

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.

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
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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 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

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		12.00
012	1/25/2024	Invoice 1013	12.00		12.00
013	1/25/2024	Invoice 1014	144.00		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]

London Postmaster
10 North Lake Avenue
Atlanta, GA 31772
USA

[\$*****534.00]

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:

Journals

✓ Saved

ASP Check (With Micr Code)

↗ ✕

Printer

(Handled by the browser)

▼

Report Layout

./src/layout/AQDCheckStubStubMicrCheck.rdl

...

Use default values from

Last used options and filters

▼

Options

Bank Account

CHECKING

▼

Last Check No.

199

One Check per Vendor per Document No.

☒

Reprint Checks

☐

Test Print

☐

Preprinted Stub

☐

Commit Each Check

☐

Add Second Signature

☐

Send to...

Print

Preview

Cancel

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

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/MEL/COURTNEY FRANKS/PF000/PFR000/EK000/TW000/11/19/24

DATE **1 1 1 9 2 0 2 4**
M M 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

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:

Dynamics 365 Business Central

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

Customer Ledger Entries

Create Reminder... Create Finance Charge Memo... **Apply Entries** Unapply Entries... Reverse Transaction...

Posting Date	Document Type	Document No.	Project Code	Currency Code	Original Amount	Amount	Amount (\$)	Remaining Amount	Remaining Amt. (\$)	Sales (\$)	Due Date	Discount Date	Tolerance Date
1/28/2024	Payment	G02023			-106.00	-106.00	-106.00	-106.00	-106.00	0.00	1/28/2024		
1/28/2024	Invoice	103038			106.25	106.25	106.25	106.25	106.25	100.00	2/27/2024	1/28/2024	1/28/2024
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

Dynamics 365 Business Central

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

Edit - Apply Customer Entries - 10000 - The Cannon Group PLC

General

Posting Date: 1/28/2024 Currency Code: Amount: -106.00 Remaining Amount: -106.00

Document Type: Payment

Document No.: G02023

Customer Name: The Cannon Group PLC

Process Line Entry More options

Set Applies-to ID Post Application... Preview Posting Show Only Selected Entries to Be Applied

ID	Posting Date	Type	Document No.	Customer Name	Description	Amount	Remaining Amount	Apply	to Apply	Due Date	Unapplied
	6/28/2023	Invoice	RI100010	The Cannon Group PLC	Invoice HU100016	11,760.00	11,760.00	0.00	0.00	1/28/2023	/N/A
	8/30/2023	Invoice	RI100012	The Cannon Group PLC	Invoice RO100018	11,760.00	11,760.00	0.00	0.00	8/30/2023	9/7/
	8/1/2023	Invoice	RI100011	The Cannon Group PLC	Invoice RO100017	11,760.00	11,760.00	0.00	0.00	9/1/2023	8/9/
	9/12/2023	Invoice	RI100035	The Cannon Group PLC	Invoice 1026	550.00	550.00	0.00	0.00	9/12/2023	9/20
	10/24/2023	Invoice	RI100044	The Cannon Group PLC	Invoice 1034	1,210.00	1,210.00	0.00	0.00	10/24/2023	11/1
	12/31/2023	Invoice	00-11	The Cannon Group PLC	Opening Entries, Customers	97,818.17	97,818.17	0.00	0.00	1/31/2024	1/8/
	12/31/2023	Invoice	00-16	The Cannon Group PLC	Opening Entries, Customers	52,169.68	52,169.68	0.00	0.00	1/31/2024	1/8/
	12/31/2023	Invoice	00-9	The Cannon Group PLC	Opening Entries, Customers	78,254.54	78,254.54	0.00	0.00	1/31/2024	1/8/
	1/7/2024	Invoice	103015	The Cannon Group PLC	Order 101001	10,806.72	10,806.72	0.00	0.00	2/4/2024	1/12
	1/17/2024	Invoice	103028	The Cannon Group PLC	Order 6005	5,354.85	5,354.85	0.00	0.00	2/17/2024	1/25
	1/22/2024	Invoice	103001	The Cannon Group PLC	Invoice 103001	11,776.25	11,776.25	0.00	0.00	2/22/2024	1/30
→ SBC/BETTY	1/28/2024	Invoice	103038	The Cannon Group PLC	Order 1012	106.25	106.25	106.25	106.25	2/27/2024	1/28
	1/28/2024	Invoice	RI100007	The Cannon Group PLC	Invoice RO100011	18,120.00	18,120.00	0.00	0.00	2/28/2024	2/5/
	1/28/2024	Invoice	RI100008	The Cannon Group PLC	Invoice RO100012	11,760.00	11,760.00	0.00	0.00	2/28/2024	2/5/
	1/28/2024	Invoice	RI100036	The Cannon Group PLC	Invoice RO100041	4,219.88	4,219.88	0.00	0.00	2/28/2024	2/5/
	1/28/2024	Invoice	103033	The Cannon Group PLC	Order 1002	4,370.00	4,370.00	0.00	0.00	2/28/2024	2/5/
	1/28/2024	Invoice	103034	The Cannon Group PLC	Order 1008	106.25	106.25	0.00	0.00	2/28/2024	2/5/

Appln. Currency	Amount to Apply	Pmt. Disc. Amount	Rounding	Applied Amount	Available Amount	Balance
	106.25	0.00	0.00	106.25	-106.00	0.25

Close

Dynamics 365 Business Central

2375 | Work Date: 1/28/2024

Detailed Customer Ledger Entries

Posting Date	Entry Type	Document Type	Document No.	Customer No.	Currency Code	Amount	Amount (\$)	Initial Entry Due Date	Entry No. 1
1/28/2024	Initial Entry	Payment	G02023	10000		-106.00	-106.00	1/28/2024	222
1/28/2024	Payment Tolerance	Payment	G02023	10000		-0.25	-0.25	1/28/2024	225
1/28/2024	Application	Payment	G02023	10000		106.25	106.25	1/28/2024	227

Overpayment:

Dynamics 365 Business Central

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

Customer Ledger Entries

Create Reminder... Create Finance Charge Memo... **Apply Entries** Unapply Entries... Reverse Transaction...

Posting Date	Document Type	Document No.	Project Code	Currency Code	Original Amount	Amount	Amount (\$)	Remaining Amount	Remaining Amt. (\$)	Sales (\$)	Due Date	Discount Date	Tolerance Date
1/28/2024	Payment	G02022			-107.00	-107.00	-107.00	-107.00	-107.00	0.00	1/28/2024		
1/28/2024	Invoice	103037			106.25	106.25	106.25	106.25	106.25	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

Dynamics 365 Business Central

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

Edit - Apply Customer Entries - 10000 - The Cannon Group PLC

General

Posting Date: 1/28/2024

Document Type: Payment

Document No.: G02022

Customer Name: The Cannon Group PLC

Currency Code:

Amount: -107.00

Remaining Amount: -107.00

Process Line Entry More options

Set Applies-to ID **Post Application...** Preview Posting Show Only Selected Entries to Be Applied

Applies-to ID	Posting Date	Type	Document No.	Customer Name	Description	Amount	Amount (\$)	Apply	to Apply	Due Date	Discount Date
	8/30/2023	Invoice	RI100012	The Cannon Group PLC	Invoice RI100012	11,760.00	11,760.00	0.00	0.00	8/30/2023	9/11/2023
	8/1/2023	Invoice	RI100011	The Cannon Group PLC	Invoice RI100011	11,760.00	11,760.00	0.00	0.00	9/1/2023	8/9/2023
	9/12/2023	Invoice	RI100035	The Cannon Group PLC	Invoice 1026	550.00	550.00	0.00	0.00	9/12/2023	9/20/2023
	10/24/2023	Invoice	RI100044	The Cannon Group PLC	Invoice 1034	1,210.00	1,210.00	0.00	0.00	10/24/2023	11/1/2023
	12/31/2023	Invoice	00-11	The Cannon Group PLC	Opening Entries, Customers	97,818.17	97,818.17	0.00	0.00	1/31/2024	1/8/2024
	12/31/2023	Invoice	00-16	The Cannon Group PLC	Opening Entries, Customers	52,169.68	52,169.68	0.00	0.00	1/31/2024	1/8/2024
	12/31/2023	Invoice	00-9	The Cannon Group PLC	Opening Entries, Customers	78,254.54	78,254.54	0.00	0.00	1/31/2024	1/8/2024
	1/7/2024	Invoice	103015	The Cannon Group PLC	Order 101001	10,806.72	10,806.72	0.00	0.00	2/4/2024	1/12/2024
	1/17/2024	Invoice	103028	The Cannon Group PLC	Order 6005	5,354.85	5,354.85	0.00	0.00	2/17/2024	1/25/2024
	1/22/2024	Invoice	103001	The Cannon Group PLC	Invoice 103001	11,776.25	11,776.25	0.00	0.00	2/22/2024	1/30/2024
→ SBC/BETTY	1/28/2024	Invoice	103037	The Cannon Group PLC	Order 1011	106.25	106.25	106.25	106.25	2/27/2024	1/28/2024
	1/28/2024	Invoice	103038	The Cannon Group PLC	Order 1012	106.25	106.25	0.00	0.00	2/27/2024	1/28/2024
	1/28/2024	Invoice	RI100007	The Cannon Group PLC	Invoice RI100007	18,120.00	18,120.00	0.00	0.00	2/28/2024	2/5/2024
	1/28/2024	Invoice	RI100008	The Cannon Group PLC	Invoice RI100008	11,760.00	11,760.00	0.00	0.00	2/28/2024	2/5/2024
	1/28/2024	Invoice	RI100036	The Cannon Group PLC	Invoice RI100036	4,219.88	4,219.88	0.00	0.00	2/28/2024	2/5/2024
	1/28/2024	Invoice	103033	The Cannon Group PLC	Order 1002	4,370.00	4,370.00	0.00	0.00	2/28/2024	2/5/2024
	1/28/2024	Invoice	103034	The Cannon Group PLC	Order 1008	106.25	106.25	0.00	0.00	2/28/2024	2/5/2024

