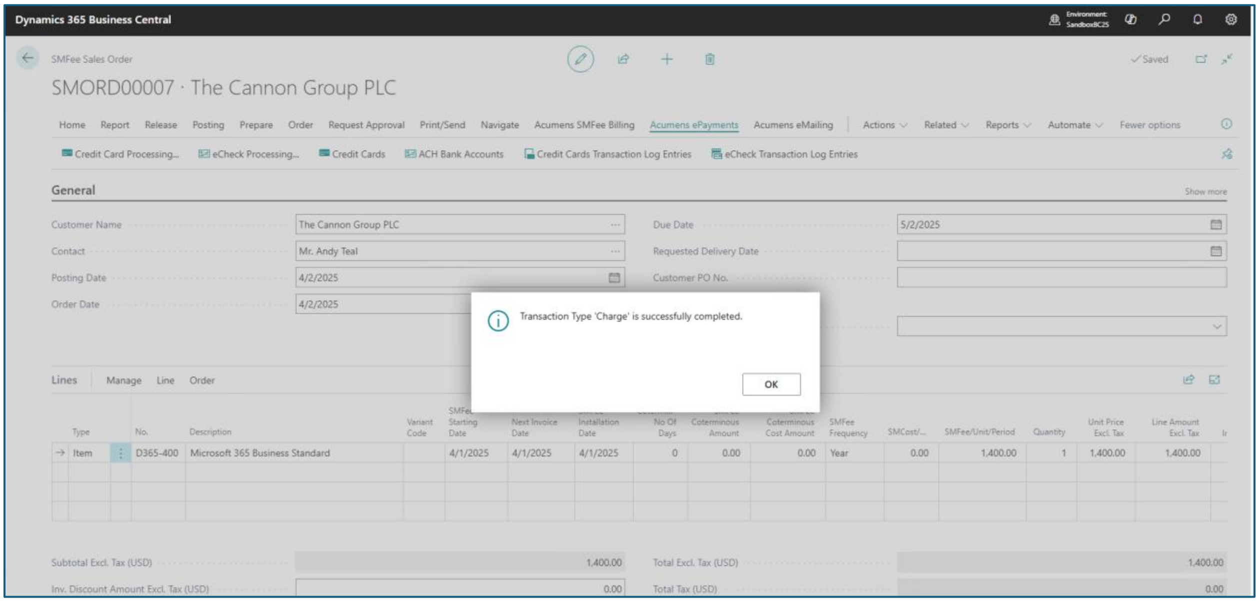
The amount to charge is defaulted to the order amount.



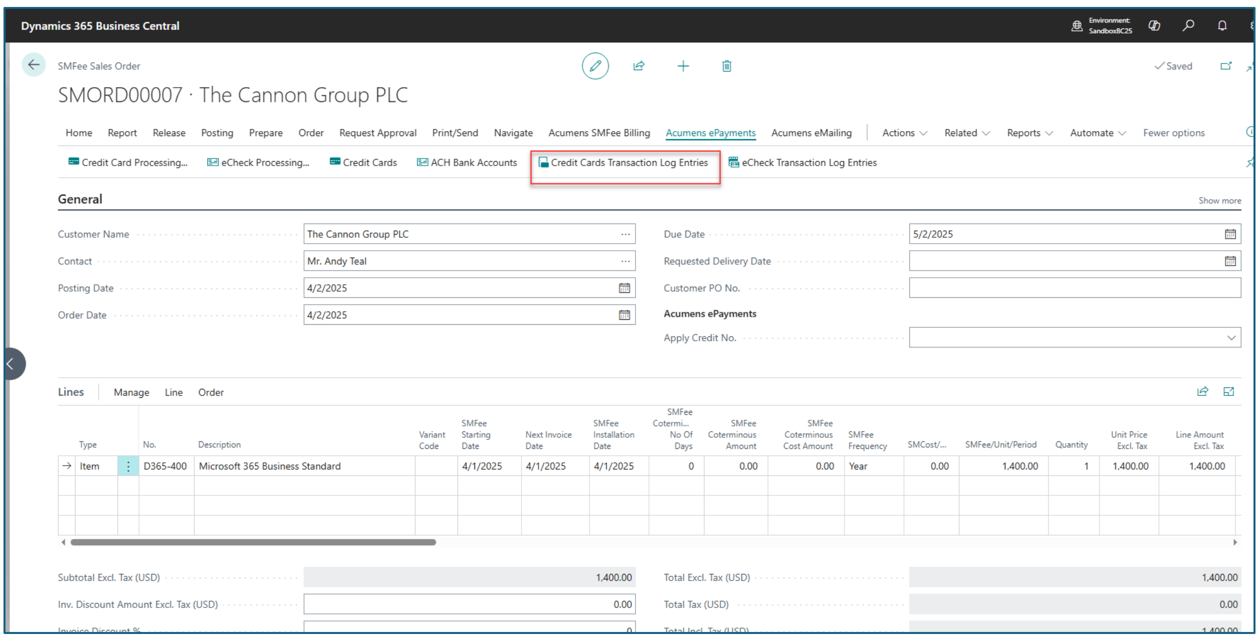
Update the amount to charge if required. Click on Charge Card action.



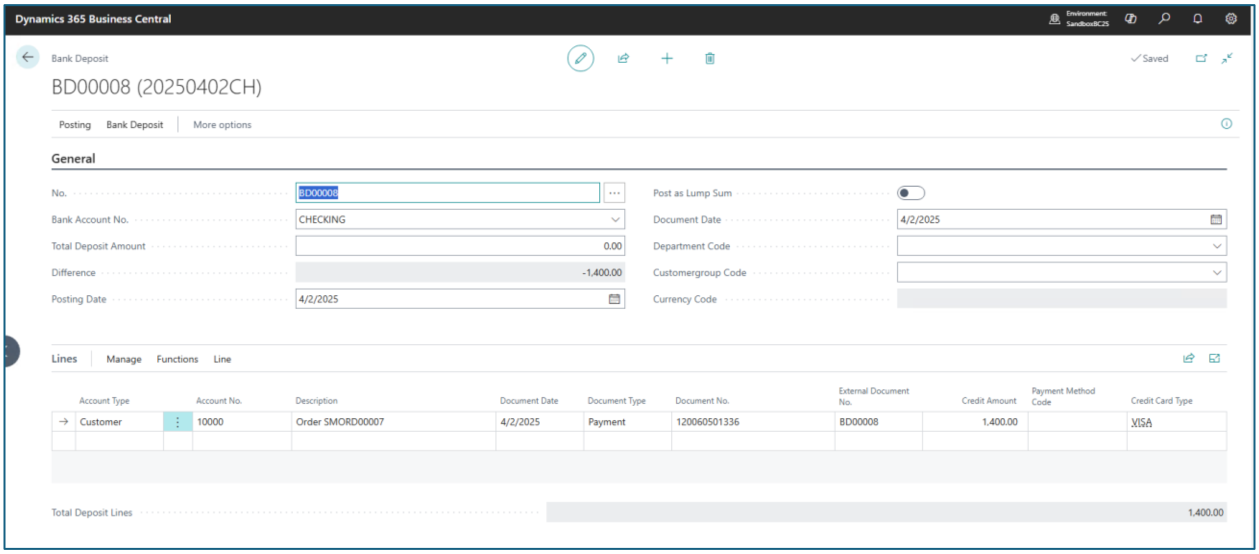
The card is charged.



Review Credit Card Transaction Log entries.

