Acumens Starter-Pack Functional Preview

Version: MS Dynamics BC25

Prepared & developed by

SBC Dynamics ERP

Document History

Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
1.0	03-01-2024		Document Prepared
2.0	04-08-2024	1 & 2	Added features: Custom Service Report Templates Change Log Lookup & Analysis SalesTax for Service Management Extended Taxability
4	04/23/2024	1	Add App Tracker Feature
5	04/23/2024	2	Update change log lookup & analysis for EQM. Update Contract report templates
7	08/19/2024	1	Add Full Tax Document
8	11/25/2024		Document Revised.
9	12/27/2024		Document updated

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Overview.

Acumens Starter Pack is a collection of Business Central Advancement Features listed below:

Standard Business Central Advanced Features:

- Cheque Printing with multipage stub and check template with MICR code.
- Limit Payment tolerance to underpayment.
- Sales Tax reporting.
- Alternate Ship-to Address.
- Custom Sales Documents Report Templates.
- Custom Service Documents Report Templates.
- Extended Global Dimensions.
- Document Locking.
- User driven FTP File uploads.
- Change Log Lookup.
- Table Lock Analysis.
- App Tracker.
- G/L Access restrictions.
- Sales Adjustment.
- Inventory Adjustment Reason codes.
- Write off returned Inventory.
- Bank Reconciliation for NA.
- DocuSign Approval Process.
- Mass Image Import and Export.

1. Acumens Starter-Pack & Simple EDI Features:

1.1. Cheque Printing.

1.1.1. Custom Cheque Printing with multiple page stub.

Standard Check Printing allows a maximum of 10 lines printed on details. If the lines exceed 10 the remaining are moved to the next page and check printing moved to the last page.

London Postmaster   January 25, 2024   Check 320

Document No.	Document Date	Posting Description	Amount	Discount	Net Amount
001	1/25/2024	Invoice 1002	12.00	0.00	12.00
002	1/25/2024	Invoice 1003	24.00	0.00	24.00
003	1/25/2024	Invoice 1004	36.00	0.00	36.00
004	1/25/2024	Invoice 1005	48.00	0.00	48.00
005	1/25/2024	Invoice 1006	24.00	0.00	24.00
006	1/25/2024	Invoice 1007	12.00	0.00	12.00
007	1/25/2024	Invoice 1008	36.00	0.00	36.00
008	1/25/2024	Invoice 1009	150.00	0.00	150.00
009	1/25/2024	Invoice 1010	12.00	0.00	12.00
010	1/25/2024	Invoice 1011	12.00	0.00	12.00

Total   **366.00**

London Postmaster   January 25, 2024   Check   320

Document No.	Document Date	Posting Description	Amount	Discount	Net Amount
001	1/25/2024	Invoice 1002	12.00		12.00
002	1/25/2024	Invoice 1003	24.00		24.00
003	1/25/2024	Invoice 1004	36.00		36.00
004	1/25/2024	Invoice 1005	48.00		48.00
005	1/25/2024	Invoice 1006	24.00		24.00
006	1/25/2024	Invoice 1007	12.00		12.00
007	1/25/2024	Invoice 1008	36.00		36.00
008	1/25/2024	Invoice 1009	150.00		150.00
009	1/25/2024	Invoice 1010	12.00		12.00
010	1/25/2024	Invoice 1011	12.00		12.00

Total   **366.00**

                                    AA   99-99-888C   320

CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

[VOID VOID VOID VOID VOID VOID VOID VOID VOID VOID VOID VOID VOID VOID VOID VOID]
VOID VOID VOID VOID VOID VOID VOID VOID VOID VOID VOID VOID VOID VOID VOID

                    [January 25, 2024]   [***************]

London Postmaster
10 North Lake Avenue
Atlanta, GA 31772
USA

                                    NON-NEGOTIABLE

London Postmaster   **January 25, 2024**   **Check 321**

Document No.	Document Date	Posting Description	Amount	Discount	Net Amount
011	1/25/2024	Invoice 1012	12.00	0.00	12.00
012	1/25/2024	Invoice 1013	12.00	0.00	12.00
013	1/25/2024	Invoice 1014	144.00	0.00	144.00

		Total	**534.00**

AA   99-99-888C   321

CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

[****FIVE HUNDRED THIRTY FOUR AND 0/100 US DOLLARS]

[January 25, 2024]   [$*********534.00]

London Postmaster
10 North Lake Avenue
Atlanta, GA 31772
USA

Custom Check Printing introduces a feature where details are printed to a separate document.

Check printed:

London Postmaster	January 25, 2024	Check 318

		Total	534.00

London Postmaster			January 25, 2024		Check	318
Document No.	Document Date	Posting Description		Amount	Discount	Net Amount
		****SEE THE ATTACHMENT****				

		Total	534.00

	AA	C	318

CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

[****FIVE HUNDRED THIRTY FOUR AND 0/100 US DOLLARS]

[January 25, 2024]   [$*********534.00]

London Postmaster
10 North Lake Avenue
Atlanta, GA 31772
USA

Details Attached:

Check Detail - Report

		January 25, 2024	Check No.	318
Document No.	**Document Date**	**Posting Description**		**Amount**
001	01/25/24	108038		12.00
002	01/25/24	108039		24.00
003	01/25/24	108040		36.00
004	01/25/24	108041		48.00
005	01/25/24	108042		24.00
006	01/25/24	108043		12.00
007	01/25/24	108044		36.00
008	01/25/24	108045		150.00
009	01/25/24	108046		12.00
010	01/25/24	108047		12.00
011	01/25/24	108048		12.00
012	01/25/24	108049		12.00
013	01/25/24	108050		144.00
			Total	**534.00**

1.1.2. Check with MICR Code.

Report run options:
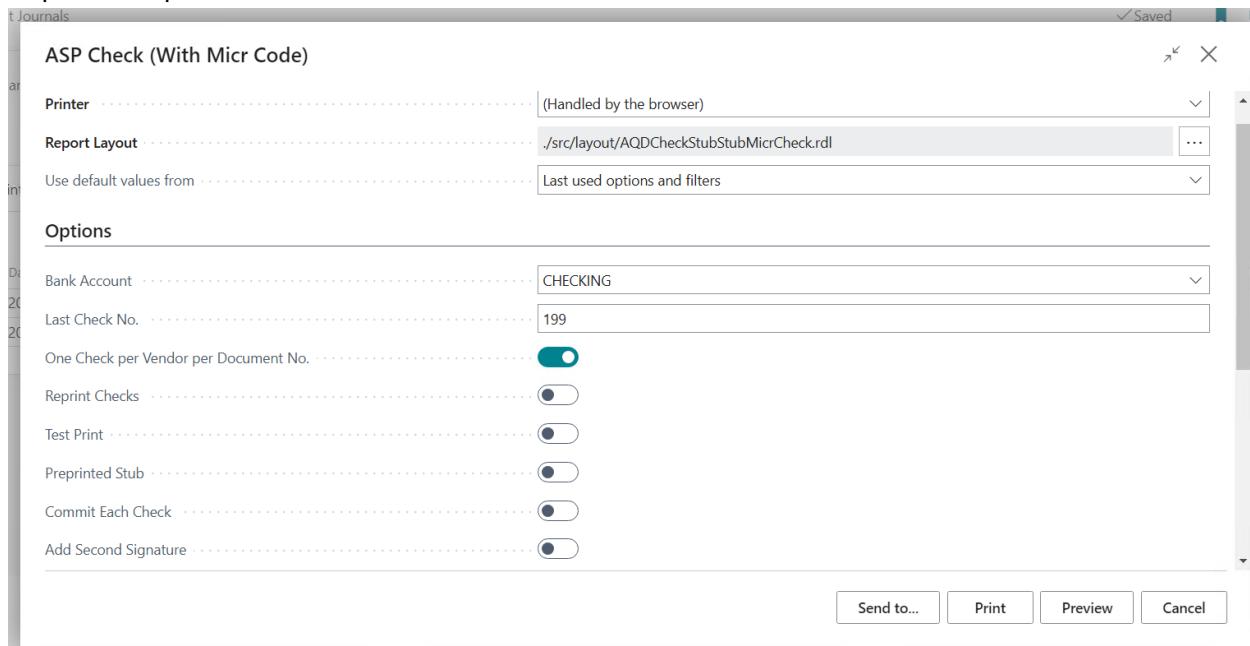
Check Printed with MICR code at the bottom of the check.:

CRONUS USA, Inc.