Appl. Currency Amount to Apply Pmt. Disc. Amount Rounding Applied Amount Available Amount Balance

106.25 0.00 0.00 106.25 -107.00 -0.75

Close

Dynamics 365 Business Central													
10000 - The Cannon Group PLC Work Date: 1/28/2024													
Customer Ledger Entries													
Posting Date	Document Type	Document No.	Project Code	Currency Code	Original Amount	Amount	Amount (\$)	Remaining Amount	Remaining Amt. (\$)	Sales (\$)	Due Date	Pmt. Disc. 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									
Posting Date	Entry Type	Document Type	Document No.	Customer No.	Currency Code	Amount	Amount (\$)	Initial Entry Due Date	Entry No. 1
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

Dynamics 365 Business Central

Service Contract Quote | Work Date: 1/28/2024

SC00004 · Prepaid Contract - Hardware

Process Report Acumens StarterPack More options

General Show more

Contract No. SC00004 Phone No. Email Contract Group Code 30000 Salesperson Code JO Quote Type Quote 1 Starting Date 2/1/2024 Status Responsibility Center Change Status Open

Sell-to

Name John Haddock Insurance Co. Address 10 High Tower Green Address 2 City Miami State FL ZIP Code 37125 Country/Region Code US Contact Name Miss Patricia Doyle

Lines Manage More options

Service Item No.	Unit of Measure Code	Serial No.	Item No.	Response Time (Hours)	Line Cost	Line Value	Line Discount %	Line Amount	Amount Including Tax	Tax Group Code	Tax Liabile	Tax Area	Profit	Last Date
→ 9	PCS	SP986543	80003	24	1.89	3.70		3.70	3.70	NONTAXABLE	<input checked="" type="checkbox"/>	ATLANTA, GA	1.81	
10	PCS	M890000	80004	24	2.16	4.00		4.00	4.37	SUPPLIES	<input checked="" type="checkbox"/>	ATLANTA, GA	1.84	
2000-S-2	PCS		8904-W	16		15.10	10	13.59	14.71	LABOR	<input checked="" type="checkbox"/>	ATLANTA, GA	13.59	

Service Contract.

Dynamics 365 Business Central

Service Contract | Work Date: 1/28/2024

SC00014 · Prepaid Contract - Hardware

Process Report Approve Release Acumens StarterPack Actions Related Reports Fewer options

General Show more

Contract No. SC00014 Phone No. Email CustomerService@sbcdynamicserp.com Contract Group Code Salesperson Code BC Starting Date 1/28/2024 Status Signed Responsibility Center BIRMINGHAM Change Status Locked

Name The Cannon Group PLC Address 192 Market Square Address 2 City Atlanta State GA ZIP Code 31772 Country/Region Code US Contact Name Mr. Andy Teal

Lines Manage Line Fewer options

Service Item No.	Item No.	Response Time (Hours)	Line Cost	Line Value	Line Discount %	Line Amount	Amount Including Tax	Tax Group Code	Tax Liabile	Tax Area	Profit	Service Period	Next Planned Service Date	Starting Date
→ 1	80001	8	1.35	2.90		2.90	3.17	SUPPLIES	<input checked="" type="checkbox"/>	ATLANTA, GA	1.55	3M	1/28/2024	1/28/2024

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:

←

Item Card | Work Date: 1/28/2024

+

✓ Saved

1110 · Rim

Process

Approve

Posting

Order

Acumens StarterPack

Actions

Related

Reports

Fewer options

* Costs & Posting >

1.05

RETAIL

FINISHED

Prices & Sales >

0.00

Replenishment >

Purchase

Planning >

Fixed Reorder Qty.

None

Item Tracking >

Warehouse >

Acumens StarterPack

Extended Global Dimension

Department Code

Project Code

Customergroup Code

Area Code

Businessgroup Code

Salescampaign Code

Salesperson Code

Purchaser Code

Taxability

Product Taxability

Resource Filter Type

Taxability Product Filter

Ship-to State Filter

Resource:

←

Resource Card | Work Date: 1/28/2024

+

✓ Saved

KATHERINE · Katherine Hull

Process

Report

Approve

Release

Posting

Prepare

Acumens StarterPack

More options

General >

Person

HOURL

Invoicing >

LABOR

SERVICES

Personal Data >

Acumens StarterPack

Taxability

Resource Taxability Standard

Product Filter Type

Taxability Resource Filter

Auto-add to Order

Ship-to State Filter

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.

Dynamics 365 Business Central

SalesTax Settlement Journal | Work Date: 1/28/2024

Search Sales Tax

SalesTax Periods Generate SalesTax Report Close Entries

Batch Name SALESTAX

Entry No	Tax Jurisdiction Code	Description	Document Type	Document No	Report-to State	Report-to County	Customer No	Posting Date	Tax Group Code	VAT Business Posting Group	EQM Ref...	Tax Area Code	Tax Liabile	Description
1	GA	ATLANTA, GA	Invoice	RI100003	GA	GAFULTON	10000	3/30/2023	MATERIALS			ATLANTA, GA		ATLANTA, GA
2	GA	ATLANTA, GA	Invoice	RI100003	GA	GAFULTON	10000	3/30/2023	MATERIALS			ATLANTA, GA		ATLANTA, GA
3	GA	ATLANTA, GA	Credit Memo	RCM200000	GA	GAFULTON	10000	3/1/2023	MATERIALS			ATLANTA, GA		ATLANTA, GA
4	GA	ATLANTA, GA	Credit Memo	RCM200002	GA	GAFULTON	10000	3/30/2023	MATERIALS			ATLANTA, GA		ATLANTA, GA
5	GA	ATLANTA, GA	Credit Memo	RCM200002	GA	GAFULTON	10000	3/30/2023	MATERIALS			ATLANTA, GA		ATLANTA, GA

Sample Report Output:

AutoSave

SalesTax_000123_003123 (3).xlsx

Saved to this PC

Search

Betty Chebet Too

Comments

Share

FileHomeInsertDrawPage LayoutFormulasDataReviewViewAutomateDeveloperHelp

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Reported Entries are closed using the page action below:

Sales Tax Settlement Journal | Work Date: 1/28/2024

Search Sales Tax

Sales Tax Periods Generate Sales Tax Report **Close Entries**

Batch Name SALESTAX

Entry No.	Tax Jurisdiction Code	Description	Document Type	Document No.	Report-to State	Report-to County	Customer No.	Posting Date	Tax Group Code	VAT Business Posting Group	EQM Ret...	Tax Area Code	Tax Liab	Description
1	GA	ATLANTA, GA	Invoice	RI100003	GA	GAFULTON	10000	3/30/2023	MATERIALS			ATLANTA, GA		ATLANTA, GA
2	GA	ATLANTA, GA	Invoice	RI100003	GA	GAFULTON	10000	3/30/2023	MATERIALS			ATLANTA, GA		ATLANTA, GA
3	GA	ATLANTA, GA	Credit Memo	RCM200000	GA	GAFULTON	10000	3/1/2023	MATERIALS			ATLANTA, GA		ATLANTA, GA
4	GA	ATLANTA, GA	Credit Memo	RCM200002	GA	GAFULTON	10000	3/30/2023	MATERIALS			ATLANTA, GA		ATLANTA, GA
5	GA	ATLANTA, GA	Credit Memo	RCM200002	GA	GAFULTON	10000	3/30/2023	MATERIALS			ATLANTA, GA		ATLANTA, GA

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:

Posted Sales Invoice | Work Date: 1/25/2024

103033 · ST Customer

Process Invoice Correct Print/Send Navigate Electronic Document Actions Related Fewer options

General

No. 103033 Quote No. Order No. 1003

Customer ST Customer Canceled No

Contact

Posting Date 1/25/2024 Closed

Due Date 2/25/2024

Lines	Manage	Line	Fewer options										
Type	No.	Item Reference No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Deferral Code	D
→ G/L Account	63400		Sales Tax	1		100.00	101	SALESTAX		100.00	100.00		

Invoice Discount Amount Excl. Tax	0.00	Total Tax (USD)	0.00
Total Excl. Tax (USD)	100.00	Total Incl. Tax (USD)	100.00

Tax Details:

Dynamics 365 Business Central

?