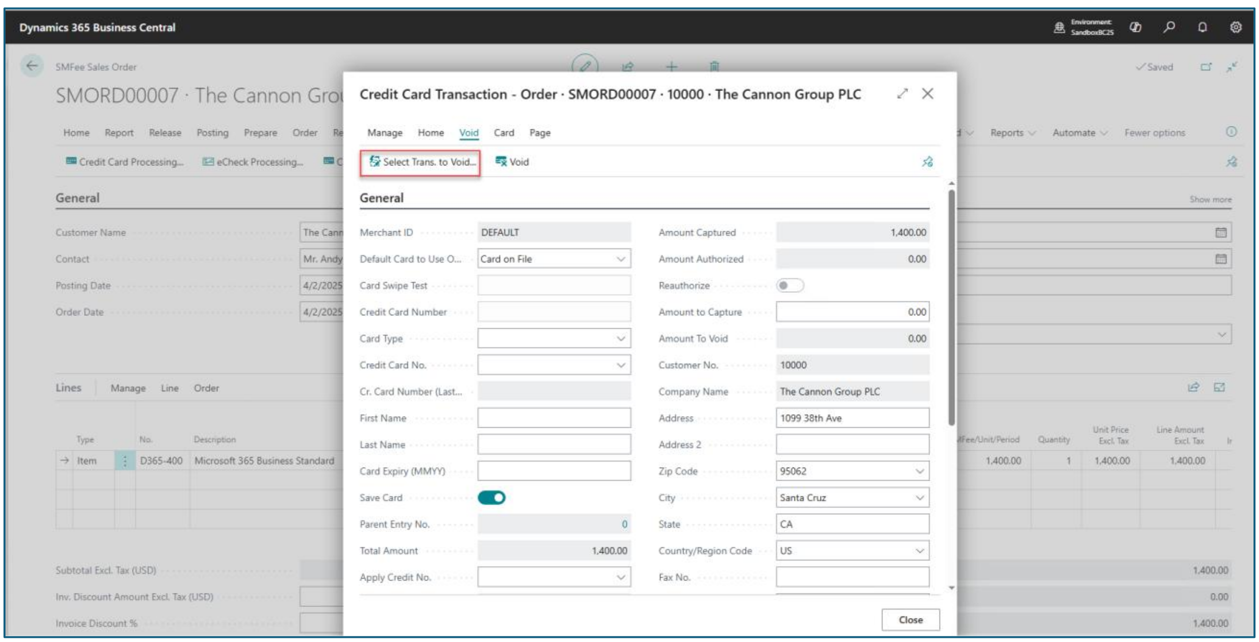


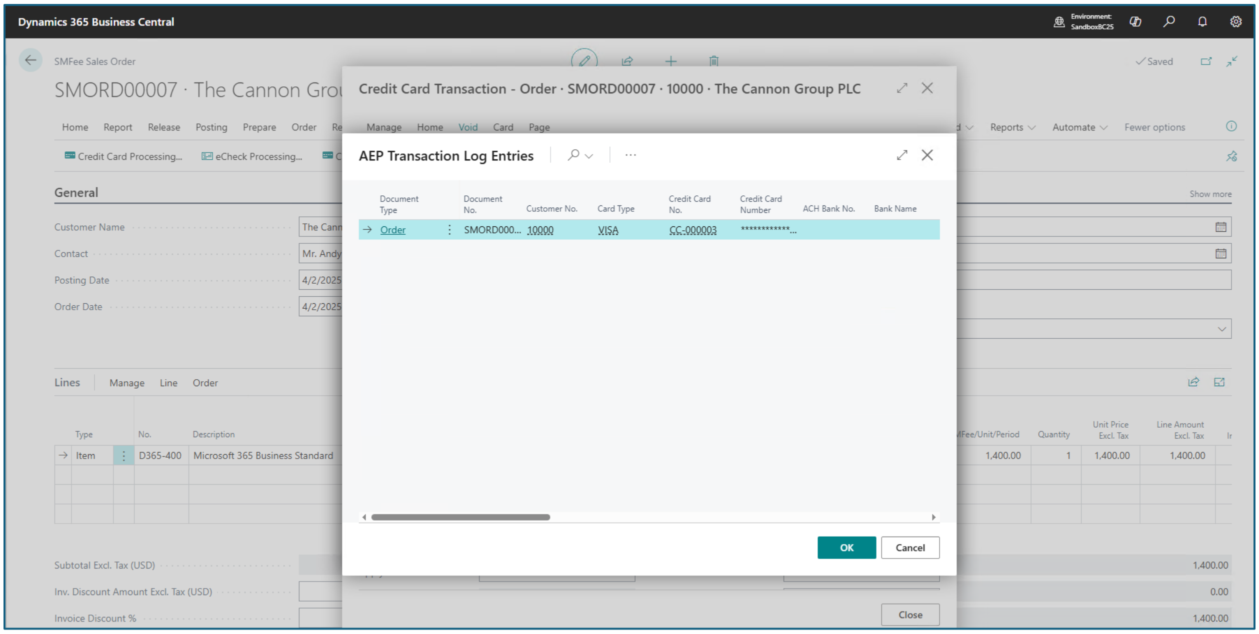
Deposit is created for posting.

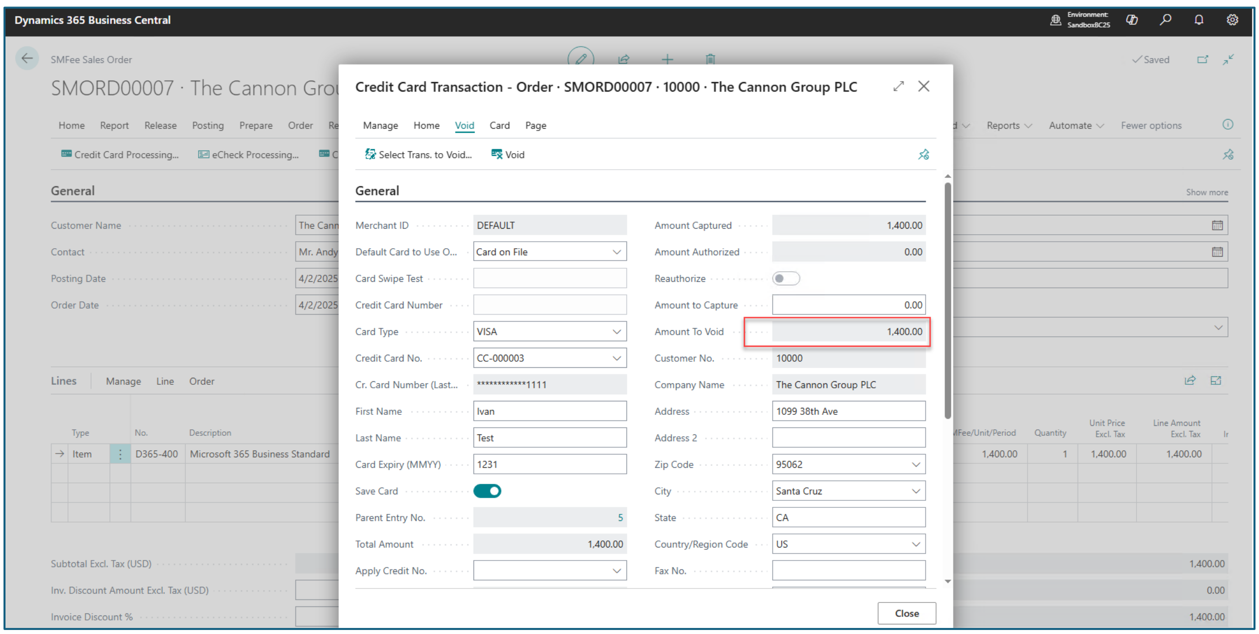


Void a Card Charge.

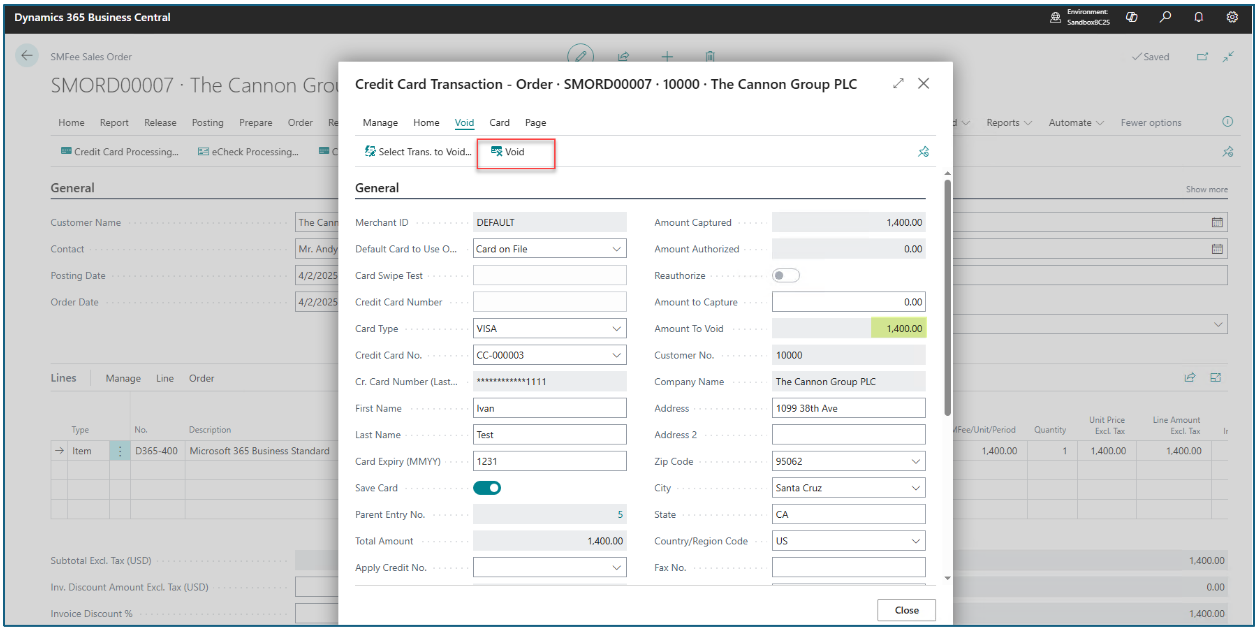
Select Transaction to Void.

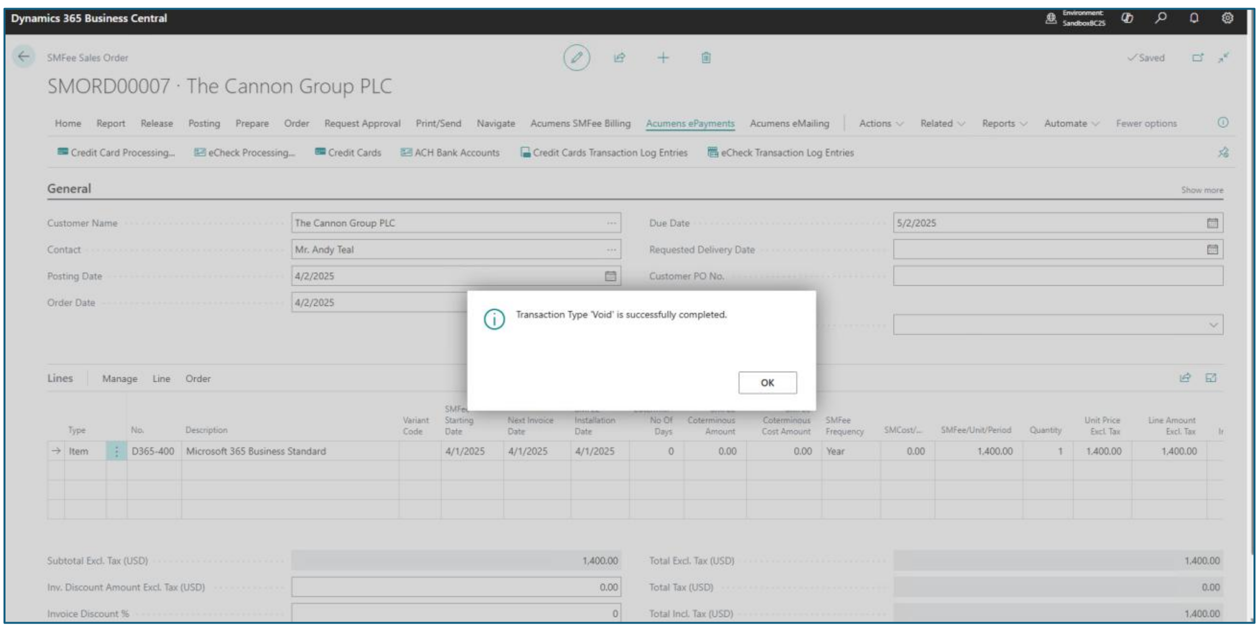



Dynamics 365 Business Central
SMFee Sales Order
SMORD00007 · The Cannon Grou
Credit Card Transaction - Order · SMORD00007 · 10000 · The Cannon Group PLC
AEP Transaction Log Entries
Document Type
Document No.
Customer No.
Card Type
Credit Card No.
Credit Card Number
ACH Bank No.
Bank Name
Order
SMORD000...
10000
VISA
CC-000003
OK
Cancel
Close