DATE	INVOICE	DESCRIPTION	AMOUNT	RETAINAGE	DISCOUNT	NET
3/9/2024	107199	Invoice 107199	1,255.89			1,255.89
3/12/2024	107203	Invoice 107203	1,433.86			1,433.86
CHEQUE DATE 11/19/2024	**CHEQUE NUMBER** 200 TOTAL>		2,689.75			2,689.75

CRONUS USA, Inc.

DATE	INVOICE	DESCRIPTION	AMOUNT	RETAINAGE	DISCOUNT	NET
3/9/2024	107199	Invoice 107199	1,255.89			1,255.89
3/12/2024	107203	Invoice 107203	1,433.86			1,433.86
CHEQUE DATE 11/19/2024	**CHEQUE NUMBER** 200 TOTAL>		2,689.75			2,689.75

PLEASE DETACH AND RETAIN FOR YOUR RECORDS

CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

World Wide Bank
1 High Holborn
London GB-WC1 3DG

200

TAC CWJA COURT ANT TR AAEP PEBEP FTBB BE EK BB 2017 16:51 00 14:33 11 B1:27

DATE 1 1 1 9 2 0 2 4
M M D D Y Y Y Y

Pay: ****TWO THOUSAND SIX HUNDRED EIGHTY NINE AND 75/100 US DOLLARS

$*******2,689.75

TO
THE
ORDER
OF
First Up Consultants
100 Day Drive
Chicago, IL 61236
USA

_____

_____
PAYABLE IN US DOLLARS

⑈000000 200⑈ ⑆⑈6 9⑆ 9 9 ⑈⑈ 9 9 ⑈⑈ 8 ⑈⑈⑈⑈⑈⑈

1.2. Limit Payment tolerance to underpayment.

This feature allows posting of a tolerance amount if the customer underpays within the allowed tolerance amount but does not post tolerance if the customer pays over the amount owed within the tolerance limit.

Underpayment:

Overpayment:

Dynamics 365 Business Central

10000 - The Cannon Group PLC | Work Date: 1/28/2024   ✓ Saved

Customer Ledger Entries   🔍 Search   📝 Edit List   Process   Report   Line   Entry   Navigate   More options

Posting Date	Document Type	Document No.	Project Code	Currency Code	Original Amount	Amount	Amount ($)	Remaining Amount	Remaining Amt. ($)	Sales ($)	Due Date	Pmt. Discount Date	Pmt. Disc. Tolerance Date
→ 1/28/2024	Payment	G02022			-107.00	-107.00	-107.00	-0.75	-0.75	0.00	1/28/2024		
1/28/2024	Invoice	103037			106.25	106.25	106.25	0.00	0.00	100.00	2/27/2024	1/28/2024	1/28/2024
1/28/2024	Payment	G02021			-106.00	-106.25	-106.25	0.00	0.00	0.00	1/28/2024		
1/28/2024	Invoice	103036			106.25	106.25	106.25	0.00	0.00	100.00	2/27/2024	1/28/2024	1/28/2024
1/28/2024	Payment	G02020			-107.00	-106.25	-106.25	0.00	0.00	0.00	1/28/2024		
1/28/2024	Invoice	103035			106.25	106.25	106.25	0.00	0.00	100.00	2/27/2024	1/28/2024	1/28/2024
1/28/2024	Payment	G02019			-107.00	-107.00	-107.00	-107.00	-107.00	0.00	1/28/2024		
1/28/2024	Invoice	103034			106.25	106.25	106.25	106.25	106.25	100.00	2/28/2024	2/5/2024	2/5/2024
1/28/2024		G02018			-54.50	-54.50	-54.50	0.00	0.00	0.00	1/28/2024		

Dynamics 365 Business Central

2370 | Work Date: 1/28/2024

Detailed Customer Ledger Entries   🔍 Search   Process   Entry   More options

Posting Date	Entry Type	Document Type	Document No.	Customer No.	Currency Code	Amount	Amount ($)	Initial Entry Due Date	Entry No. ↑
1/28/2024	Initial Entry	Payment	G02022	10000		-107.00	-107.00	1/28/2024	220
1/28/2024	Application	Payment	G02022	10000		106.25	106.25	1/28/2024	224

1.3.   SalesTax

1.3.1.   SalesTax Enhancements:

StarterPack introduces Sales Tax on Service Contract Quotes and Service Contracts documents which are included in the Print document too.

Service Contract Quote

Service Contract.

Extended Resource and Item Taxability is also included in this module. i.e. a resource can be taxable or non-taxable based on items being processed in the document and vice versa.

Item:

Resource:

Resource has additional features where it can be auto added to order based on order items.

1.3.2. Sales Tax Reporting:

This Feature is designed to help with Sales Tax Reporting.

The Sales Tax Report is processed from a Sales Tax Settlement Journal.

Sample Report Output:

Reported Entries are closed using the page action below:

1.3.3. Full Tax Document

This feature is meant to allow sales tax amount updates by posting a document which is full tax and is reflected in sales tax reporting:

Posted Document:

Tax Details:

Tax Details | Work Date: 1/25/2024

Tax Jurisdiction Code ↑	Tax Group Code ↑	Tax Type ↑	Effective Date ↑	Tax Below Maximum	Maximum Amount/Qty.	Tax Above Maximum	Expense/Cap...
CA	SALESTAX	Sales and Use Tax	1/25/2024	0.0	0.00	0.0	
CA	SUPPLIES	Sales and Use Tax	1/25/2024	6.5	0.00	0.0	
FF	SALESTAX	Sales and Use Tax	1/25/2024	0.0	0.00	0.0	
FF	SUPPLIES	Sales and Use Tax	1/25/2024	1.0	0.00	0.0	
FFO	SALESTAX	Sales and Use Tax	1/25/2024	0.0	0.00	0.0	
FFO	SUPPLIES	Sales and Use Tax	1/25/2024	0.25	0.00	0.0	
FFS	SALESTAX	Sales and Use Tax	1/25/2024	0.0	0.00	0.0	
FFS	SUPPLIES	Sales and Use Tax	1/25/2024	0.5	0.00	0.0	
SL	SALESTAX	Sales and Use Tax	1/25/2024	0.0	0.00	0.0	
SL	SUPPLIES	Sales and Use Tax	1/25/2024	1.0	0.00	0.0	