🔍

🔄

🏠

←

Tax Details | Work Date: 1/25/2024

🔍

+ New

📝 Edit List

🗑️ Delete

More options

🔍

🔼

☰

Tax Jurisdiction Code ↑	Tax Group Code ↑	Tax Type ↑	Effective Date 1 ▼	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

AutoSave

SalesTax_010124_013124.xlsx

Search

FileHomeInsertDrawPage LayoutFormulasDataReviewViewAutomateDeveloperHelp

CutCopyPasteFormat PainterClipboard

Aptos Narrow11A'

BIUL

Font

Wrap Text

Text

Conditional Formatting

Format as Table

Cell Styles

InsertDeleteFormat

AutoSumFillClear

Sort & Filter

Find & Select

Sensitivity

Add-ins

Analysis Data

Alignment

Number

Styles

Cells

Editing

Sensitivity

Add-ins

CommentsShare

A20

</

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.

Customer Card | Work Date: 1/28/2024

+

✓ Saved

10000 · The Cannon Group PLC

ProcessNew DocumentApproveRequest ApprovalPrices & DiscountsNavigateCustomer

Preferred Pay By

Exemption Customer

Sell-to

Preferred Payment M...

None

National Sale-Tax Exe...

Alternate Pay By

Market Place

Alternate Payment M...

None

Balances

Extended Global Dimension

Balance

367,186.23

Balance (\$)

367,186.23

Net Change

367,186.23

Net Change (\$)

367,186.23

Sales (\$)

178,493.38

Profit (\$)

158,425.08

Inv. Discounts (\$)

1,119.32

Pmt. Discounts (\$)

0.00

Balance Due

59,689.89

Balance Due (\$)

59,689.89

Payments

273,074.19

Invoice Amounts

685,127.53

Cr. Memo Amounts

44,812.86

Finance Charge Mem...

0.00

Payments (\$)

273,074.19

Inv. Amounts (\$)

685,127.53

Ship-to Code

PARK ROAD

Ship-to Name

The Cannon Group PLC

Ship-to Name 2

Ship-to Address

10 Park Road

Ship-to Address 2

Ship-to City

Atlanta

Ship-to County

GA

Ship-to Post Code

31772

Ship-to Country/Regi...

Inv. Amounts (\$)

44,812.86

Specifies the value of the Inv. Amounts (\$) field.

Learn more

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:



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

INVOICE

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

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

e-Mail questions about billing to billing@cronususa.com

Check our products and services at www.cronususa.com

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.

The screenshot displays the Dynamics 365 Business Central interface for a Service Contract. The title bar shows 'Dynamics 365 Business Central' and a search icon. The main header area includes a back arrow, 'Service Contract | Work Date: 1/28/2024', and icons for edit, add, and delete. Below this, the contract details are shown: 'SC00002 · Prepaid Contract - Hardware'. A navigation bar contains tabs: 'Process', 'Report', 'Approve', 'Release', 'Acumens StarterPack', 'Actions', 'Related', 'Reports', and 'Fewer options'. The 'Send by Email' button is highlighted with a red box. The form is divided into two columns of fields. The left column includes: Contract No. (SC00002), Description (Prepaid Contract - Hardware), Customer No. (10000), Contact No. (CT000008), Name (The Cannon Group PLC), Address (192 Market Square), Address 2, City (Atlanta), State (GA), ZIP Code (31772), Country/Region Code (US), and Contact Name (Mr. Andy Teal). The right column includes: Phone No., Email, Contract Group Code, Salesperson Code (JO), Starting Date (6/30/2023), Status (Signed), Responsibility Center, and Change Status (Locked).

Field	Value
Contract No.	SC00002
Description	Prepaid Contract - Hardware
Customer No.	10000
Contact No.	CT000008
Name	The Cannon Group PLC
Address	192 Market Square
Address 2	
City	Atlanta
State	GA
ZIP Code	31772
Country/Region Code	US
Contact Name	Mr. Andy Teal
Phone No.	
Email	
Contract Group Code	
Salesperson Code	JO
Starting Date	6/30/2023
Status	Signed
Responsibility Center	
Change Status	Locked

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:

Dynamics 365 Business Central

Customer Card | Work Date: 1/28/2024

10000 · The Cannon Group PLC

Process New Document Approve Request Approval Prices & Discounts Navigate Customer More options

Statistics >

Acumens StarterPack

Sales Document Templates

Preferred Pay By
Preferred Payment Method None
Alternate Pay By
Alternate Payment Method None

Extended Global Dimension

Department Code SALES
Project Code
Customergroup Code
Area Code
Businessgroup Code
Salescampaign Code
Salesperson Code
Purchaser Code

Balances

Balance	363,186.23
Balance (\$)	363,186.23
Net Change	363,186.23
Net Change (\$)	363,186.23
Sales (\$)	174,493.38
Profit (\$)	154,775.68
Inv. Discounts (\$)	1,119.32
Print. Discounts (\$)	0.00
Balance Due	59,689.89
Balance Due (\$)	59,689.89
Payments	273,074.19
Invoice Amounts	681,127.53
Cr. Memo Amounts	44,812.86
Finance Charge Memo Amounts	0.00
Payments (\$)	273,074.19
Inv. Amounts (\$)	681,127.53
Cr. Memo Amounts (\$)	44,812.86
Fin. Charge Memo Amounts (\$)	0.00

Vendor:

Dynamics 365 Business Central

Vendor Card | Work Date: 1/28/2024

Search + New Manage Process

No. 1

Name

01254796 Progressive Home Furnishings

01587796 Custom Metals Incorporated

01863656 American Wood Exports

01905283 Mundersand Corporation

01905382 NewCaSup

01905777 OakvilleWorld

10000 London Postmaster

20000 AR Day Property Management

20300190 Malay-Dan Export Unit Sdn Bhd

20319939 KDHS199 Sdn Bhd

20323323 Tengah Butong Sdn Bhd

21201992 Texpro Maroc

21218838 Top Bureau

21248839 Comacyle

27299299 Big 5 Video

27833998 Jewel Gold Mine

27889998 Mountain Fisheries

30000 CoolWood Technologies

31147896 Houtindustrie Bruynisma

31568974 Koekamp Leerindustrie

31580305 Beekhuysen BV

32456123 Groene Kater BVBA

32554455 PURE-LOOK

Vendor Card | Work Date: 1/28/2024

10000 · London Postmaster

Process Report Request Approval New Document Navigate Vendor More options

General > London Postmaster

Address & Contact > 31772 Mrs. Carol Philips

Invoicing >

Payments > CM

Receiving > CIF

Acumens StarterPack

Department Code

Project Code

Customergroup Code

Area Code

Businessgroup Code

Salescampaign Code

Salesperson Code

Purchaser Code

Attachments (0)

Statistics

10000

165,994.00

1,392.00

0.00

0.00

167,386.00

126,278.59

0.00

111,329.64

0.00

1/10/2024

Vendor History

10000

0 0 1

Blanket Orders Orders

0 0 0

Return Orders Credit Memo

0 4 4

Item:

Dynamics 365 Business Central

Item Card | Work Date: 1/28/2024

Items: All Search

No. 1

Description

1000 Bicycle

1001 Touring Bicycle

1100 Front Wheel

1110 Rim

1120 Spokes

1150 Front Hub

1151 Axle Front Wheel

1155 Socket Front

1160 Tire

1170 Tube

1200 Back Wheel

1250 Back Hub

1251 Axle Back Wheel

1255 Socket Back

1300 Chain Assy

1310 Chain

1320 Chain Wheel Front

1330 Chain Wheel Back

1400 Mudguard front

1450 Mudguard back

1500 Lamp

1600 Bell

1700 Brake

1710 Hand rear wheel

Item Card | Work Date: 1/28/2024

1000 · Bicycle

If you want, we can assign attributes based on the images you import for items and contact... Enab... | Don't ask aga... >

Process Item Prices & Discounts Request Approval More options

Inventory > 31

* Costs & Posting > 350.595 RETAIL MATERIALS FINISHED

Prices & Sales > 4,000.00

Replenishment > Prod. Order

Planning > Fixed Reorder Qty. None

Item Tracking >

Warehouse >

Acumens StarterPack

Department Code

Project Code

Customergroup Code

Area Code

Businessgroup Code

Salescampaign Code

Salesperson Code

Purchaser Code

Attachments (0)

Invoicing

1000

Standard

No

350.595

350.595

0.00

0

4,000.00

91.23513

4,000.00

Planning

1000

Fixed Reorder Qty.

0

0

0

0

1W

0

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.