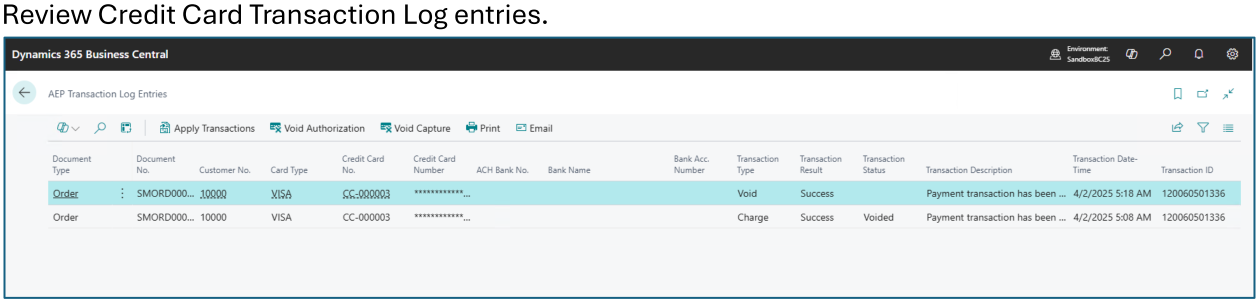

Dynamics 365 Business Central
SMFee Sales Order
SMORD00007 · The Cannon Grou
Credit Card Transaction - Order · SMORD00007 · 10000 · The Cannon Group PLC
Manage
Home
Void
Card
Page
Select Trans. to Void...
Void
General
Merchant ID
DEFAULT
Default Card to Use O...
Card on File
Card Swipe Test
Credit Card Number
Card Type
VISA
Credit Card No.
CC-000003
Cr. Card Number (Last...
************1111
First Name
Ivan
Last Name
Test
Card Expiry (MMYY)
1231
Save Card
Parent Entry No.
5
Total Amount
1,400.00
Apply Credit No.
Amount Captured
1,400.00
Amount Authorized
0.00
Reauthorize
Amount to Capture
0.00
Amount To Void
1,400.00
Customer No.
10000
Company Name
The Cannon Group PLC
Address
1099 38th Ave
Address 2
Zip Code
95062
City
Santa Cruz
State
CA
Country/Region Code
US
Fax No.
Close

Void card charge.

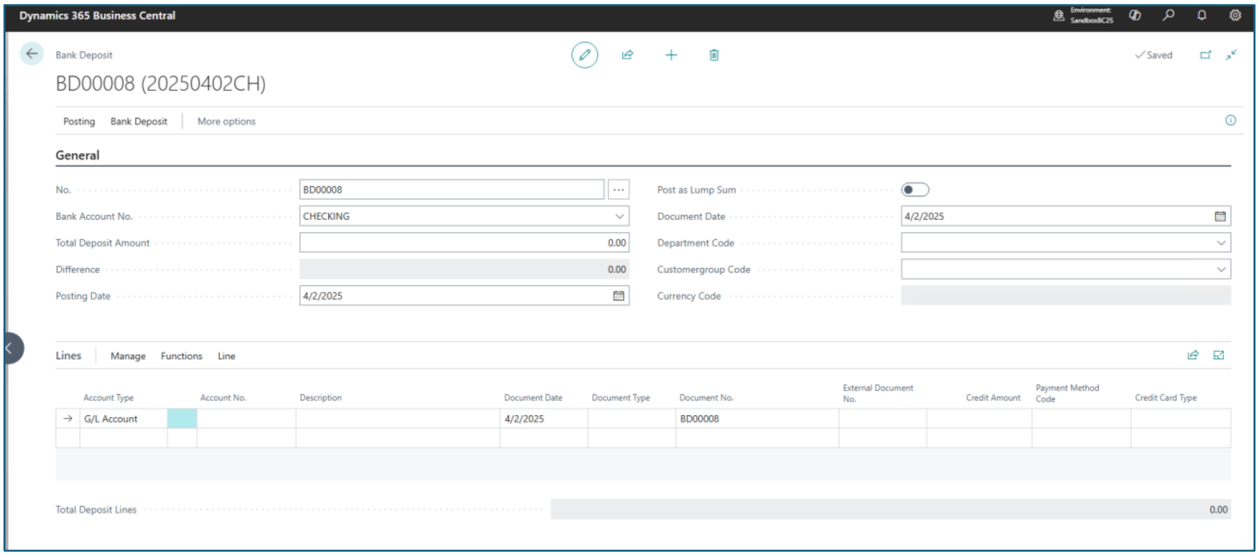




Review Credit Card Transaction Log entries.



Deposit line is removed.



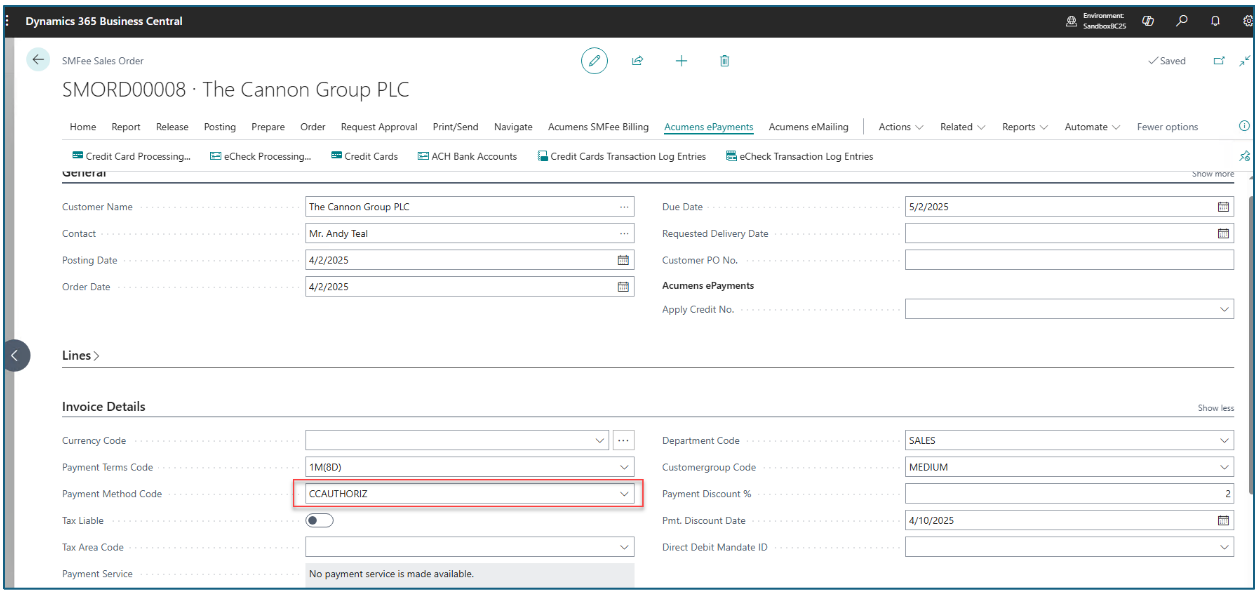
5.2. ACH Transaction.

ACH transactions can be performed for SMFee Sales documents and APS Sales documents. Transactions are performed the same way as standard sales documents.

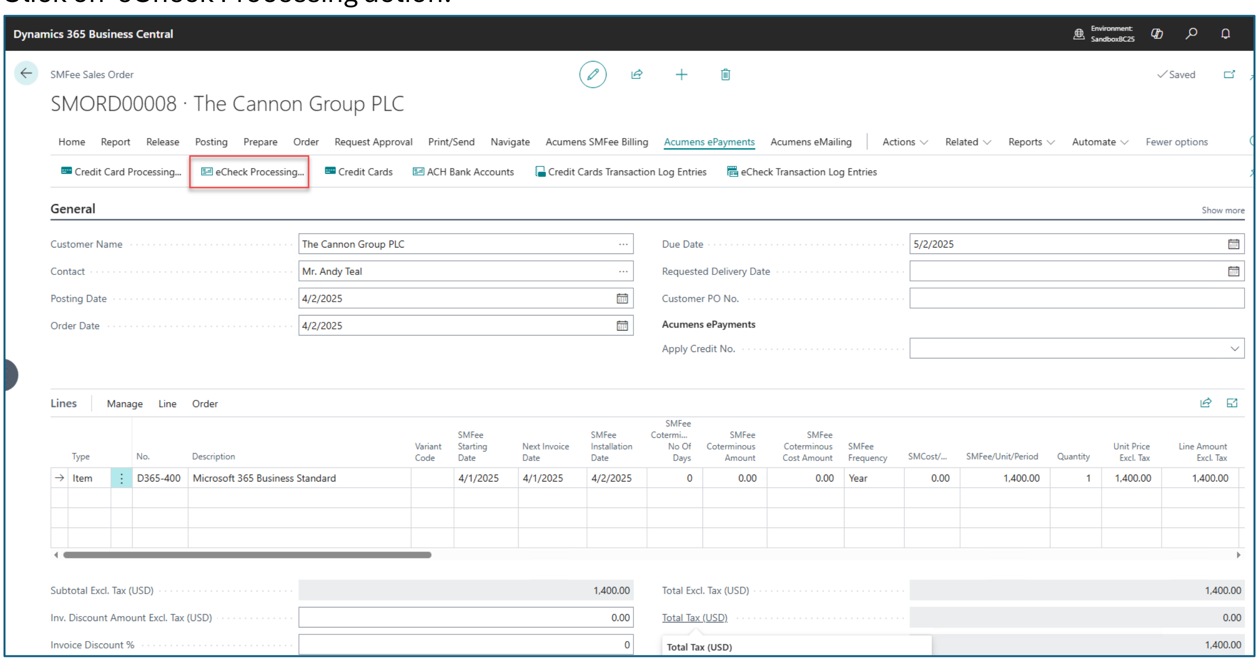
Below is a sample on SMFee Sales Order.