Sales Tax Report

Tax Area Code	Document Type	Document No	Gross Income	Sales Amount (Taxable)	Sales Amount (NonTaxable)	Combined Sales Tax	Combined Credit Tax	State Sales Tax	State Credit Tax	County Sales Tax	County Credit Tax	State Tax	County Tax	City Tax	Special Tax	Other Tax	Report-to
ATLANTA, GA	Invoice	103015	902.97	902.97	0.00	27.09	0.00	27.09	0.00	0.00	0.00	27.09	0.00	0.00	0.00	0.00	GA
ATLANTA, GA	Invoice	103015	9,292.05	9,292.05	0.00	278.76	0.00	278.76	0.00	0.00	0.00	278.76	0.00	0.00	0.00	0.00	GA
CHICAGO, IL	Invoice	103018	970.78	970.78	0.00	29.12	0.00	29.12	0.00	0.00	0.00	29.12	0.00	0.00	0.00	0.00	IL
MIAMI, FL	Invoice	103031	527.70	527.70	0.00	15.83	0.00	15.83	0.00	0.00	0.00	15.83	0.00	0.00	0.00	0.00	FL
MIAMI, FL	Invoice	103031	533.60	533.60	0.00	16.01	0.00	16.01	0.00	0.00	0.00	16.01	0.00	0.00	0.00	0.00	FL
CHICAGO, IL	Invoice	103019	266.26	266.26	0.00	7.99	0.00	7.99	0.00	0.00	0.00	7.99	0.00	0.00	0.00	0.00	IL
ATLANTA, GA	Invoice	103028	4,500.00	4,500.00	0.00	135.00	0.00	135.00	0.00	0.00	0.00	135.00	0.00	0.00	0.00	0.00	GA
ATLANTA, GA	Invoice	103028	557.00	557.00	0.00	11.14	0.00	11.14	0.00	0.00	0.00	11.14	0.00	0.00	0.00	0.00	GA
ATLANTA, GA	Invoice	103001	1,971.25	0.00	1,971.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	GA
ATLANTA, GA	Invoice	103001	9,462.00	0.00	9,462.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	GA
CHICAGO, IL	Invoice	103002	2,012.75	2,012.75	0.00	20.13	0.00	20.13	0.00	0.00	0.00	20.13	0.00	0.00	0.00	0.00	IL
CHICAGO, IL	Invoice	103002	7,728.96	7,728.96	0.00	77.29	0.00	77.29	0.00	0.00	0.00	77.29	0.00	0.00	0.00	0.00	IL
MIAMI, FL	Invoice	103003	2,075.00	2,075.00	0.00	20.75	0.00	20.75	0.00	0.00	0.00	20.75	0.00	0.00	0.00	0.00	FL
MIAMI, FL	Invoice	103003	6,308.00	6,308.00	0.00	63.08	0.00	63.08	0.00	0.00	0.00	63.08	0.00	0.00	0.00	0.00	FL
MIAMI, FL	Invoice	103023	768.60	0.00	768.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	FL
MIAMI, FL	Invoice	103023	1,502.30	0.00	1,502.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	FL
MIAMI, FL	Invoice	103023	190.10	0.00	190.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	FL
CHICAGO, IL	Invoice	103024	1,412.13	1,412.13	0.00	42.36	0.00	42.36	0.00	0.00	0.00	42.36	0.00	0.00	0.00	0.00	IL
T01	Invoice	103033	0.00	0.00	0.00	100.00	0.00	81.08	0.00	18.92	0.00	70.27	10.81	10.81	5.41	2.70	CA
ATLANTA, GA	Credit Memo	104001	-361.19	-361.19	0.00	0.00	-10.84	0.00	-10.84	0.00	0.00	-10.84	0.00	0.00	0.00	0.00	GA
CHICAGO, IL	Credit Memo	104002	-970.78	-970.78	0.00	0.00	-29.12	0.00	-29.12	0.00	0.00	-29.12	0.00	0.00	0.00	0.00	IL
Totals			49,649.48	35,755.23	13,894.25	944.55	-39.96	906.72	-39.96	37.84	0.00						

1.4. Alternate Ship-to Address.

These are additional fields that complement Standard Customer field "Ship-to code" to show address details for that ship-to code. Where there is no ship-to code, it defaults to customer address.

1.5. Custom Documents Report Templates.

1.5.1. Sales Document Templates

These are Custom Sales Document Reports done with additional details compared to the standard ones.

These Reports are for:

- Sales Quote
- Sales Order Confirmation
- Proforma Invoice
- Sales Shipment
- Sales Invoice
- Posted Sales Invoice
- Sales Return Order
- Sales Return Receipts
- Sales Credit Memo
- Posted Sales Credit Memo

Below is a standardized layout for these reports:

INVOICE

Cronus Armada Rental
7122 South Ashford Street
Westminster
Atlanta, GA 31772
USA
Phone No. +1 425 555 0100

Page 1 of 1

Invoice No.
103024

PO Number

Bill To:
Selangorian Ltd.
Mr. Mark McArthur
153 Thomas Drive
Chicago, IL 61236
USA

Alternate Payment Method : See footer for details
Preffered Payment Method : WIRE via Bank Account
Bank Name : World Wide Bank
Account Name :
ABA/Routing No. : 99-99-999
SWIFT Code :
Bank Account No. : 99-99-888

Ship To:
Selangorian Ltd.
Mr. Mark McArthur
153 Thomas Drive
Chicago, IL 61236
USA

Project	Document Date: 1/15/2024	Payment Terms Net 14 days	Customer Ref. 1
Department Sales	Due Date 1/29/2024	Job No.	Customer Ref. 2

Item/Description	Unit	Quantity	Unit Price	Line Amount	Discount Amount	Net Line Amount
766BC-C						
CONTOSO Storage System	Piece	1	1,455.80	1,412.13		1,455.80

Remit To :
CRONUS Systems USA, Inc.
75 Remittance Dr., Suite 6963
Chicago, IL 60675-6963,
USA

Standard terms and conditions apply

Subtotal:	1,455.80
Sales Tax (5%):	70.61
Total USD:	1,482.74
Payments & Credits	0.00
Amount Due USD:	1,482.74

1.5.2. Service Document Templates

Like Custom Sales Document Report Templates, these are Service Document Report Templates with additional details from the standard document template.

This has been implemented for the following Reports:

- Service Contract Quote
- Service Contract

In addition to Report templates, Report emailing is also added.

1.6.   Extended Global Dimensions.

This feature advances standard global dimensions 1&2 to 1.. 8 i.e. all shortcut dimensions are made global and added to Customer, Vendor, Item cards and all related transactional documents with their ledgers.

Customer:

Vendor:

Item:

It also introduces Extended Global Dimensions 9,10 and 11 which correspond to Customer, Vendor and Items which trigger a default dimension for each of the records.

You can also sync the Global Dimension 1 to 8 of master records to table fields.

1.7. Document Locking.

This provides an option to lock documents from editing. This helps avoid errors on documents by ensuring that only one user can edit a document at a time. This is an extensible feature and has already been implemented for Standard sales orders. To do so, opening the sales order, opens it on read mode only. If user wants to edit, they use the page action "Edit Order" which will lock it to them and not allow any other user to edit.