Dynamics 365 Business Central

Work Date: 1/28/2024

Extended Global Dimension Setup

Cronus Armada Rental

Items: All

1000 Bicycle

1001 Touring Bicycle

1100 Front Wheel

1110 Rim

1120 Spokes

1150 Front Hub

1151 Axle Front Wheel

1155 Socket Front

1160 Tire

1170 Tube

Customer Dim Code

CUSTOMER

Vendor Dim Code

VENDOR

Item Dim Code

ITEMCODE

Customer Sync Fields

Vendor Sync Fields

Item Sync Fields

Attachments (0)

1000 Standard No No 350.595 350.595 0.00 0 4,000.00

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

Work Date: 1/28/2024

+

✓ Saved

Extended Global Dimension Setup

General >

Customer Sync Fields

Manage

	Global Dimension No: ↑		Description
	GLOBAL 1		Gen. Bus. Posting Group
	GLOBAL 2		
	GLOBAL 3		
	GLOBAL 4		
	GLOBAL 5		
	GLOBAL 6		
	GLOBAL 7		
→	GLOBAL 8	⋮	

Vendor Sync Fields

Manage

	Global Dimension No: ↑		Description
	GLOBAL 1		
	GLOBAL 2		
	GLOBAL 3		
	GLOBAL 4		
	GLOBAL 5		
	GLOBAL 6		
	GLOBAL 7		
→	GLOBAL 8	⋮	

Item Sync Fields

Manage

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

ProcessReportReleasePostingPrepareOrderRequest ApprovalPrint/SendNavigate...

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



Sales Order | Work Date: 1/28/2024





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	Quantity		
(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”

Dynamics 365 Business Central

Cronus Arma Sales Order | Work Date: 1/28/2024

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	Quantity
→ Item	*		*		

Subtotal Excl. Tax (USD) 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

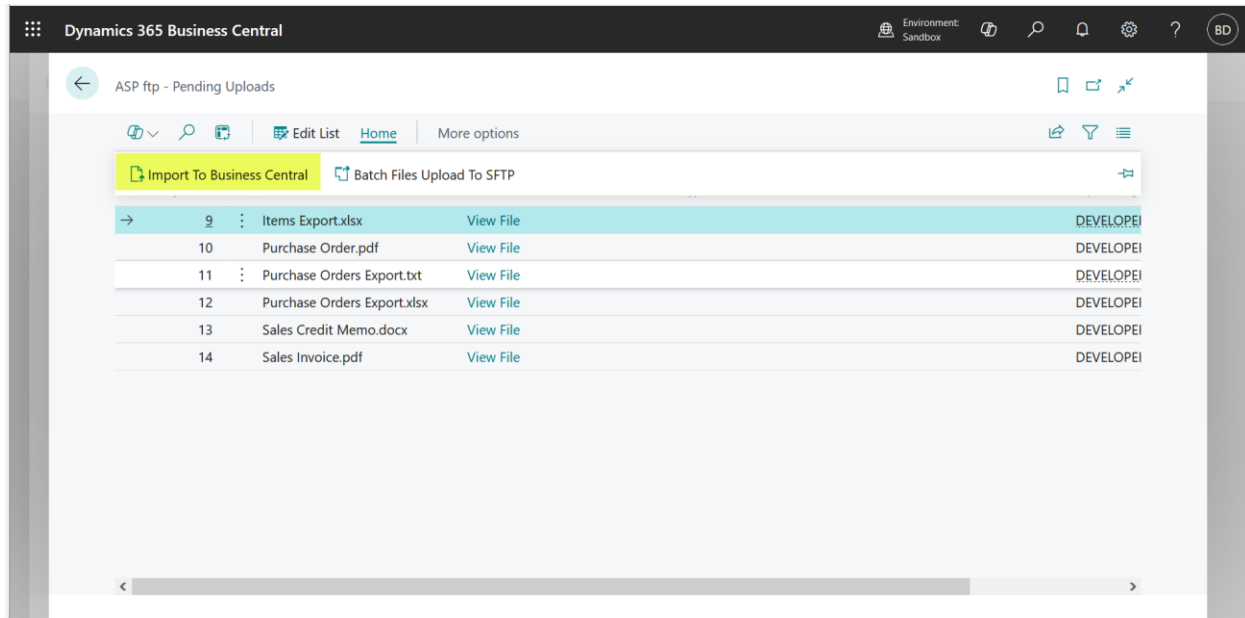
Currency Code VAT Bus. Posting Gro... Payment Service No payment service is made available.
Payment Terms Code 30 DAYS Department Code SALES
Payment Method Code MULTIPLE

1.8. User Driven FTP File uploads.

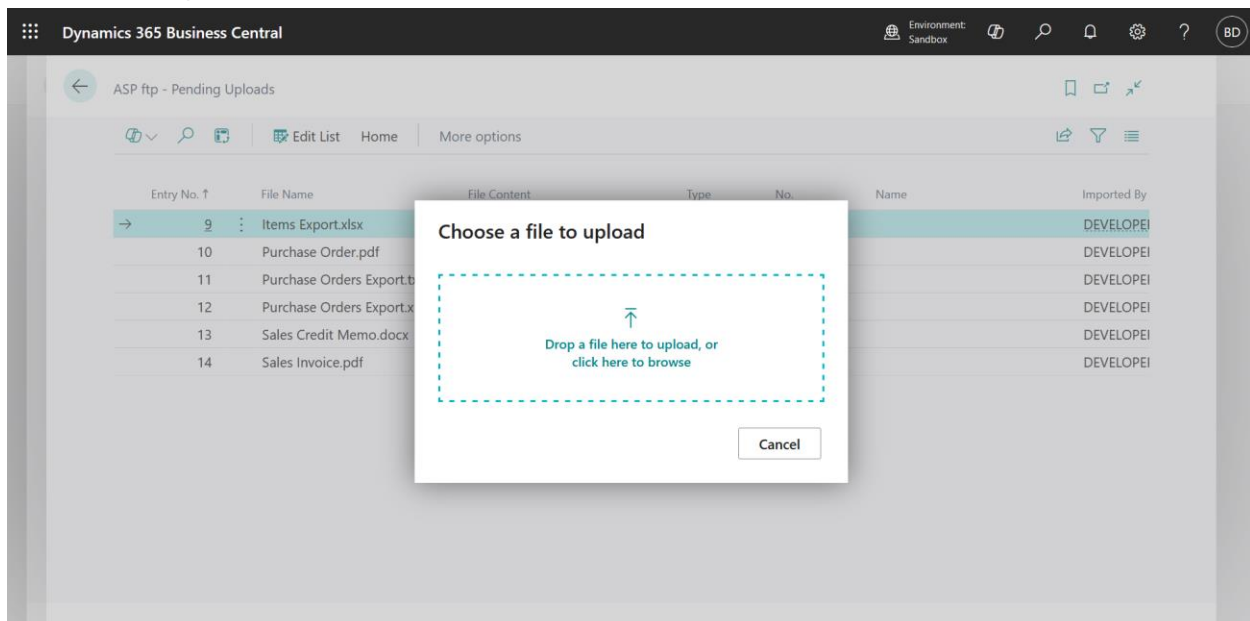
This provides File transmission via SFTP (Secure File Transfer Protocol).

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.

Dynamics 365 Business Central

Environment: Sandbox

ASP ftp - Pending Uploads

✓ Saved

Edit List Home More options

Entry No. ↑	File Content	Type	No.	Name	Imported By	Imported Timestamp
9	View File	Customer	10000	Adatum Corporation	DEVELOPER	5/21/2024 6:43 P...
10	View File	Customer	20000	Trey Research	DEVELOPER	5/21/2024 6:43 P...
11	View File	Customer	30000	School of Fine Art	DEVELOPER	5/21/2024 6:44 P...
12	View File	Vendor	10000	Fabrikam, Inc.	DEVELOPER	5/21/2024 6:44 P...
13	View File	Vendor	20000	First Up Consultants	DEVELOPER	5/21/2024 6:44 P...
→ 14	View File	Vendor	10000	Fabrikam, Inc.	DEVELOPER	5/21/2024 6:44 P...

javascript:

- c. Batch upload files to the SFTP remote Folder.

Dynamics 365 Business Central

Environment: Sandbox

ASP ftp - Pending Uploads

✓ Saved

Edit List Delete Home More options

Import To Business Central Batch Upload To SFTP

11	Purchase Order.pdf	View File	Customer	10000	Adatum Corporation	DEVELOPER
12	Items Export.xlsx	View File	Customer	20000	Trey Research	DEVELOPER
13	Sales Invoice.pdf	View File	Customer	30000	School of Fine Art	DEVELOPER
14	Sales Credit Memo.docx	View File	Vendor	10000	Fabrikam, Inc.	DEVELOPER
15	Purchase Orders Export.txt	View File	Vendor	20000	Trey Research	DEVELOPER
16	Items Export.csv	View File	Vendor	30000	Graphic Design Institute	DEVELOPER
→ 17	Purchase Orders Export.xlsx	View File	Customer	40000	Alpine Ski House	DEVELOPER

- d. Download uploaded file for review.
This can be done either manually or scheduled via a batch.