To process the ACH payments on the Order,

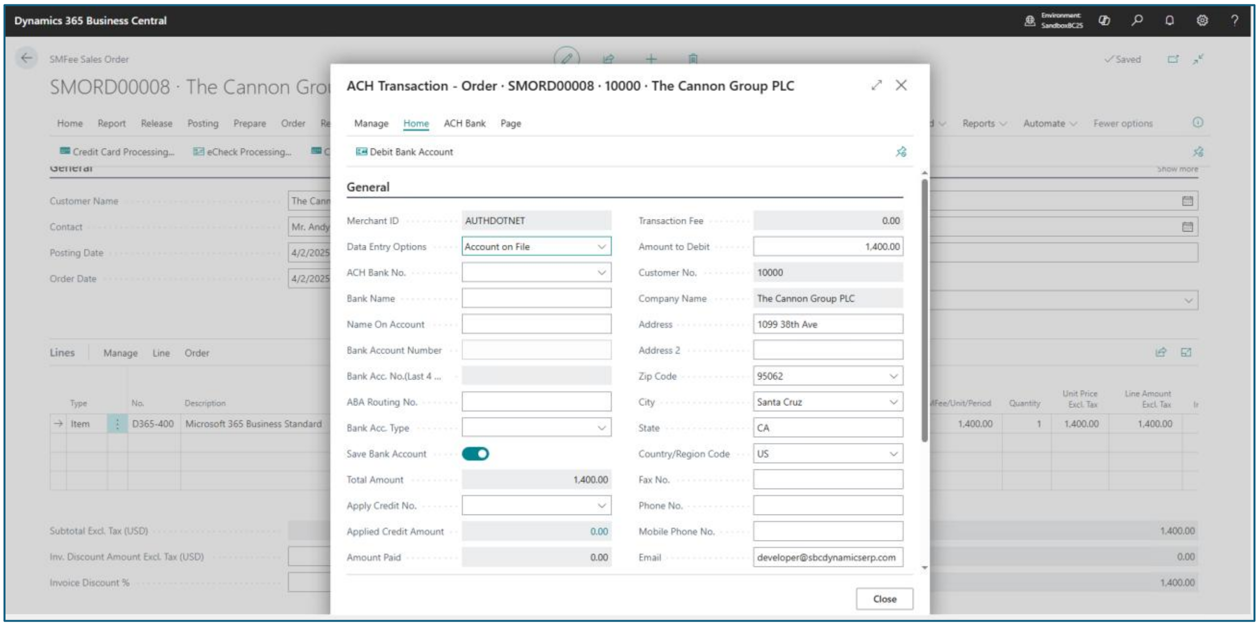
Open the Order and select Payment Method.



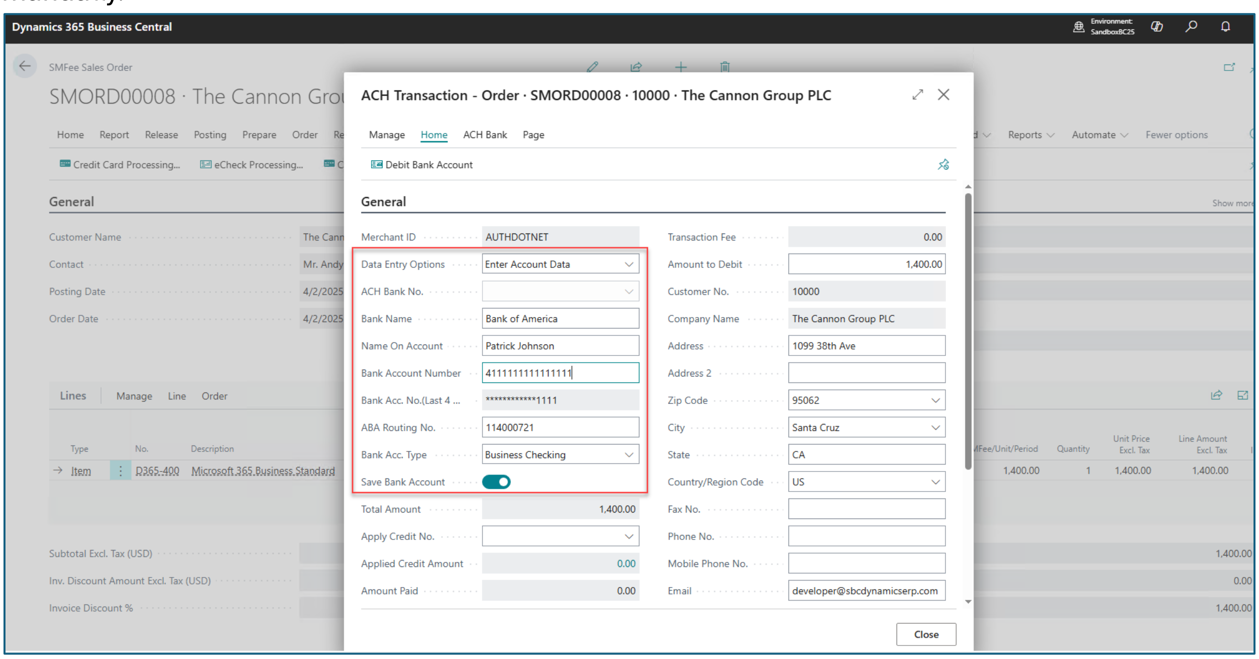
Click on eCheck Processing action.



Opens the ACH Transaction page.

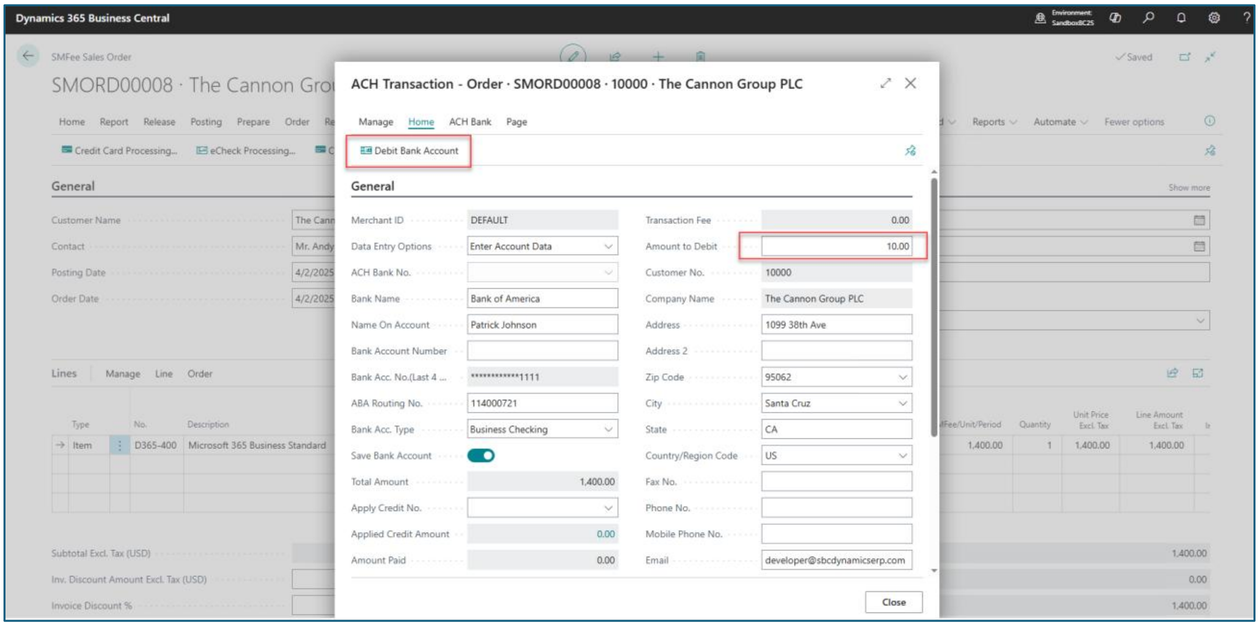


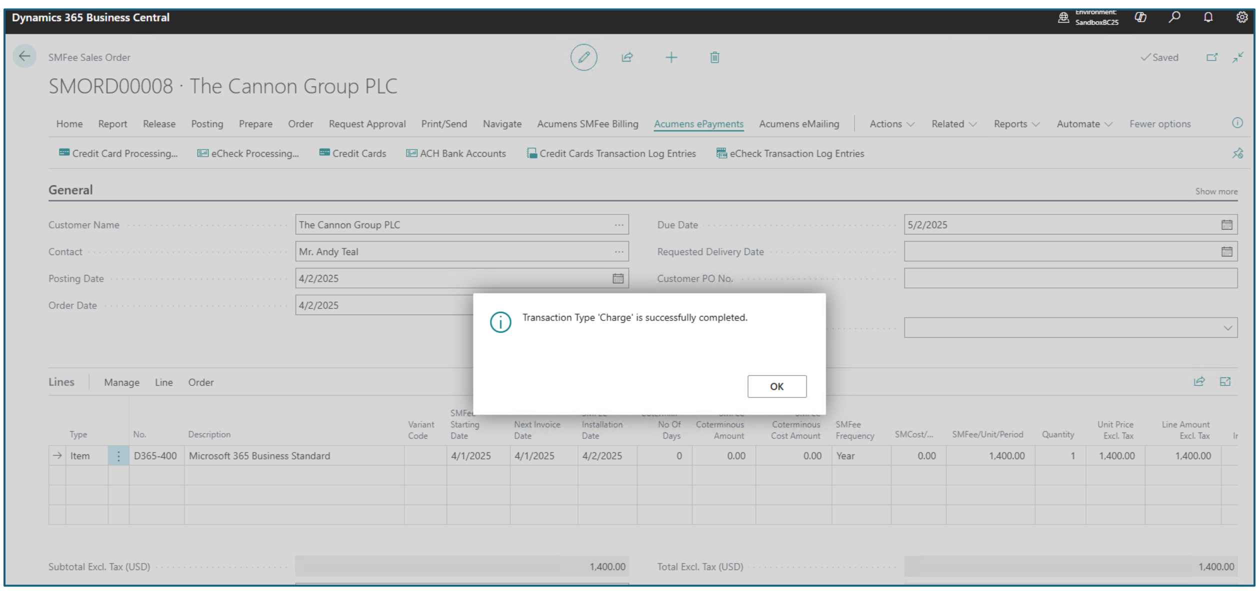
Select or enter the ACH Bank details. In this case, we are going to enter bank account details manually.