Sales Order | Work Date: 1/28/2024

1004 · The Cannon Group PLC

Process   Report   Release   Posting   Prepare   Order   Request Approval   Print/Send   Navigate   ⋯   ⓘ

General   Show more

Customer Name	The Cannon Group PLC	Requested Delivery D...	
Contact	Mr. Andy Teal	External Document No.	
Posting Date	1/28/2024	Status	**Open**
Order Date	1/28/2024	Driver No	
Due Date	2/27/2024		

Lines   Manage   More options

Type	No.	Item Reference No.	Description	Location Code	Quantit
		(There is nothing to show in this view)			

Subtotal Excl. Tax (US...	0.00	Total Excl. Tax (USD)	0.00
Inv. Discount Amount...	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	0.00

Invoice Details   Show less

Currency Code	⋯	Payment Service	No payment service is made available.
VAT Bus. Posting Gro...			
Payment Terms Code	30 DAYS		
Payment Method Code	MULTIPLE	Department Code	SALES

1004 · The Cannon Group PLC

Process   Report   Release   Posting   Prepare   Order   Request Approval   Print/Send   Navigate   ···   ⓘ

📄 Create Inventory Put-away/Pick...   ✏️ Edit Order   📄 Unlock Order

Customer Name · · · · ·	The Cannon Group PLC	Requested Delivery D... ·	
Contact · · · · · · · ·	Mr. Andy Teal	External Document No. ·	
Posting Date · · · · · ·	1/28/2024	Status · · · · · · · · ·	**Open**
Order Date · · · · · · ·	1/28/2024	Driver No · · · · · · · ·	
Due Date · · · · · · · ·	2/27/2024		

Lines   Manage   More options   📤 ⬚

Type	No.	Item Reference No.	Description	Location Code	Quantit
			(There is nothing to show in this view)		

Subtotal Excl. Tax (US... ·	0.00	Total Excl. Tax (USD) · · ·	0.00
Inv. Discount Amount... ·	0.00	Total Tax (USD) · · · · · ·	0.00
Invoice Discount % · · ·	0	Total Incl. Tax (USD) · · · ·	0.00

Invoice Details   Show less

Currency Code · · · · ·		Payment Service · · · · ·	No payment service is made available.
VAT Bus. Posting Gro... ·			
Payment Terms Code · · ·	30 DAYS		
Payment Method Code ·	MULTIPLE	Department Code · · · · ·	SALES

To allow other users to edit, the user whom the document is locked to will either close the document or use the page action "Unlock Order"
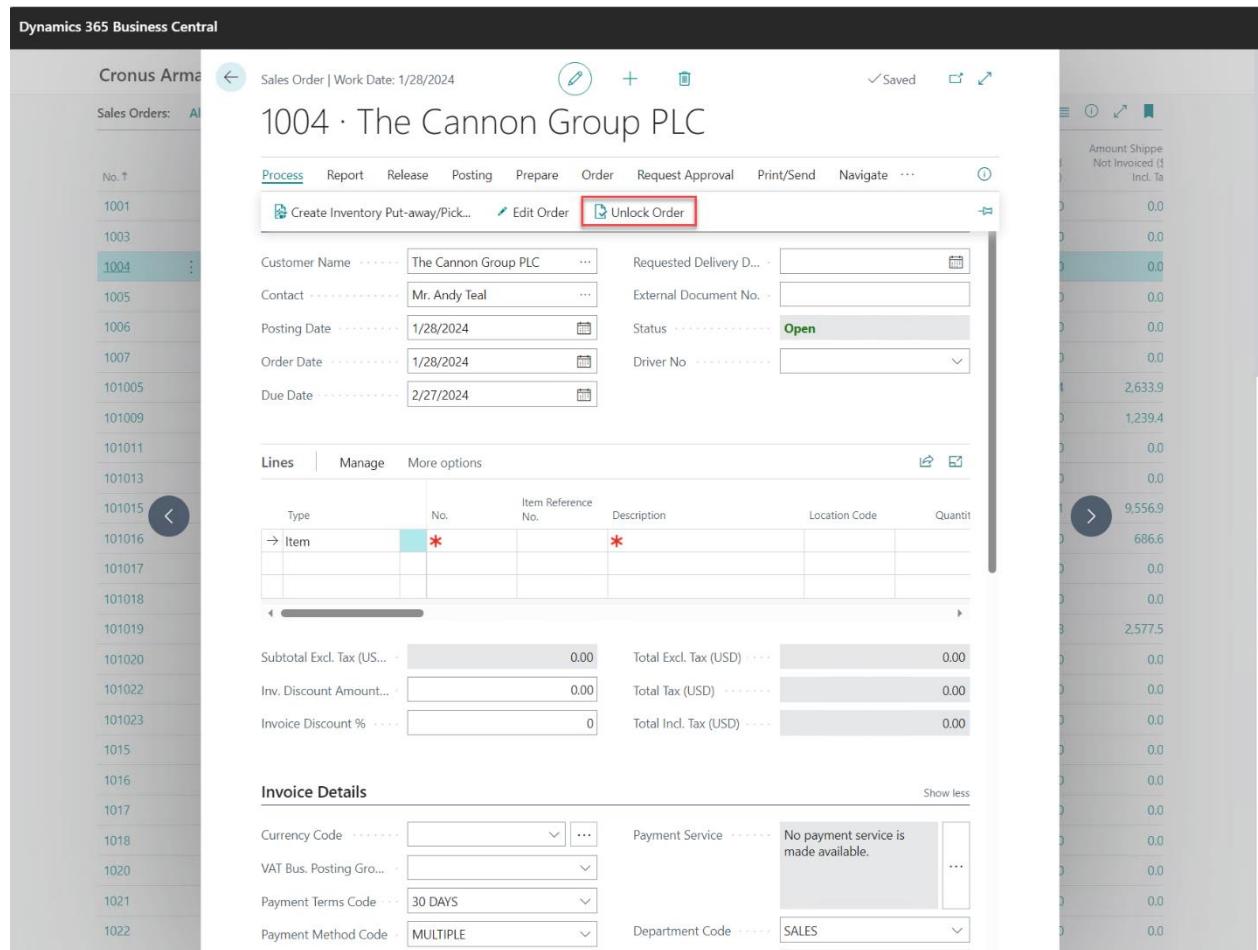
1.8.   User Driven FTP File uploads.

This provides File transmission via SFTP (Secure File Transfer Protocol).

ASP provides the functionalities below.

a. Upload files. You can Upload documents with storage multiple storage Options i.e. you can
    choose to store uploaded documents on BC app as media or on Azure Storage.
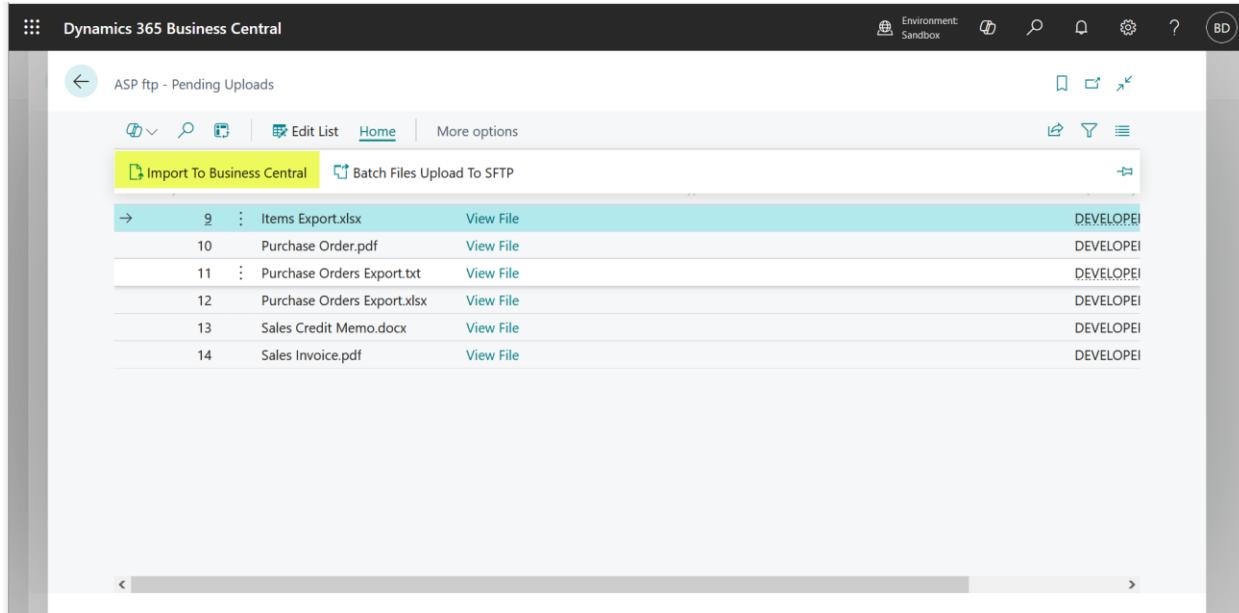
Drop a file or browse to select a file to upload. Only PDF, Word, Excel, Text, and CSV formats are allowed for import.