Environment: Sandbox

ASP ftp - Downloaded Files

✓ Saved

Edit List Home More options

Type	No.	Name	File Type	File Name	File Content	Processed
→ Customer	10000	Adatum Corporation	Excel	Items Export.xlsx	View File	<input type="checkbox"/>
Customer	10000	Adatum Corporation	PDF	Purchase Order.pdf	View File	<input type="checkbox"/>
Customer	10000	Adatum Corporation	Text	Purchase Orders Export.txt	View File	<input type="checkbox"/>
Customer	10000	Adatum Corporation	Excel	Purchase Orders Export.xlsx	View File	<input type="checkbox"/>
Customer	10000	Adatum Corporation	Word	Sales Credit Memo.docx	View File	<input type="checkbox"/>
Vendor	10000	Fabrikam, Inc.	Excel	Items Export.xlsx	View File	<input type="checkbox"/>
Vendor	10000	Fabrikam, Inc.	PDF	Purchase Order.pdf	View File	<input type="checkbox"/>
Vendor	10000	Fabrikam, Inc.	Text	Purchase Orders Export.txt	View File	<input type="checkbox"/>
Vendor	10000	Fabrikam, Inc.	Excel	Purchase Orders Export.xlsx	View File	<input type="checkbox"/>
Vendor	10000	Fabrikam, Inc.	Word	Sales Credit Memo.docx	View File	<input type="checkbox"/>

javascript:

Schedule files to download automatically via a batch on the job queue.

Job Queue Entries

+ New Edit List Delete Edit View Set Status to Ready Restart Log Entries Run once (foreground) ...

Status	User ID	Object Type to Run ↓	Object ID to Run ↓	Object Caption to Run	Description	Job Queue Category Code	Priority
→ On Hold	DEVELOPER	Report	14277657	ASP ftp - Scheduled Downloads	Batch to Handle ftp Scheduled Downloads		Normal
Ready	DEVELOPER	Report	14277110	APS Get Envelope Status	APS Get Envelope Status		Normal
On Hold	DEVELOPER	Report	14263032	ASM Calculate and Post ASM WIP	Batch to Calculate and Post ASM Service...		Normal
On Hold	DEVELOPER	Report	14263007	Delete Closed ASM Service Orders	Batch to ASM Delete Service Orders		Normal
Ready	DEVELOPER	Report	14259276	Calculate SMFee Contracts Due Dates	Calculate SMFee Contracts Due Dates		Normal
Ready	SYSTEM	Codeunit	36952	Update Dim. Set Entries	Update Power BI Dimension Set Entries	PBI	Normal
Ready	SYSTEM	Codeunit	8058	Update Serv. Comm. Term. Dates	Update Serv. Comm. Term. Dates		Normal

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

Dynamics 365 Business Central

Environment: Sandbox

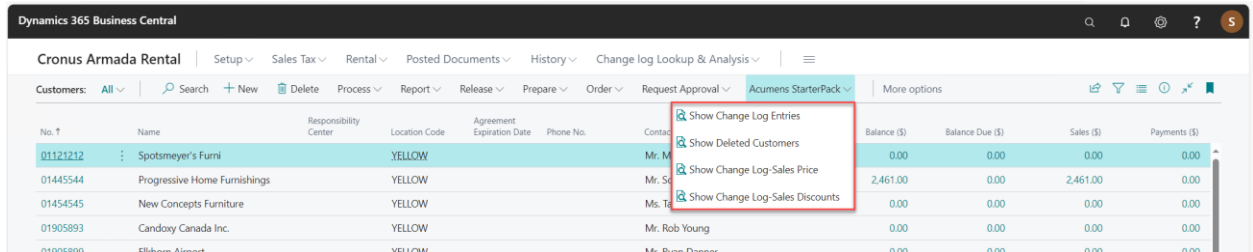
ASP ftp - Processed Files

Home More options

Type	No.	Name	File Type	File Name	File Content	Processed
Vendor	20000	First Up Consultants	Excel	Items Export.xlsx	View File	<input checked="" type="checkbox"/>
Vendor	20000	First Up Consultants	PDF	Purchase Order.pdf	View File	<input checked="" type="checkbox"/>
Vendor	20000	First Up Consultants	Text	Purchase Orders Export.txt	View File	<input checked="" type="checkbox"/>
Vendor	20000	First Up Consultants	Excel	Purchase Orders Export.xlsx	View File	<input checked="" type="checkbox"/>
Vendor	20000	First Up Consultants	Word	Sales Credit Memo.docx	View File	<input checked="" type="checkbox"/>
Customer	10000	Adatum Corporation	CSV	Items Export.csv	View File	<input checked="" type="checkbox"/>
Vendor	10000	Fabrikam, Inc.	CSV	Items Export.csv	View File	<input checked="" type="checkbox"/>
Vendor	20000	First Up Consultants	CSV	Items Export.csv	View File	<input checked="" type="checkbox"/>

1.9. Change Log Lookup

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



The screenshot shows the Dynamics 365 Business Central interface for the 'Cronus Armada Rental' company. The 'Change log Lookup & Analysis' menu is open, and the 'Show Change Log Entries' option is highlighted with a red box. The main table displays a list of customers with columns for No., Name, Responsibility Center, Location Code, Agreement Expiration Date, Phone No., Contact, Balance (\$), Balance Due (\$), Sales (\$), and Payments (\$).

No.	Name	Responsibility Center	Location Code	Agreement Expiration Date	Phone No.	Contact	Balance (\$)	Balance Due (\$)	Sales (\$)	Payments (\$)
01121212	Spotsmeyer's Furni		YELLOW			Mr. M	0.00	0.00	0.00	0.00
01445544	Progressive Home Furnishings		YELLOW			Mr. S	2,461.00	0.00	2,461.00	0.00
01454545	New Concepts Furniture		YELLOW			Ms. T	0.00	0.00	0.00	0.00
01905893	Candoxy Canada Inc.		YELLOW			Mr. Rob Young	0.00	0.00	0.00	0.00
01905899	Filkhorn Alimort		YELLOW			Mr. Ryan Danner	0.00	0.00	0.00	0.00

Documents which include the below:

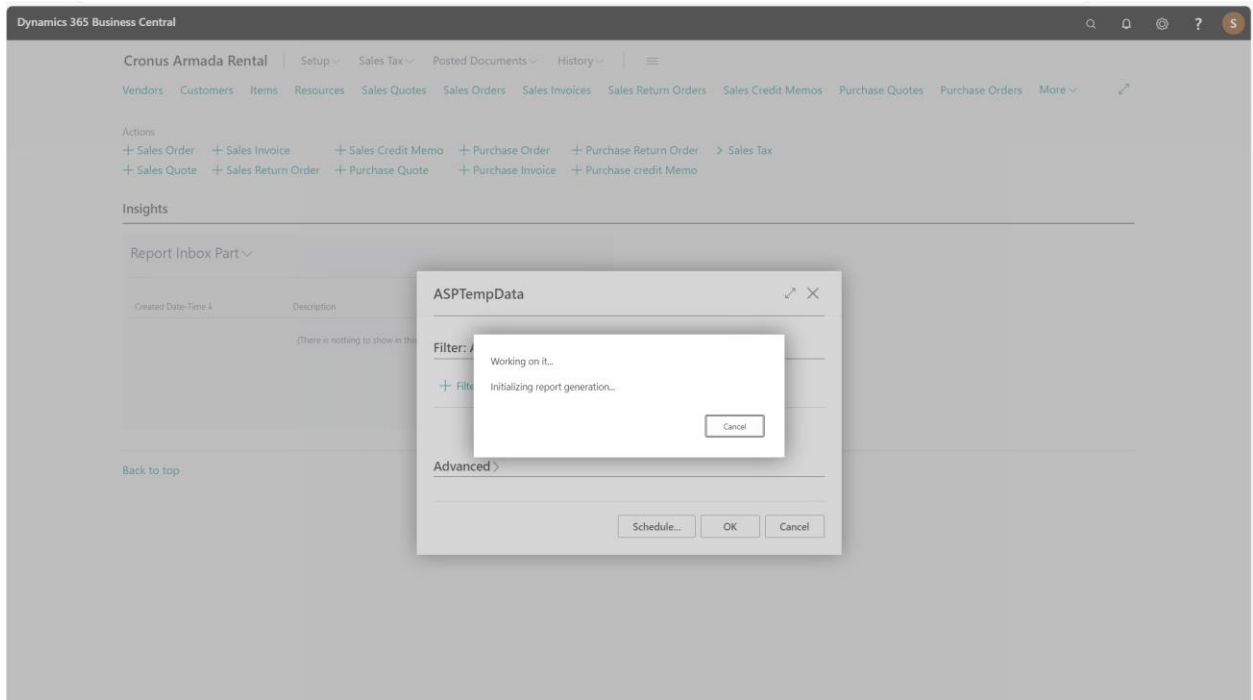
- Customers
- Vendors
- Items
- Insurance Policies
- Machine Centers
- Fixed Assets
- Bank Accounts
- Stockkeeping Units
- Jobs
- Contacts
- Service Items
- Comments (Sales)
- Comments (Stockkeeping Units)
- Production BOMs / Production BOM
- Prod. BOM Version List
- Routings / Routing
- Routing Version 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.