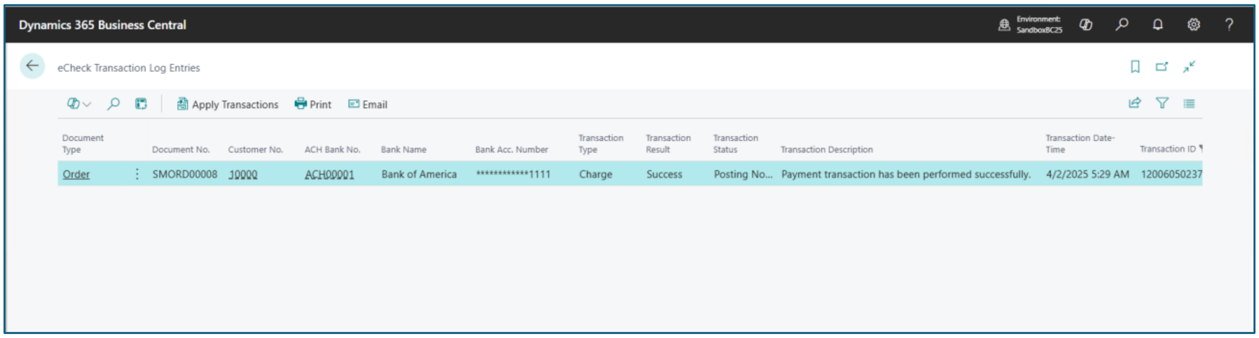
Debit Bank Account.

By default the amount is defaulted to the Order amount including Tax. Update the amount to Debit and Click on Debit Bank Account action.

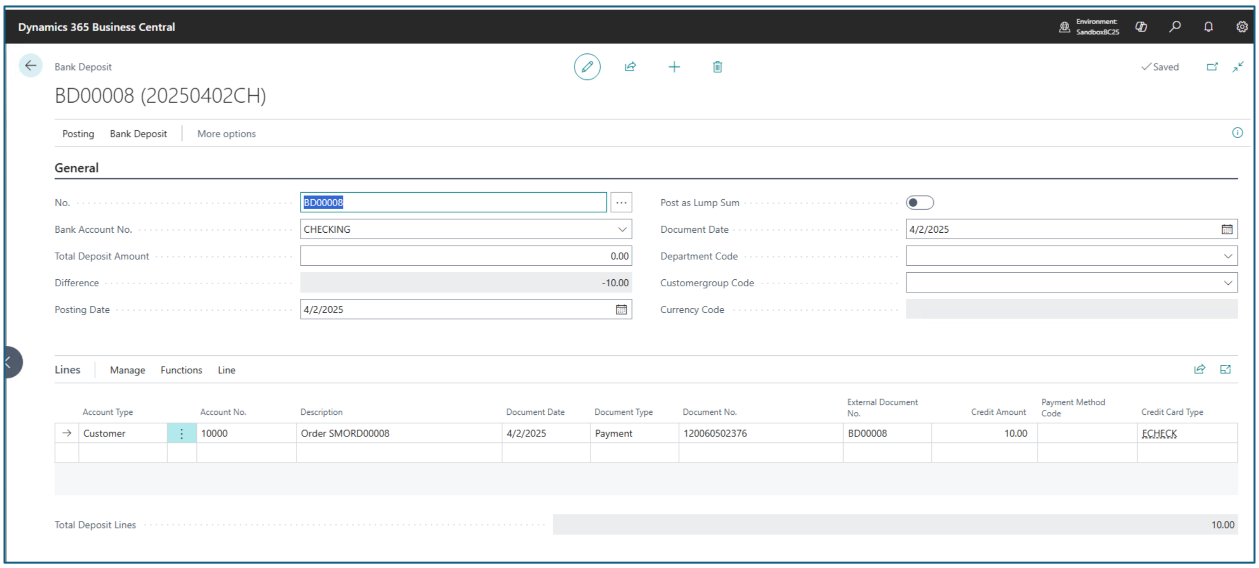




eCheck Transaction entries.



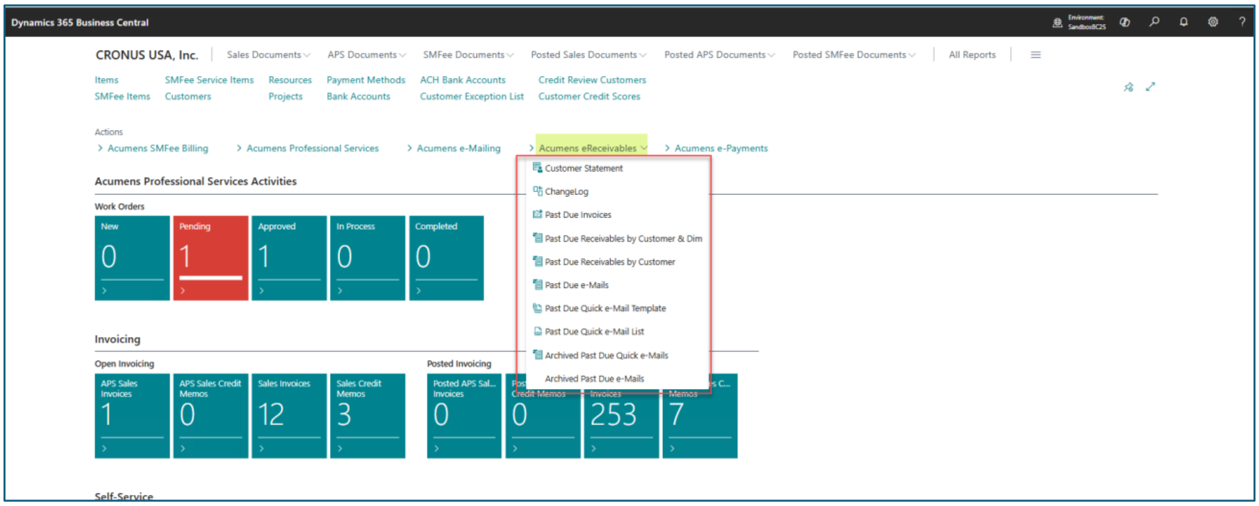
Bank Deposit for the transaction is also created for posting.

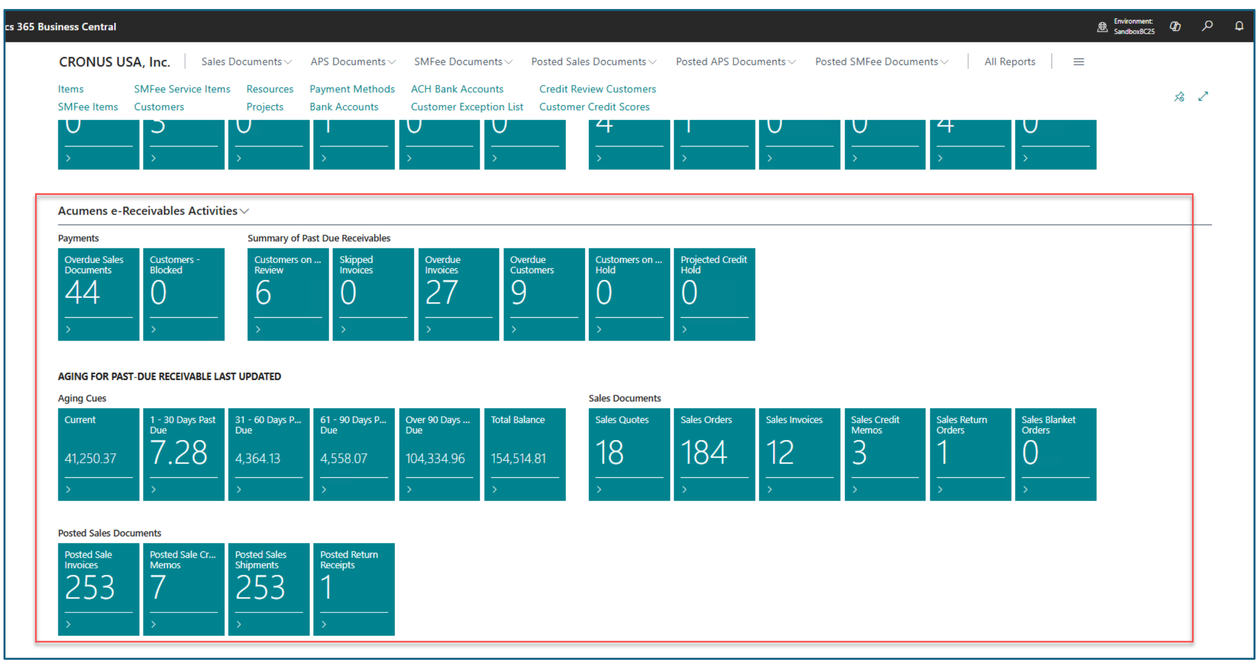


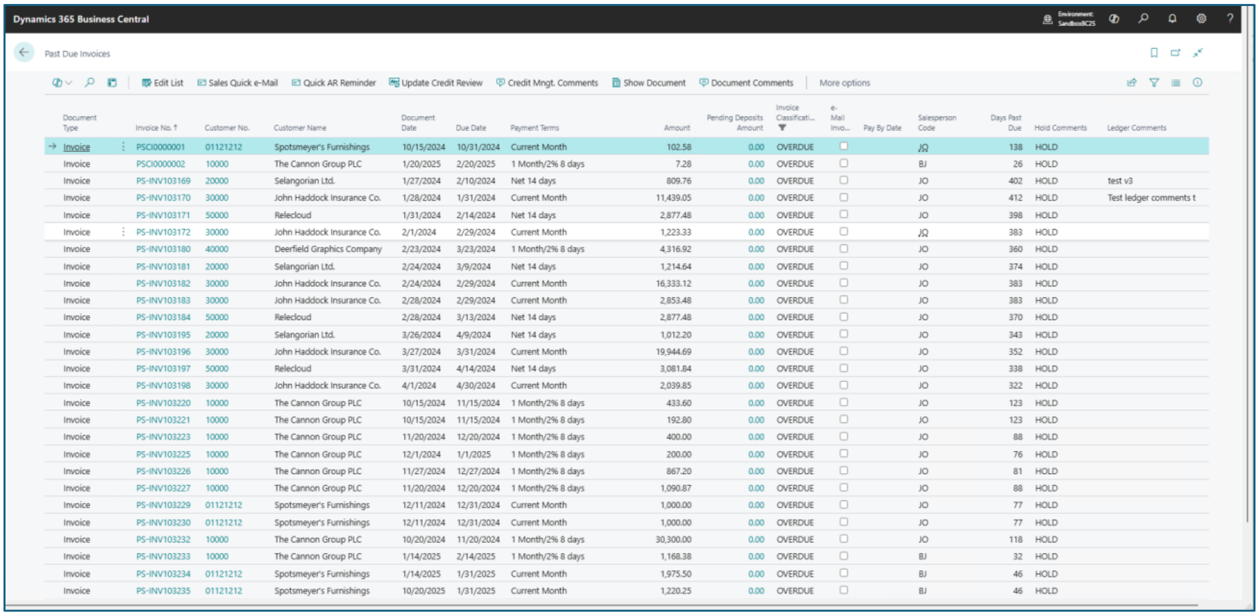
6. Emailing and e-Receivables.