b. Assign imported files to either a customer or vendor before uploading them to the SFTP.

c. Batch upload files to the SFTP remote Folder.

d. Download uploaded file for review.
This can be done either manually or scheduled via a batch.
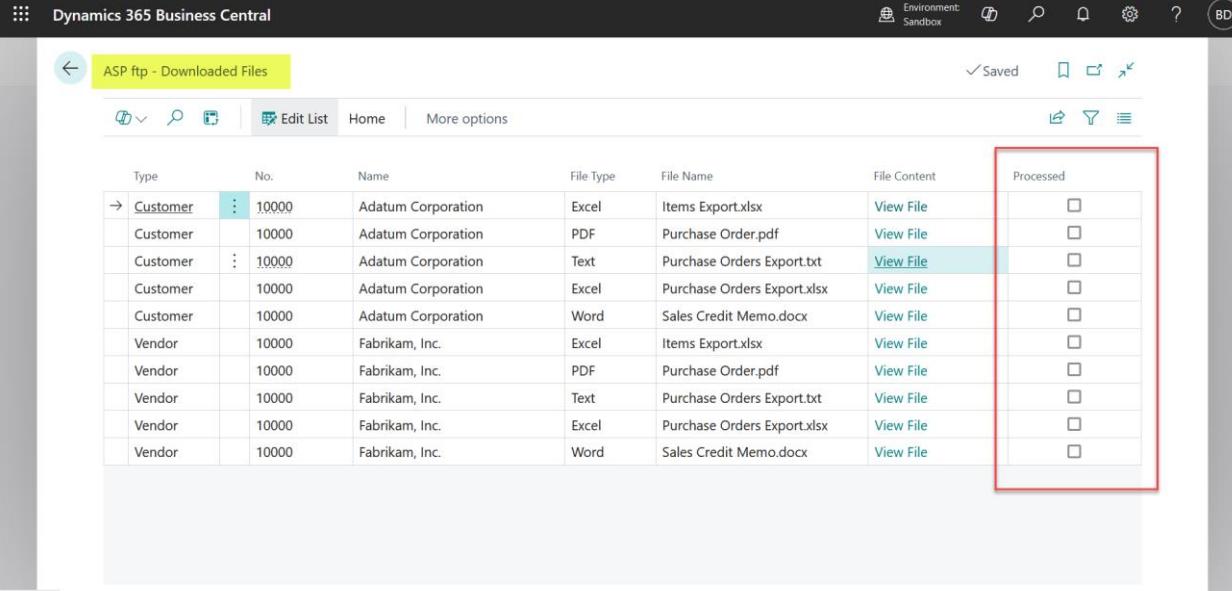
Schedule files to downloaded automatically via a batch on the job queue.

It keeps a history of the uploaded documents which you can still download.

Type	No.	Name	File Type	File Name	File Content	Processed
Vendor	20000	First Up Consultants	Excel	Items Export.xlsx	View File	☑
Vendor	20000	First Up Consultants	PDF	Purchase Order.pdf	View File	☑
Vendor	20000	First Up Consultants	Text	Purchase Orders Export.txt	View File	☑
Vendor	20000	First Up Consultants	Excel	Purchase Orders Export.xlsx	View File	☑
Vendor	20000	First Up Consultants	Word	Sales Credit Memo.docx	View File	☑
Customer	10000	Adatum Corporation	CSV	Items Export.csv	View File	☑
Vendor	10000	Fabrikam, Inc.	CSV	Items Export.csv	View File	☑
Vendor	20000	First Up Consultants	CSV	Items Export.csv	View File	☑

1.9.   Change Log Lookup

This tool adds a quick view of Change Log entries from the Master Records and Transactional

Documents which include the below:

- Customers
- Vendors
- Items
- Insurance Policies
- Machine Centers
- Fixed Assets
- Bank Accounts
- Stockkeeping Units
- Jobs
- Contacts
- Service Items
- Comments (Sales)
- Comments (Stockkeeping Units)
- Production BOMs / Production BOM
- Prod. BOM Version List
- Routings / Routing
- Routing Version List
- Work Centers
- Comments (BOM)
- Comments (Routing)
- Comments (Production Order)
- Comments (Operation – Production Order)
- Comments (Component – Production Order)
- Chart of Accounts / G/L Account Card
- Resources
- Sales Price and Line Discounts
- Item References
- Blanket Sales Orders

- Posted Sales Invoices
- Posted Sales Credit Memos
- Sales Invoices
- Sales Orders
- Sales Quotes
- Sales Return Orders
- Blanket Purchase Orders
- Purchase Credit Memos
- Purchase Invoices
- Purchase Orders
- Purchase Quotes
- Purchase Return Orders
- Service Contract Quotes
- Service Contracts
- Service Orders
- Service Invoices
- Service Credit Memos
- Posted Service Invoices
- Posted Service Credit Memos

1.10. Table Lock Analysis

This tool complements the standard Database Locks by maintaining a log of changes that caused a table lock after the table is unlocked. It can be per user or per user per record.

Database lock while change is actively running:

After the change is completed, Database lock page is cleared.
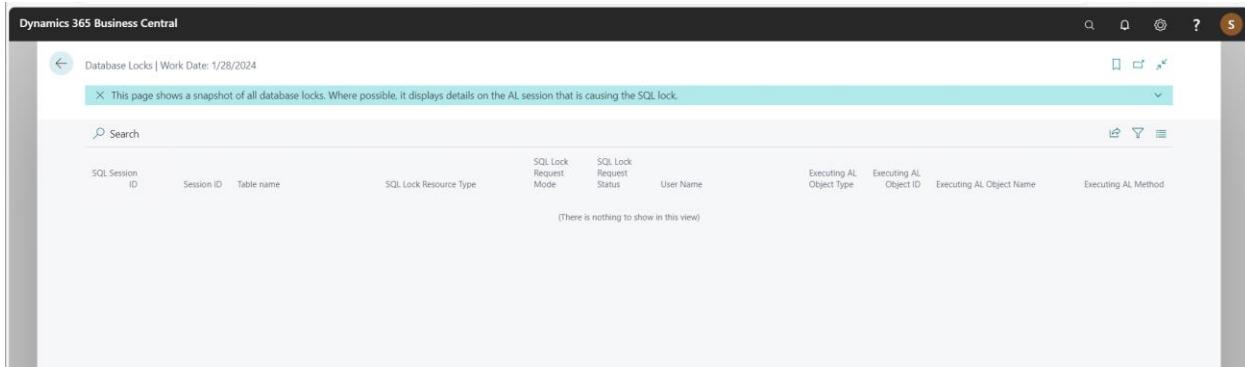
Change Log Analysis by User page will show the Change and the User after:
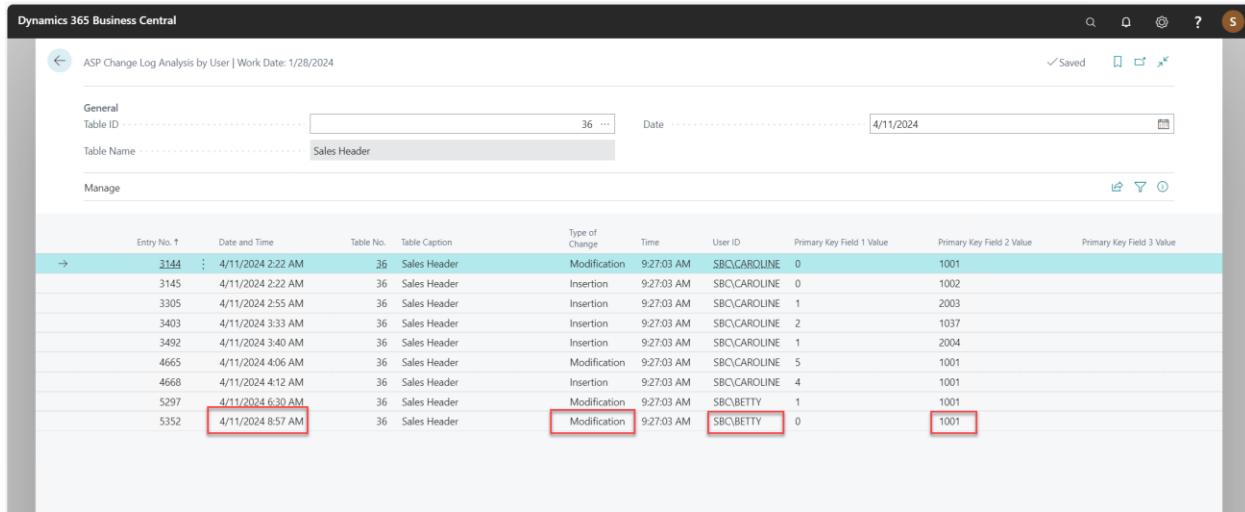
Analysis can be done for a select list of Tables (user defined) and date.