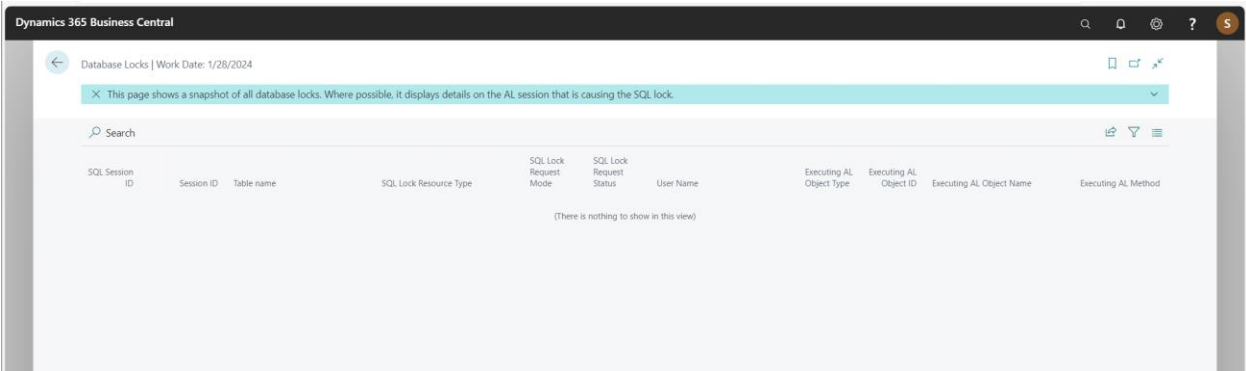
Database lock while change is actively running:



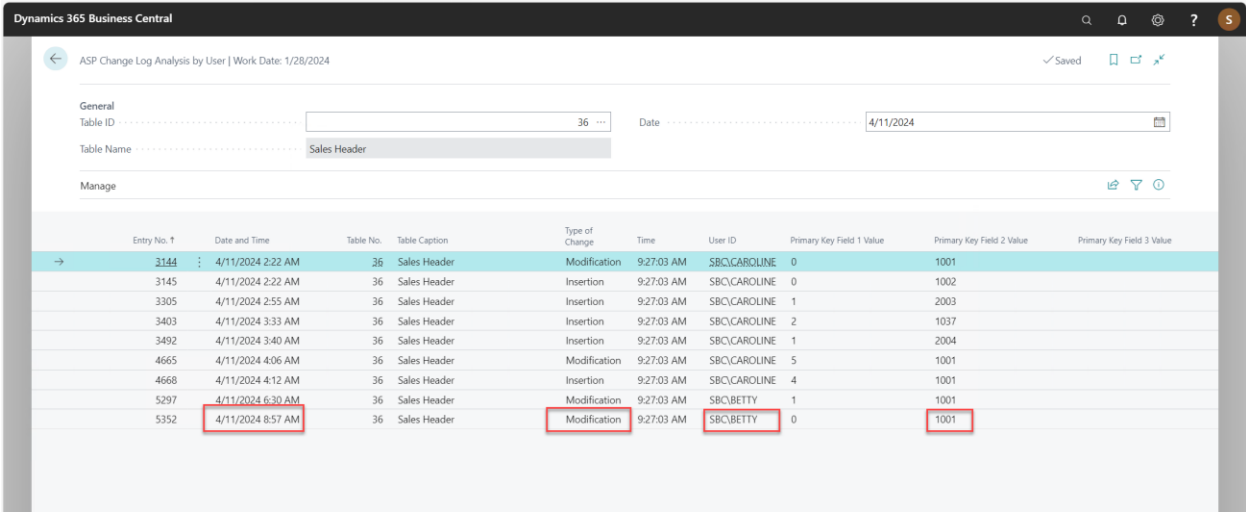
The screenshot shows the 'Database Locks' report in Dynamics 365 Business Central. The report title is 'Database Locks | Work Date: 1/28/2024'. A message at the top states: 'This page shows a snapshot of all database locks. Where possible, it displays details on the AL session that is causing the SQL lock.' The report is a table with the following columns: SQL Session ID, Session ID, Table name, SQL Lock Resource Type, SQL Lock Request Mode, SQL Lock Request Status, User Name, Executing AL Object Type, Executing AL Object ID, Executing AL Object Name, and Executing AL Method. The table contains 12 rows of data, all for Session ID 18. The 'User Name' column for all rows is 'SBC\BETTY', which is highlighted with a red box. The 'Table name' column shows 'Sales Header' for the first four rows and 'Change Log Entry' for the remaining eight rows. The 'SQL Lock Resource Type' is 'KEY' for all rows. The 'SQL Lock Request Mode' is 'Update' for the first two rows and 'Exclusive' for the remaining ten rows. The 'SQL Lock Request Status' is 'Granted' for all rows. The 'Executing AL Object Name' column shows 'Change Log Management' for most rows, and 'Integration Management' for one row. The 'Executing AL Method' column shows 'LogModification' for most rows, and 'IsNormalField' for some rows.

SQL Session ID	Session ID	Table name	SQL Lock Resource Type	SQL Lock Request Mode	SQL Lock Request Status	User Name	Executing AL Object Type	Executing AL Object ID	Executing AL Object Name	Executing AL Method
75	18	Sales Header	KEY	Update	Granted	SBC\BETTY	Codeunit	423	Change Log Management	LogModification
75	18	Sales Header	KEY	Update	Granted	SBC\BETTY	Codeunit	423	Change Log Management	IsNormalField
75	18	Sales Header	KEY	Exclusive	Granted	SBC\BETTY	Codeunit	423	Change Log Management	IsNormalField
75	18	Sales Header	KEY	Exclusive	Granted	SBC\BETTY	Codeunit	423	Change Log Management	LogModification
75	18	Change Log Entry	KEY	Exclusive	Granted	SBC\BETTY	Codeunit	423	Change Log Management	LogModification
75	18	Change Log Entry	KEY	Exclusive	Granted	SBC\BETTY	Codeunit	423	Change Log Management	IsNormalField
75	18	Change Log Entry	KEY	Exclusive	Granted	SBC\BETTY	Codeunit	423	Change Log Management	IsNormalField
75	18	Change Log Entry	KEY	Exclusive	Granted	SBC\BETTY	Codeunit	5150	Integration Management	IsNormalField
75	18	Change Log Entry	KEY	Exclusive	Granted	SBC\BETTY	Codeunit	6153	API Webhook Notification Mgt.	LogModification
75	18	Change Log Entry	KEY	Exclusive	Granted	SBC\BETTY	Codeunit	423	Change Log Management	LogModification

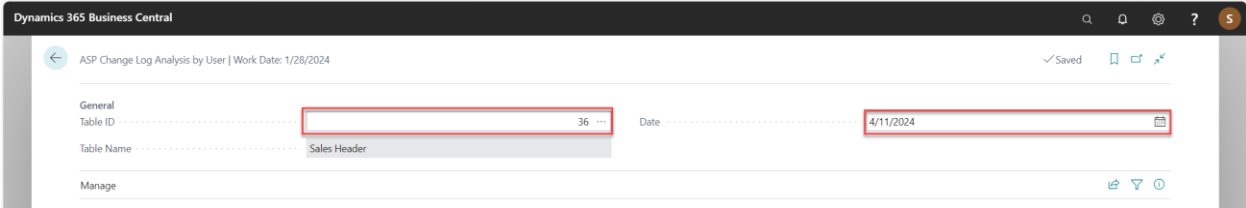
After the change is completed, Database lock page is cleared.



Change Log Analysis by User page will show the Change and the User after:

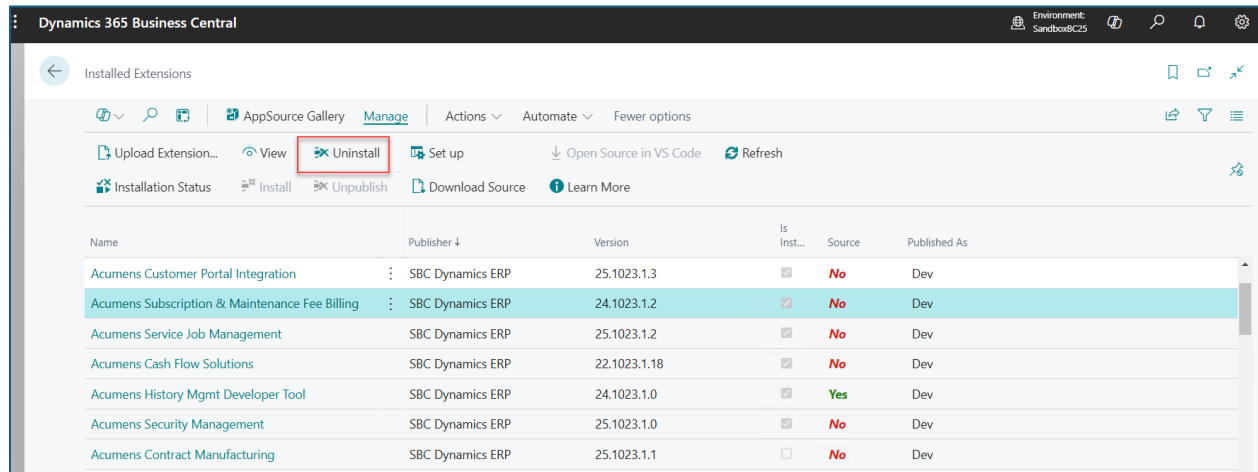


Analysis can be done for a select list of Tables (user defined) and date.