6.1. e-Receivables for SMFee and APS Documents.

All the features for Acumens e-Receivable App apply for this app.







Dynamics 365 Business Central

Environment: SandboxBC25

Past Due Invoices

Edit List | Sales Quick e-Mail | Quick AR Reminder | Update Credit Review | Credit Mngt. Comments | Show Document | Document Comments | More options

Document Type	Invoice No. ↑	Customer No.	Customer Name	Document Date	Due Date	Payment Terms	Amount	Pending Deposits Amount	Invoice Classificati...	e-Mail Invo...	Pay By Date	Salesperson Code	Days Past Due	Hold Comments	Ledger Comments
Invoice	PSCI0000001	01121212	Spotsmeyer's Furnishings	10/15/2024	10/31/2024	Current Month	102.58	0.00	OVERDUE	☐		JO	138	HOLD	
Invoice	PSCI0000002	10000	The Cannon Group PLC	1/20/2025	2/20/2025	1 Month/2% 8 days	7.28	0.00	OVERDUE	☐		BJ	26	HOLD	
Invoice	PS-INV103169	20000	Selangorian Ltd.	1/27/2024	2/10/2024	Net 14 days	809.76	0.00	OVERDUE	☐		JO	402	HOLD	test v3
Invoice	PS-INV103170	30000	John Haddock Insurance Co.	1/28/2024	1/31/2024	Current Month	11,439.05	0.00	OVERDUE	☐		JO	412	HOLD	Test ledger comments t
Invoice	PS-INV103171	50000	Relecloud	1/31/2024	2/14/2024	Net 14 days	2,877.48	0.00	OVERDUE	☐		JO	398	HOLD	
Invoice	PS-INV103172	30000	John Haddock Insurance Co.	2/1/2024	2/29/2024	Current Month	1,223.33	0.00	OVERDUE	☐		JO	383	HOLD	
Invoice	PS-INV103180	40000	Deerfield Graphics Company	2/23/2024	3/23/2024	1 Month/2% 8 days	4,316.92	0.00	OVERDUE	☐		JO	360	HOLD	
Invoice	PS-INV103181	20000	Selangorian Ltd.	2/24/2024	3/9/2024	Net 14 days	1,214.64	0.00	OVERDUE	☐		JO	374	HOLD	
Invoice	PS-INV103182	30000	John Haddock Insurance Co.	2/24/2024	2/29/2024	Current Month	16,333.12	0.00	OVERDUE	☐		JO	383	HOLD	
Invoice	PS-INV103183	30000	John Haddock Insurance Co.	2/28/2024	2/29/2024	Current Month	2,853.48	0.00	OVERDUE	☐		JO	383	HOLD	
Invoice	PS-INV103184	50000	Relecloud	2/28/2024	3/13/2024	Net 14 days	2,877.48	0.00	OVERDUE	☐		JO	370	HOLD	
Invoice	PS-INV103195	20000	Selangorian Ltd.	3/26/2024	4/9/2024	Net 14 days	1,012.20	0.00	OVERDUE	☐		JO	343	HOLD	
Invoice	PS-INV103196	30000	John Haddock Insurance Co.	3/27/2024	3/31/2024	Current Month	19,944.69	0.00	OVERDUE	☐		JO	352	HOLD	
Invoice	PS-INV103197	50000	Relecloud	3/31/2024	4/14/2024	Net 14 days	3,081.84	0.00	OVERDUE	☐		JO	338	HOLD	
Invoice	PS-INV103198	30000	John Haddock Insurance Co.	4/1/2024	4/30/2024	Current Month	2,039.85	0.00	OVERDUE	☐		JO	322	HOLD	
Invoice	PS-INV103220	10000	The Cannon Group PLC	10/15/2024	11/15/2024	1 Month/2% 8 days	433.60	0.00	OVERDUE	☐		JO	123	HOLD	
Invoice	PS-INV103221	10000	The Cannon Group PLC	10/15/2024	11/15/2024	1 Month/2% 8 days	192.80	0.00	OVERDUE	☐		JO	123	HOLD	
Invoice	PS-INV103223	10000	The Cannon Group PLC	11/20/2024	12/20/2024	1 Month/2% 8 days	400.00	0.00	OVERDUE	☐		JO	88	HOLD	
Invoice	PS-INV103225	10000	The Cannon Group PLC	12/1/2024	1/1/2025	1 Month/2% 8 days	200.00	0.00	OVERDUE	☐		JO	76	HOLD	
Invoice	PS-INV103226	10000	The Cannon Group PLC	11/27/2024	12/27/2024	1 Month/2% 8 days	867.20	0.00	OVERDUE	☐		JO	81	HOLD	
Invoice	PS-INV103227	10000	The Cannon Group PLC	11/20/2024	12/20/2024	1 Month/2% 8 days	1,090.87	0.00	OVERDUE	☐		JO	88	HOLD	
Invoice	PS-INV103229	01121212	Spotsmeyer's Furnishings	12/11/2024	12/31/2024	Current Month	1,000.00	0.00	OVERDUE	☐		JO	77	HOLD	
Invoice	PS-INV103230	01121212	Spotsmeyer's Furnishings	12/11/2024	12/31/2024	Current Month	1,000.00	0.00	OVERDUE	☐		JO	77	HOLD	
Invoice	PS-INV103232	10000	The Cannon Group PLC	10/20/2024	11/20/2024	1 Month/2% 8 days	30,300.00	0.00	OVERDUE	☐		JO	118	HOLD	
Invoice	PS-INV103233	10000	The Cannon Group PLC	1/14/2025	2/14/2025	1 Month/2% 8 days	1,168.38	0.00	OVERDUE	☐		BJ	32	HOLD	
Invoice	PS-INV103234	01121212	Spotsmeyer's Furnishings	1/14/2025	1/31/2025	Current Month	1,975.50	0.00	OVERDUE	☐		BJ	46	HOLD	
Invoice	PS-INV103235	01121212	Spotsmeyer's Furnishings	10/20/2025	1/31/2025	Current Month	1,220.25	0.00	OVERDUE	☐		BJ	46	HOLD	

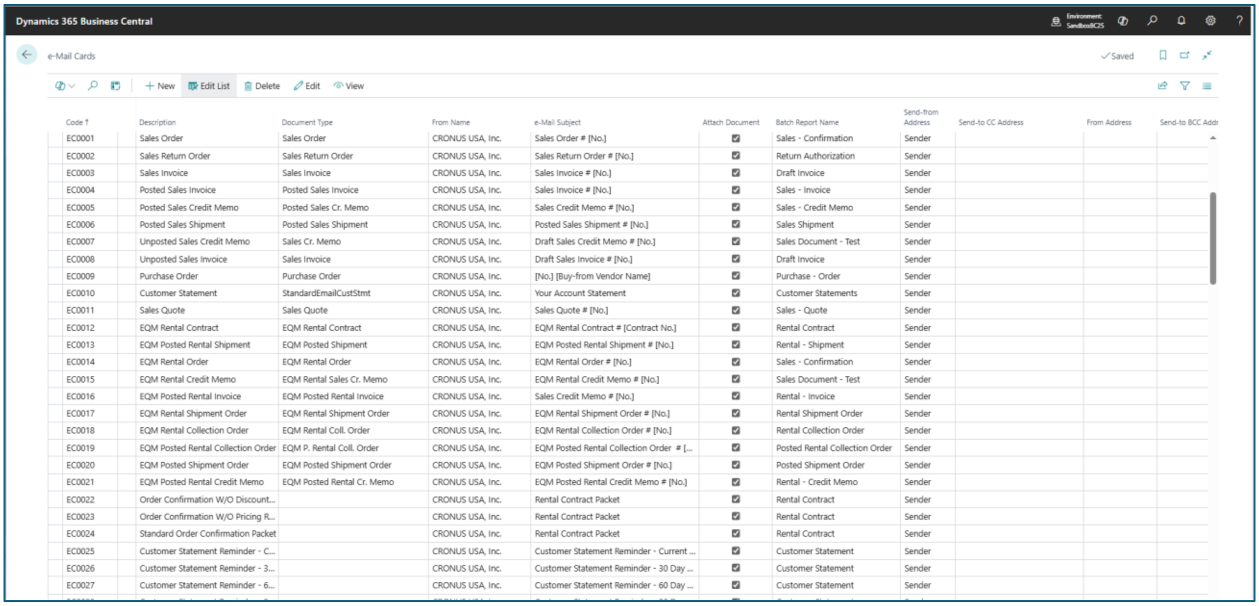
More details on these features are available in Acumens e-Receivables Management App documentation.

6.2. Acumens e-Mailing.

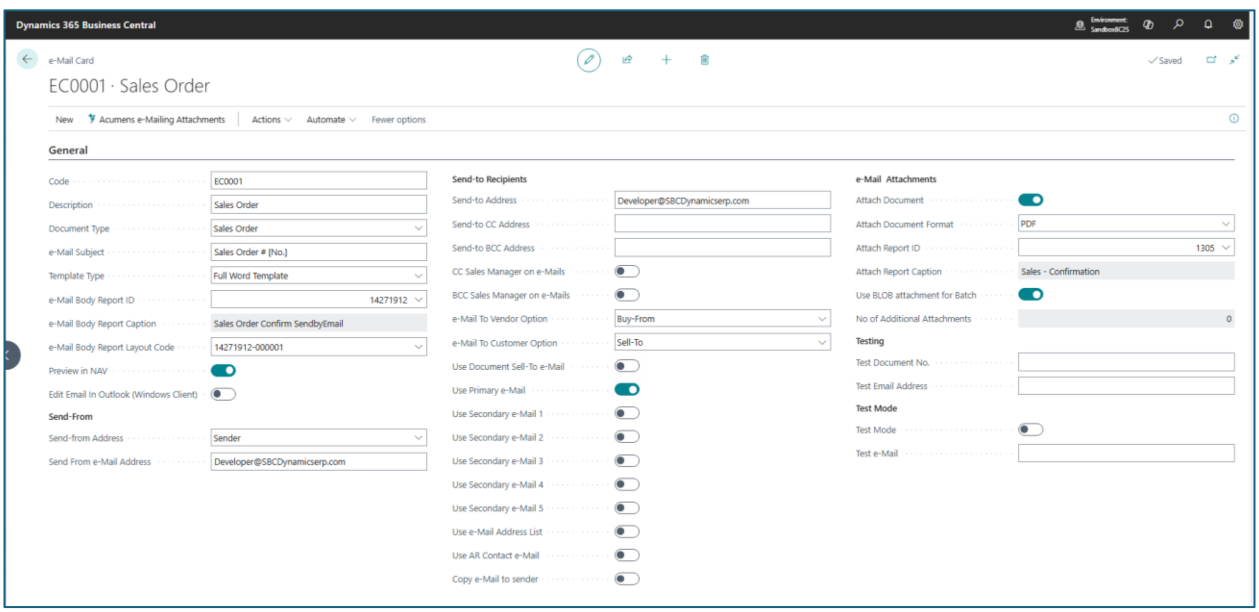
Emailing for SMFee and APS documents is handled the same as for Standard Sales Documents.