1.11. App Tracker.

This allows Tracking Business Central Extension Apps Install and Uninstall activities. This records the date, time and the user who Installed or Uninstalled an App.

Extension management Log.
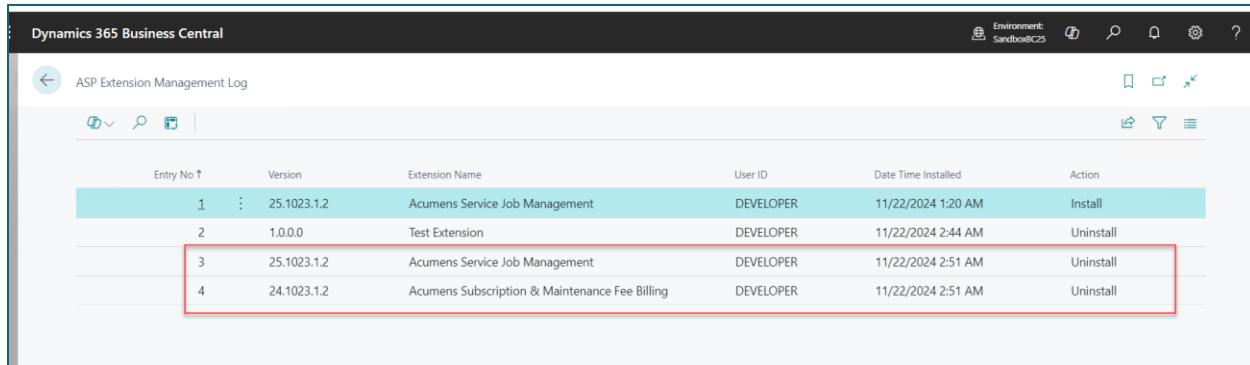
Entry No ↑	Version	Extension Name	User ID	Date Time Installed	Action
1	25.1023.1.2	Acumens Service Job Management	DEVELOPER	11/22/2024 1:20 AM	Install
2	1.0.0.0	Test Extension	DEVELOPER	11/22/2024 2:44 AM	Uninstall
3	25.1023.1.2	Acumens Service Job Management	DEVELOPER	11/22/2024 2:51 AM	Uninstall
4	24.1023.1.2	Acumens Subscription & Maintenance Fee Billing	DEVELOPER	11/22/2024 2:51 AM	Uninstall

1.12. Bank Reconciliation Module for North America.

The app retains the deprecated version of Bank Reconciliation module designed for the North America Version which was Deprecated by Microsoft.

1.13. G/L Access Permissions.

This introduces an option to restrict specific users from viewing the G/L Accounts and the General Ledger Entries. Users without the setup activated will not see the Chart of Accounts or General Ledger Entries.

1.14. Inventory Adjustment Reason Codes.

This allows users to add reason codes before posting inventory adjustment on Item journals.

If Inventory Adjustment Account is set on the reason code, then inventory adjustment entries are posted to that account.

1.15. Write-off Return Inventory.

This provides an auto-write off feature for inventory returns that cannot be reused after sale.

On posting the Return order, the returned inventory is written off.

1.16. Sales Adjustment.

This feature introduces an option to adjust specific fields on posted sales documents. This is an extension of the Standard Business Central Edit Document function with an update on the ledgers.
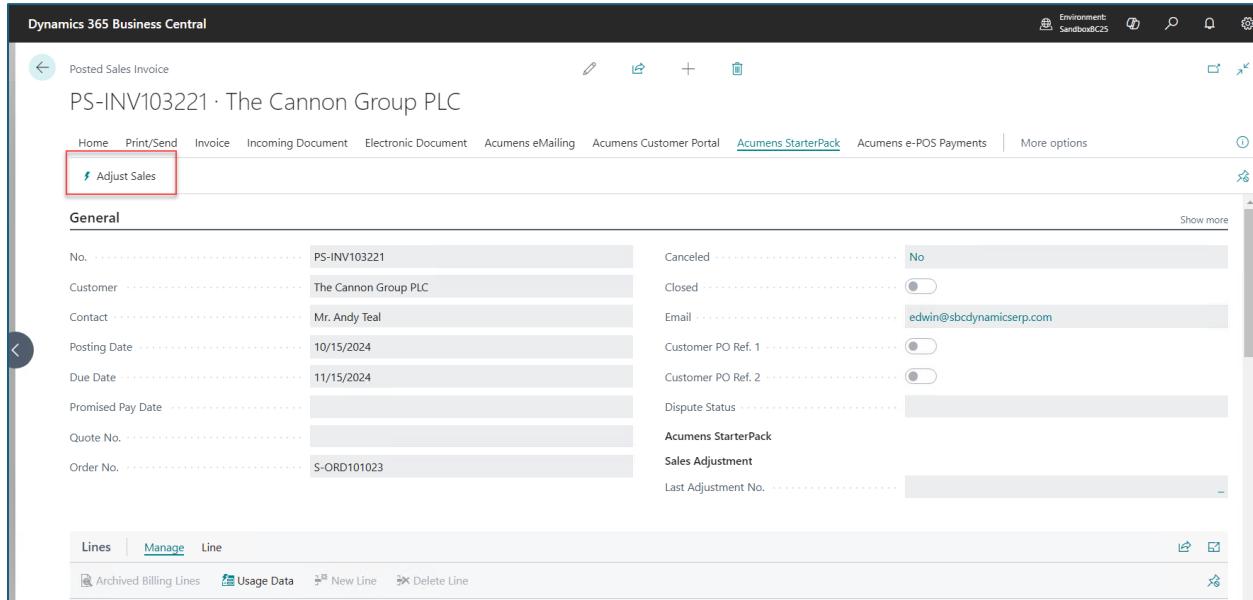
This creates a Sales Adjustment record and opens a Sales Adjustment Page. You can adjust Quantity, Unit Price, Line Discount %, Line Discount Amount, Amount, Tax Liable, VAT % and Tax Amount fields by updating the related field. Quantity field has an extra permsiions and can only be adjusted by permitted users.
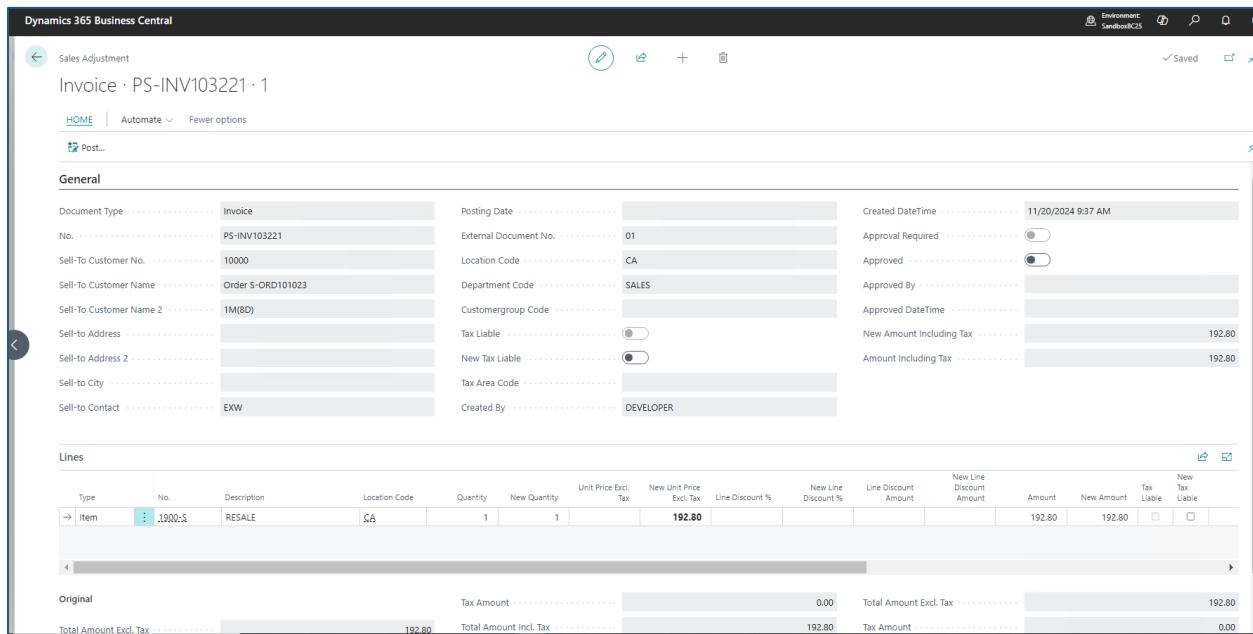
The part below will show the the original and the adjusted document Amounts.