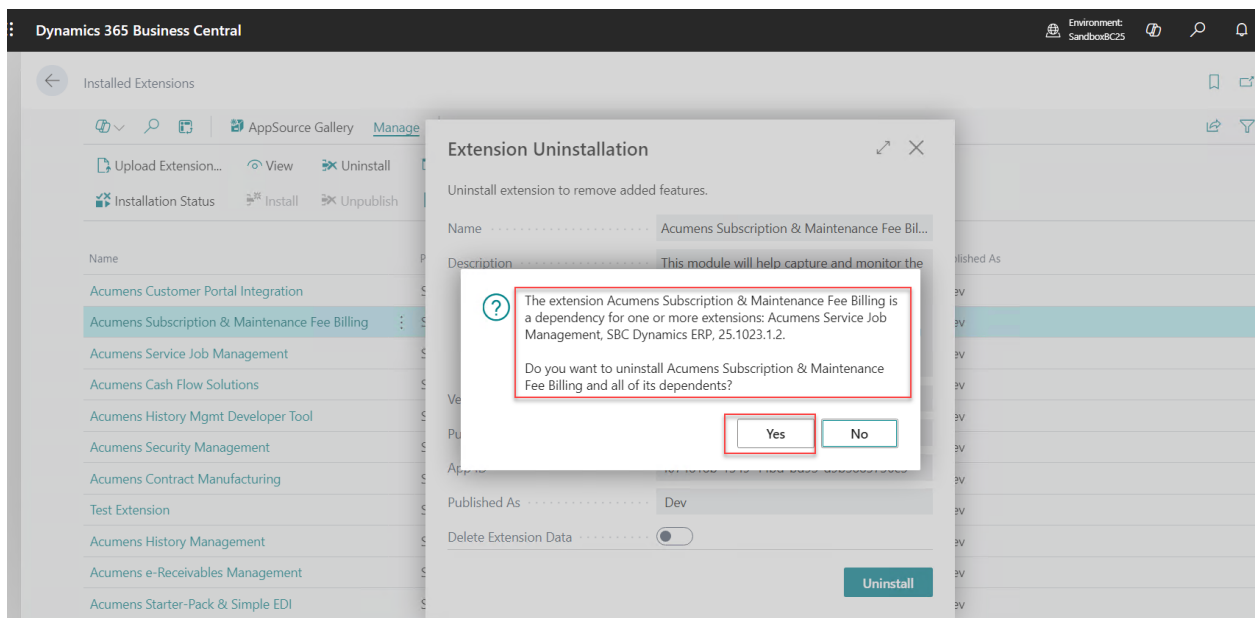
1.11. App Tracker.

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.



The screenshot shows the 'Installed Extensions' page in Dynamics 365 Business Central. The 'Uninstall' button in the top toolbar is highlighted with a red box. Below the toolbar is a table listing installed extensions.

Name	Publisher	Version	Is Inst...	Source	Published As
Acumens Customer Portal Integration	SBC Dynamics ERP	25.1023.1.3	<input checked="" type="checkbox"/>	No	Dev
Acumens Subscription & Maintenance Fee Billing	SBC Dynamics ERP	24.1023.1.2	<input checked="" type="checkbox"/>	No	Dev
Acumens Service Job Management	SBC Dynamics ERP	25.1023.1.2	<input checked="" type="checkbox"/>	No	Dev
Acumens Cash Flow Solutions	SBC Dynamics ERP	22.1023.1.18	<input checked="" type="checkbox"/>	No	Dev
Acumens History Mgmt Developer Tool	SBC Dynamics ERP	24.1023.1.0	<input checked="" type="checkbox"/>	Yes	Dev
Acumens Security Management	SBC Dynamics ERP	25.1023.1.0	<input checked="" type="checkbox"/>	No	Dev
Acumens Contract Manufacturing	SBC Dynamics ERP	25.1023.1.1	<input type="checkbox"/>	No	Dev



Extension management Log.

Dynamics 365 Business Central

Environment: Sandbox8C2S

ASP 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.

Dynamics 365 Business Central

Environment: SandboxSC25

ASP Bank Rec. Worksheet

Environment: SandboxSC25

✓ Saved

CHECKING · 25 · 11/25/2024

Home

Report

Posting

Bank Rec.

More options

General

Bank Account No. ············ CHECKING ············

Statement No. ············ 25 ············

Statement Date ············ 11/25/2024 ············

G/L Balance (\$) ············ 15,145.60 ············

G/L Balance ············ 15,145.60 ············

+ Positive Adjustments ············ 0.00 ············

Subtotal ············ 15,145.60 ············

- Negative Adjustments ············ 0.00 ············

Ending G/L Balance ············ 15,145.60 ············

Difference ············ 0.00 ············

Cleared With./Chks. Per Stmt. ············ 2,689.75 ············

Cleared Inc./Dpsts. Per Stmt. ············ 17,835.35 ············

Balance on Statement ············ 15,145.60 ············

+ Outstanding Deposits ············ 0.00 ············

Subtotal ············ 15,145.60 ············

- Outstanding Checks ············ 0.00 ············

Ending Balance ············ 15,145.60 ············

Checks

Line

Bank Rec.

Posting Date

Document Type

Document No.

Description

Amount

Cleared

Cleared Amount

Difference

→ 11/19/2024

Payment

200

First Up Consultants

2,689.75

☒

2,689.75

0.00

Statement

2,689.75

Total Cleared

2,689.75

Deposits/Transfers

Line

Functions

Collapse Status

Posting Date

Document Type

Document No.

Description

Amount

Cleared

Cleared Amount

Difference

→ -

1/18/2024

Payment

BANK1

Transfer, January 2024

2,743.90

☒

2,743.90

0.00

1/18/2024

Payment

BANK2

Transfer of funds for Spring 2024

4,115.85

☒

4,115.85

0.00

1/18/2024

Payment

DEPOSIT3

Deposit 3, 2024

5,487.80

☒

5,487.80

0.00

1/18/2024

Payment

DEPOSIT4

Deposit 4, 2024

5,487.80

☒

5,487.80

0.00

Statement

17,835.35

Total Cleared

17,835.35

Adjustments

Manage

Line

Posting Date

Document Type

Document No.

Account Type

Account No.

Description

Amount

Bal. Account Type

Bal. Account No.

→ 3/1/2025

Bank Account

CHECKING

World Wide Bank

0.00

G/L Account

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.

The first screenshot shows the 'User Setup' page in Dynamics 365 Business Central. The 'View G/L' checkbox for the 'DEVELOPER' user is highlighted with a red box. The 'Allow to edit Posted Sales Doc' checkbox is checked.