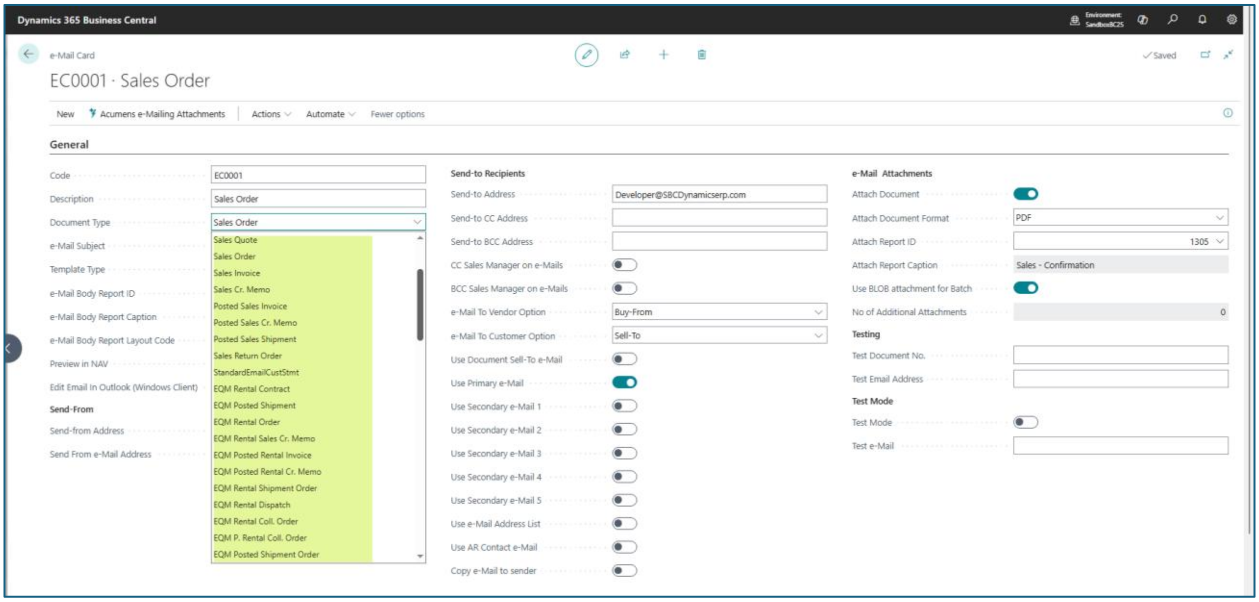
6.2.1. eMailing Cards for Sales Documents

An e-mail card specifies various parameters that are used to send emails.



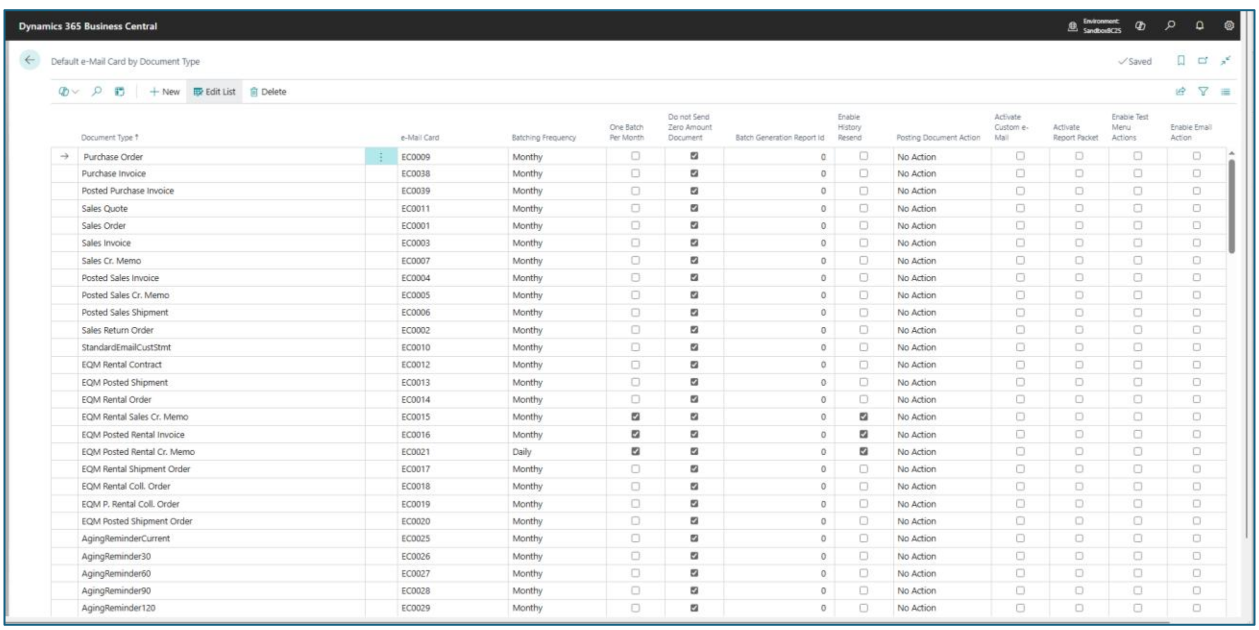
Email Cards are set up for each ASM Document by specifying the Document Type field.





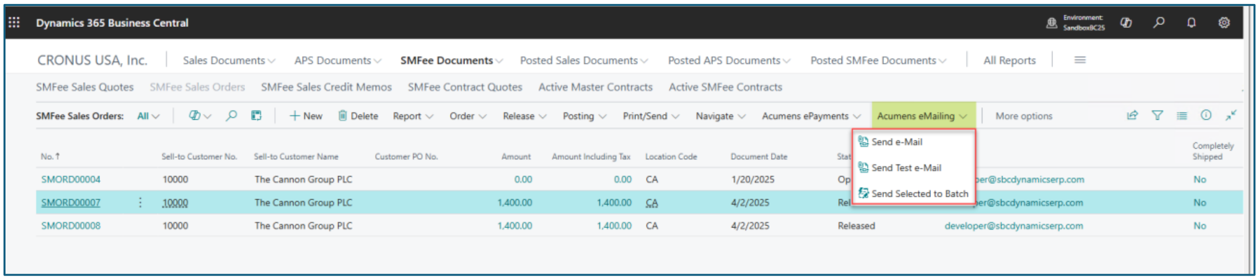
7.2.1. Default e-Mail Cards by Document.

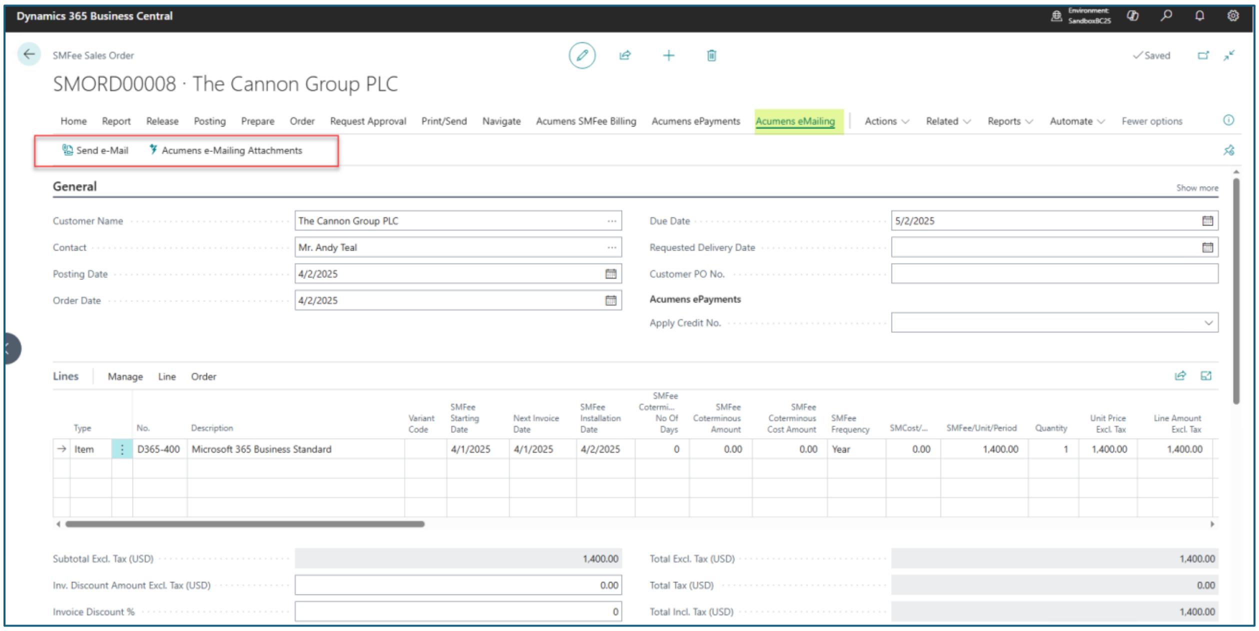
Specifies the e-Mail card to use by default for each document when emailing the document and what should happen when a document is posted. Here you can also control visibility of actions within documents such as Activate custom e-Mail, activate report packets, and enable test menu actions.