Posted Sales Adjustment can be opened from the posted document.

Posted Entries will also show the document original and the adjustment entries.

Environment:
SandboxBC25

Detailed Customer Ledger Entries

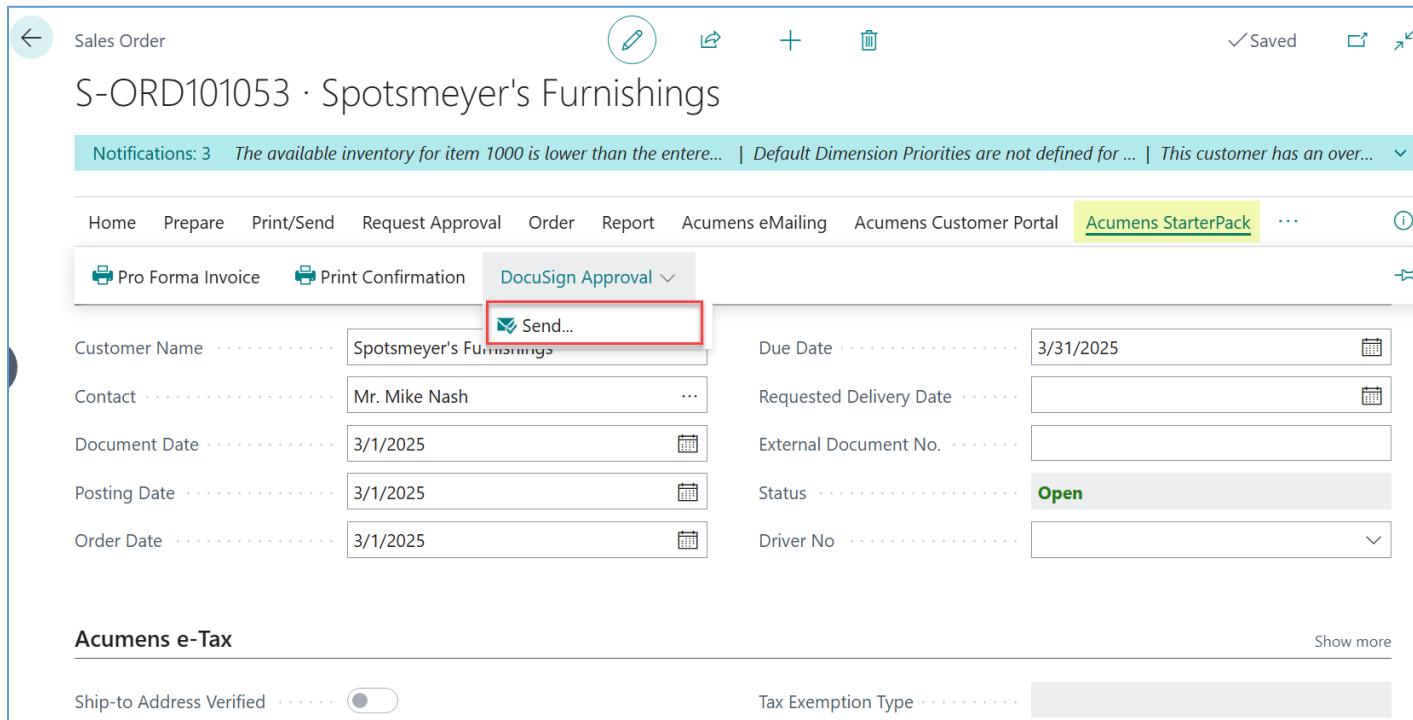Find entries... | Unapply Entries... | More options

Posting Date ↑ ▼	Entry Type	Document Type ↑ ▼	Document No. ↑	Customer No.	Currency Code	Amount	Amount ($)	Initial Entry Due Date	Entry No.
10/15/2024	Initial Entry	Invoice	PS-INV103221	10000		192.80	192.80	11/15/2024	876
10/15/2024	Initial Entry	Credit Memo	PS-INV103221	10000		-19.28	-19.28	10/15/2024	881

1.17. DocuSign Approval Process.

This process enables users to electronically send sales order or sales quote documents to customers for signature via DocuSign.

Send Approval via DocuSign.

The document will be sent for signature using the "**Send**" action.

The customer will receive the email shown below.

Test DocumentPlease sign this document

DD **DocuSign Demo System** <dse_demo@docusign.net>
To   Business Central Developer

Reply | Reply All | Forward

Mon 23/12/2024 21:01

(i) If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Business Central Developer sent you a document to review and sign.