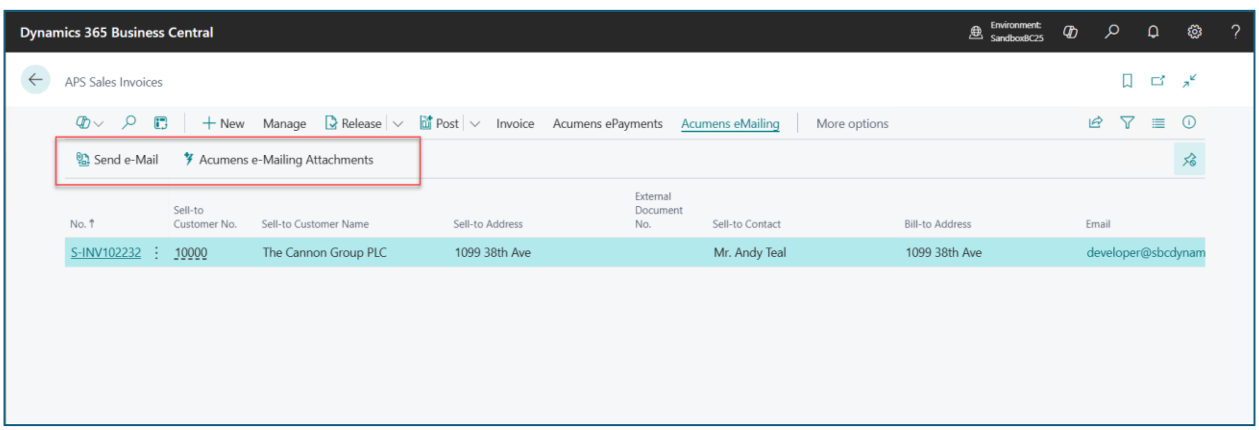


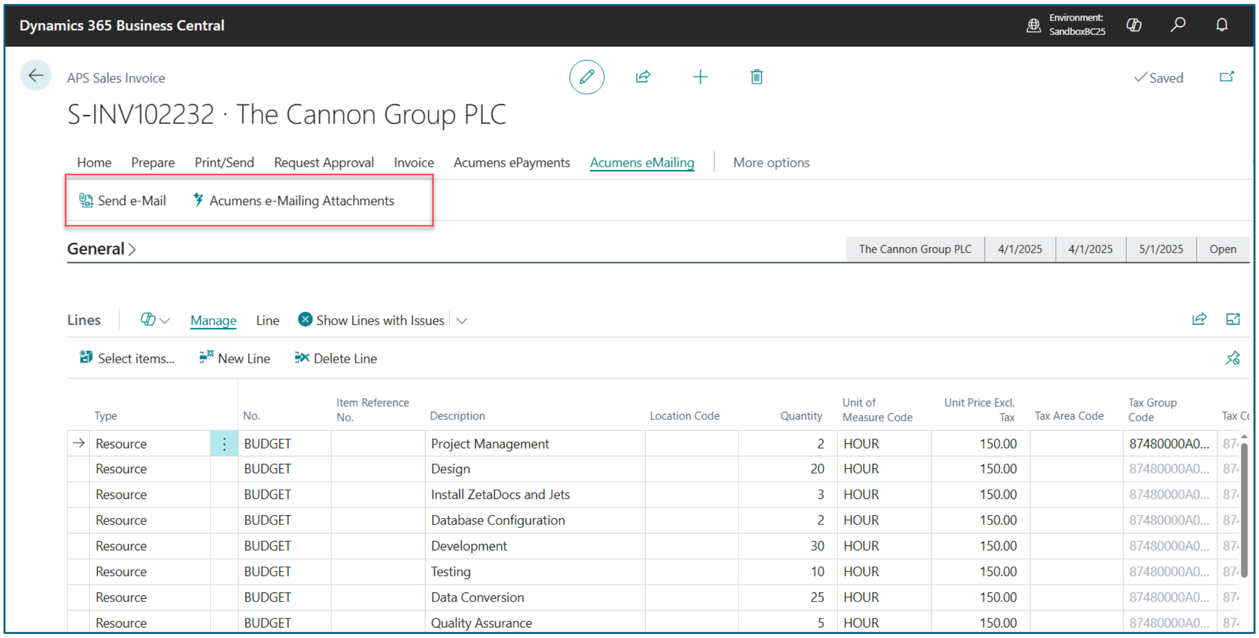
7.2.1. e-Mailing SsMFee and APS Documents.

On SMFee Document list and card pages, Acumens e-Mailing action group is available as below.



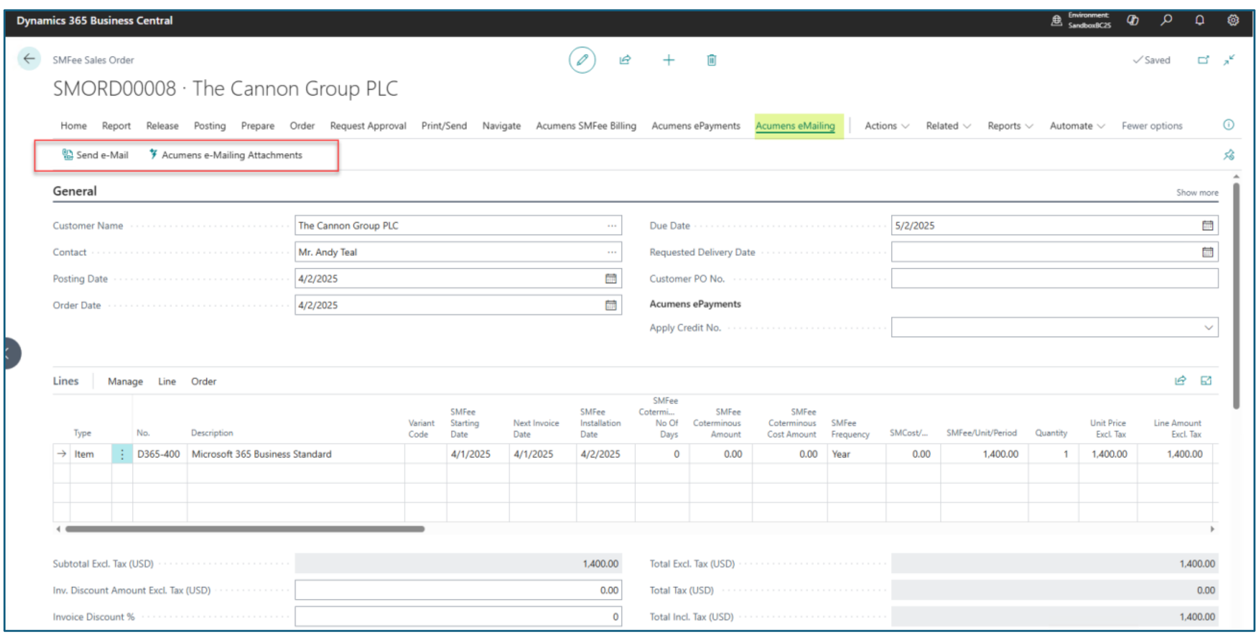


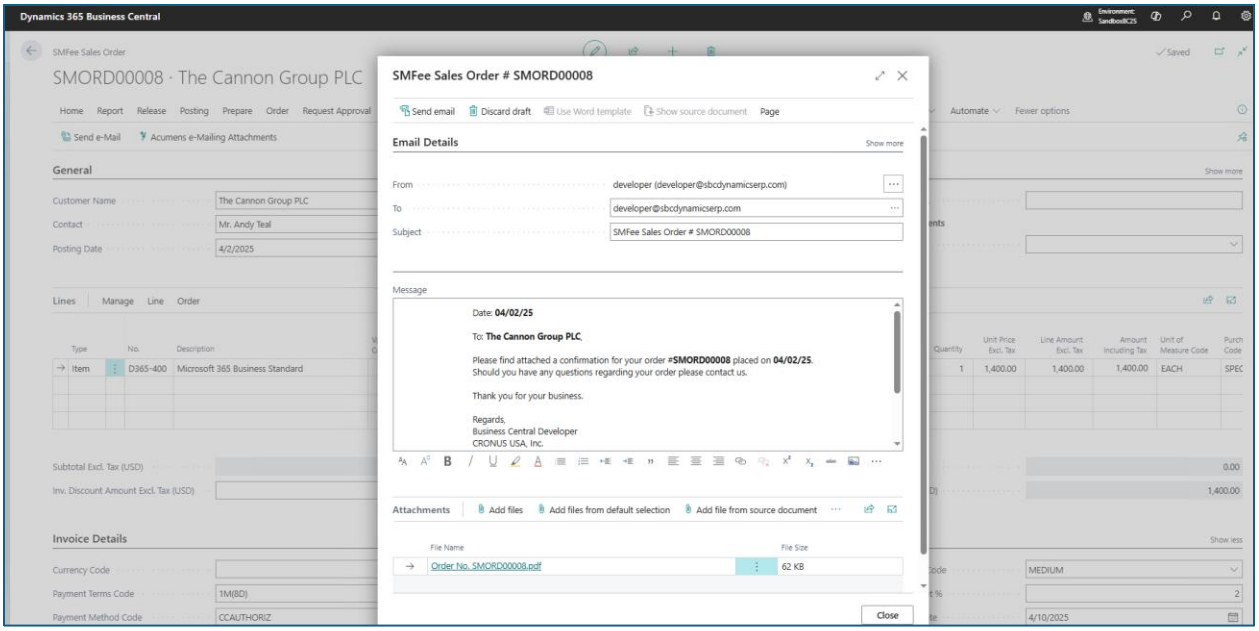




You can send individual documents per email template defined for each document based on the Defaults E-Mail cards by Document setup.

Example on SMFee Sales Order.





Dynamics 365 Business Central
SMFee Sales Order
SMORD00008 · The Cannon Group PLC
SMFee Sales Order # SMORD00008
Send email
Discard draft
Use Word template
Show source document
Page
Email Details
From
developer (developer@sbcdynamicserp.com)
To
developer@sbcdynamicserp.com
Subject
SMFee Sales Order # SMORD00008
Message
Date: 04/02/25
To: The Cannon Group PLC,
Please find attached a confirmation for your order #SMORD00008 placed on 04/02/25.
Should you have any questions regarding your order please contact us.
Thank you for your business.
Regards,
Business Central Developer
CRONUS USA, Inc.
Attachments
Add files
Add files from default selection
Add file from source document
File Name
File Size
Order No. SMORD00008.pdf
62 KB
Close

SMFee Sales Order # SMORD00008

BC

Business Central Developer

To Business Central Developer

Cc Bernard Rono

1:13 PM

Order No. SMORD00008.pdf

62 KB

Date: **04/02/25**

To: **The Cannon Group PLC**,

Please find attached a confirmation for your order #**SMORD00008** placed on **04/02/25**. Should you have any questions regarding your order please contact us.

Thank you for your business.

Regards,
Business Central Developer
CRONUS USA, Inc.

cronus