REVIEW DOCUMENT

Business Central Developer
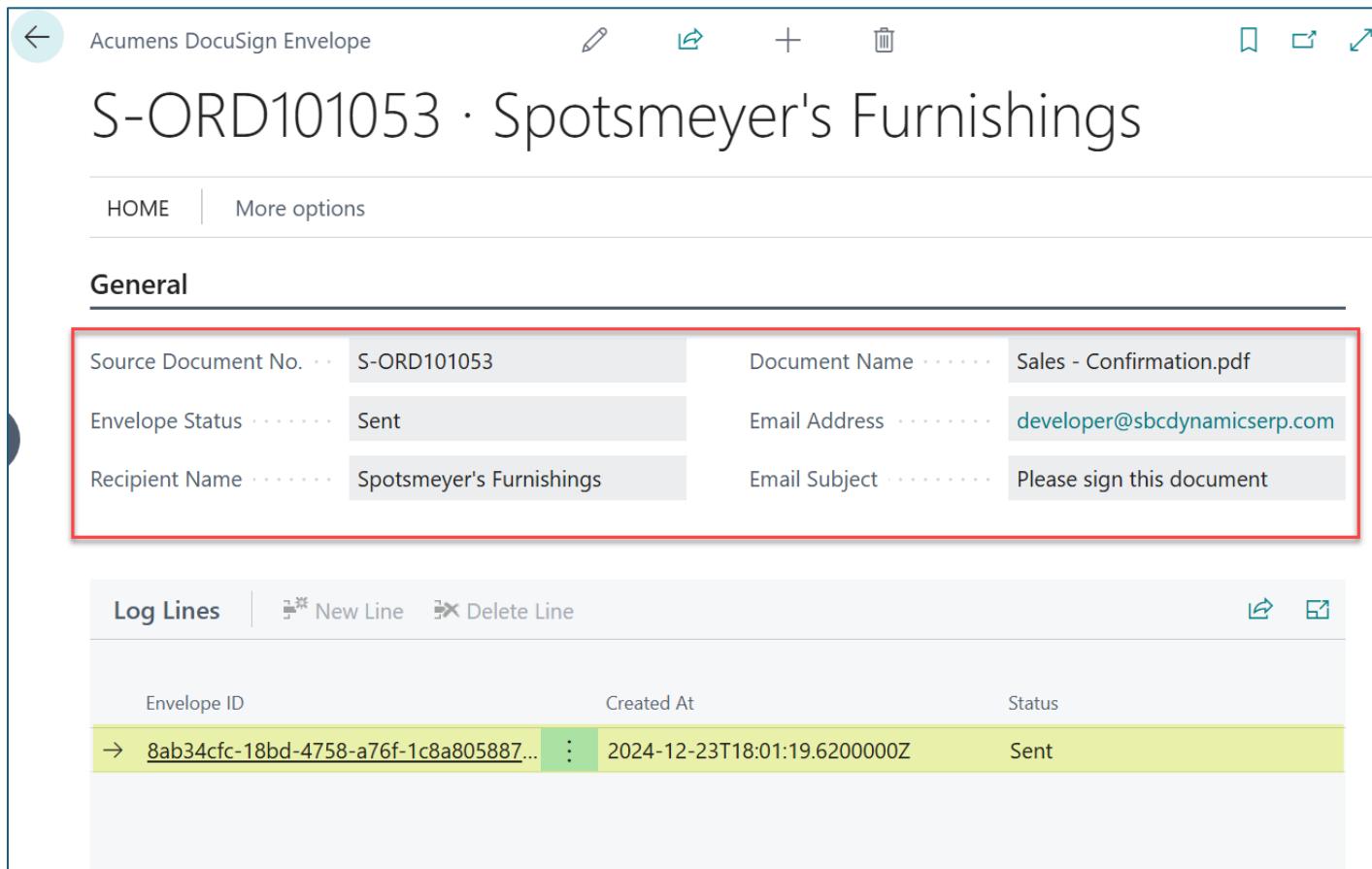developer@sbcdynamicserp.com

Spotsmeyer's Furnishings,

Complete with Docusign: Sales - Confirmation.pdf

Thank You, Business Central Developer

View DocuSign Envelope Details.
The user will be able to view the Acumens DocuSign Envelope details page, as shown below.

Append Signature.

The customer will be able to click the link sent via email and append their signature.

Print the signed document.

Users will be able to print the signed document in Business Central.

Docusign Envelope ID: 8AB34CFC-18BD-4758-A76F-1C8A80588767

cronus

Order ConfirmationS-ORD101053

March 1, 2025
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Spotsmeyer's Furnishings	CRONUS USA, Inc.
Mr. Mike Nash	7122 South Ashford Street
120 E Monterey Ave	Westminster
Pomona, CA 91767	Atlanta, GA 31772
USA	USA

External Document No.	Sales person	Quote No.	Shipment Method
	Brittany Johnsen		Ex Warehouse

No.	Description	Quantity	Unit Price Excl. Tax	Tax %	Line Amount Excl. Tax
1000	J&R Office Drawers	1 Piece	30.00	10.25	30.00

Subtotal	30.00
Invoice Discount	0.00
Total Tax	3.08
Total USD Incl. Tax	**33.08**

Signed by:

Spotsmeyer's Furnishings

E69A5261CA6C427...

Void DocuSign Approval Process.

The process can be voided using the "**Void Envelope**" action.

1.18. Mass Image Import and Export.

Allows users to run a batch process to import multiple item images either from a local directory or an Azure Blob Storage container. Images are matched with items using either the item code or barcode.

Import Images from local directory and Import Images from Azure storage.
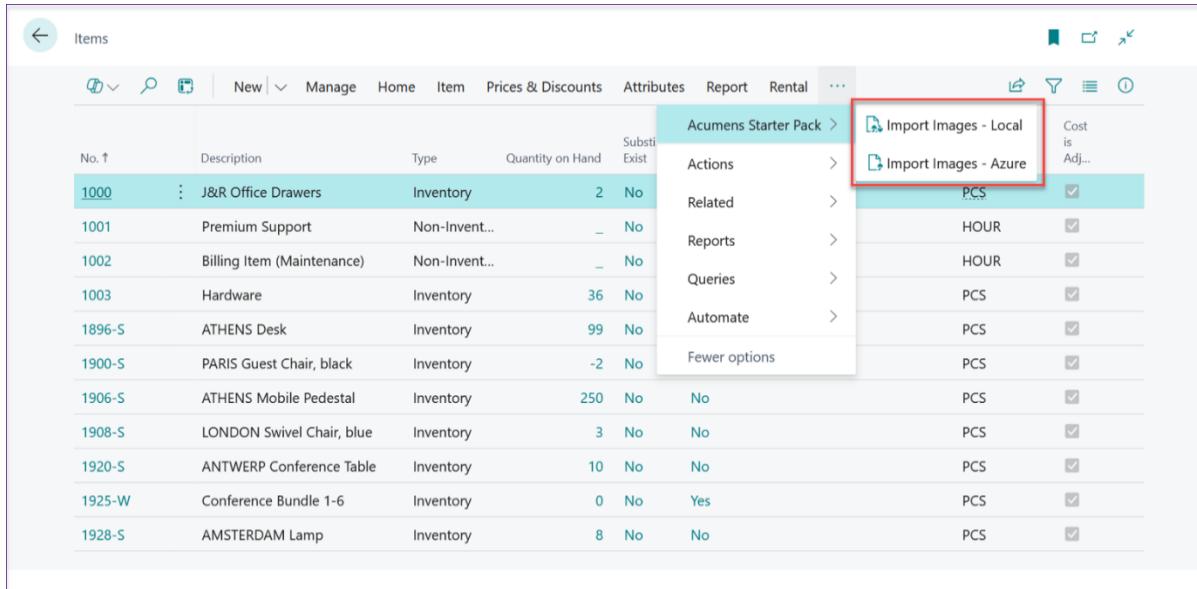
Import Images – Local: Allows users to select and upload multiple images from a local directory.

Import Images – Azure: Enables users to import multiple images from Azure Blob Storage and match them with items in Business Central.