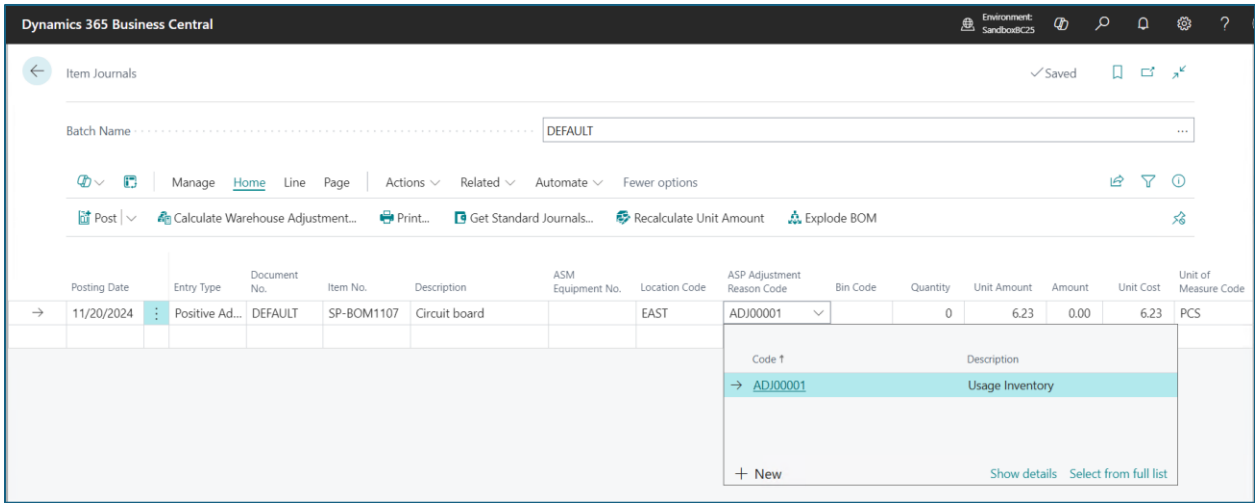
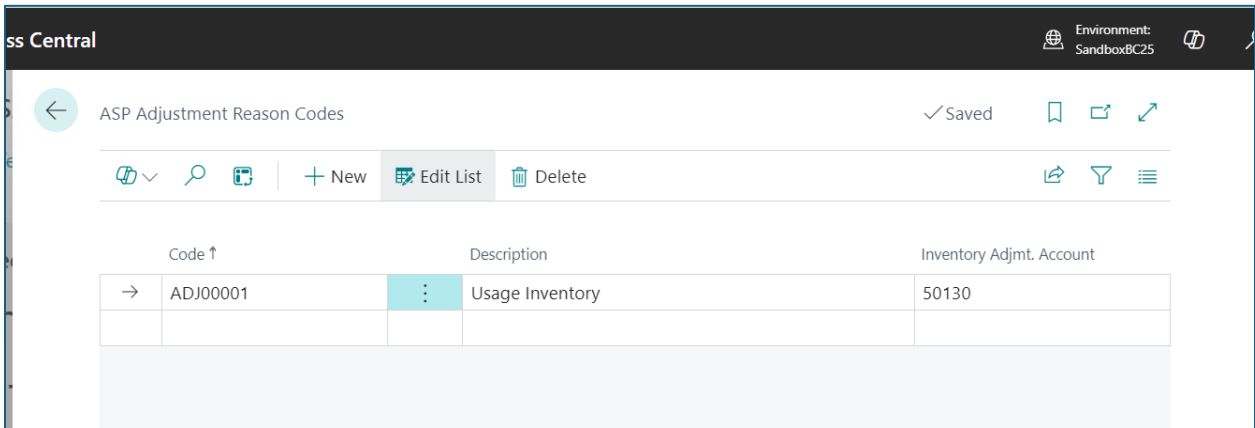
User ID ↑	Rental Salesperson Code	Cash Payment Code	Card Payment Code	Employee No.	Resource No.	Allow Dispatch Posting From	Allow Dispatch Posting To	EQM User	Acc... as Ren... Ad...	Phone No.	View G/L	Allow to edit Posted Sales Doc	Adjust Approval Required
→ DEVELOPER								Yes	<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The second screenshot shows the 'Chart of Accounts' page. The 'Chart of Accounts' tab is selected, and the 'Home' sub-tab is active. The page displays a table with columns: No., Net Change, Balance, Income/Balance, Account Category, Account Subcategory, Account Type, Totaling, and Gen. Po. Type. The message '(There is nothing to show in this view)' is displayed.

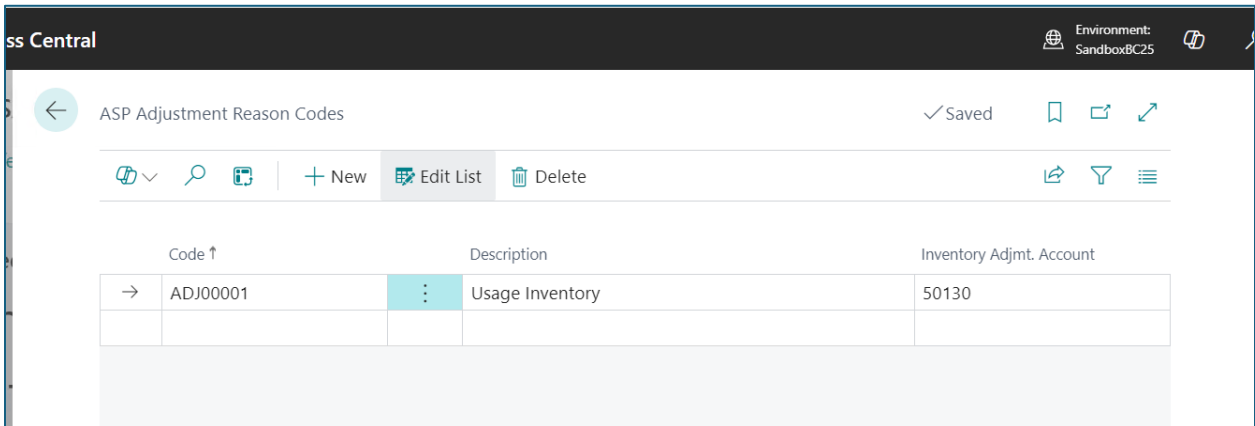
The third screenshot shows the 'General Ledger Entries' page. The 'Edit List' tab is selected, and the 'Home' sub-tab is active. The page displays a table with columns: Entry No., Posting Date, Document Type, Document No., G/L Account No., Description, ASM Service Order No., Amount (\$), Departme... Code, Cust... Code, Gen. Posti... Type, Gen. Bus. Posting Group, and Gen. Prod. Posting Grc. The message '(There is nothing to show in this view)' is displayed.

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.



Dynamics 365 Business Central

Environment: SandboxBC25

50130 Inventory Adj. Account

General Ledger Entries

Find entries... Reverse Transaction... Correct Dimensions Entry

Entry No.	Posting Date	Document Type	Document No.	G/L Account No.	Description	ASM Service Order No.	Amount (\$)	Department Code	Customer Code	Gen. Posting Type	Gen. Bus. Posting Group
4392	11/20/2024	DEFAULT		50130	Direct Cost on 11/20/24		-60.00				
4391	11/20/2024	DEFAULT		14110	Direct Cost on 11/20/24		60.00				

1.15. Write-off Return Inventory.

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

Dynamics 365 Business Central

Environment: SandboxBC25

Sales Return Order

S-RETORD1001 · The Cannon Group PLC

Home Prepare Print/Send Request Approval Return Order Acumens eMailing Acumens e-POS Payments Acumens e-Tax Actions Related Automate Fewer options

General

Customer Name The Cannon Group PLC

Sell-to

Country/Region US

Contact Mr. Andy Teal

Email Developer@sbcdynamicserp.com

Posting Date 11/20/2024

Order Date 11/20/2024

External Document No.

No. of Archived Versions 0

Campaign No.

Responsibility Center

Assigned User ID

Status Open

Acumens StarterPack

Write Off Inventory ☒

Return-from Address Adatum Corporation

Lines Manage Functions Line Show Lines with Issues

Type	No.	Item Reference No.	Description	Return Reason Code	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Cha... Use Tax	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Return
Comment			Invoice No. PS-INV103223:							<input type="checkbox"/>	*			
Item	SP-BOM1108		Power cord		EAST	4	PCS	100.00	SALESTAX	<input type="checkbox"/>	NONTAXABLE		400.00	

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

Dynamics 365 Business Central

Environment: SandboxBC25

Item Ledger Entries

Find entries... Entry Order Tracking Application Worksheet More options

Posting Date	Entry Type	Document Type	Document No.	Item No.	Location Code	Quantity	Involved Quantity	Cost Amount (Actual)	Department Code	ASM Equipment No.	Description
11/20/2024	Negative Adjmt.		S-RCPT107001	SP-BOM1108	EAST	-4	-4	-27.89	SALES		
11/20/2024	Sale	Sales Return Receipt	S-RCPT107001	SP-BOM1108	EAST	4	4	27.89	SALES		

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.

Dynamics 365 Business Central

Posted Sales Invoice

PS-INV103221 · The Cannon Group PLC

Home Print/Send Invoice Incoming Document Electronic Document Acumens eMailing Acumens Customer Portal **Acumens StarterPack** Acumens e-POS Payments More options

Adjust Sales

General

No. PS-INV103221 Canceled No

Customer The Cannon Group PLC Closed

Contact Mr. Andy Teal Email edwin@sbcdynamicserp.com

Posting Date 10/15/2024 Customer PO Ref. 1

Due Date 11/15/2024 Customer PO Ref. 2

Promised Pay Date Dispute Status

Quote No. Acumens StarterPack

Order No. S-ORD101023 Sales Adjustment

Last Adjustment No.

Lines Manage Line

Archived Billing Lines Usage Data New Line Delete Line

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 Liabe, VAT % and Tax Amount fields by updating the related field. Quantity field has an extra permissions and can only be adjusted by permitted users.

Dynamics 365 Business Central

Sales Adjustment

Invoice · PS-INV103221 · 1

HOME Automate Fewer options

Post...

General

Document Type Invoice Posting Date 11/20/2024 9:37 AM

No. PS-INV103221 External Document No. 01 Approval Required

Sell-To Customer No. 10000 Location Code CA Approved

Sell-To Customer Name Order S-ORD101023 Department Code SALES Approved By

Sell-To Customer Name 2 1M(8D) Customergroup Code Approved DateTime

Sell-to Address Tax Liabe New Amount Including Tax 192.80

Sell-to Address 2 New Tax Liabe Amount Including Tax 192.80

Sell-to City Tax Area Code

Sell-to Contact EXW Created By DEVELOPER

Lines

Type	No.	Description	Location Code	Quantity	New Quantity	Unit Price Excl. Tax	New Unit Price Excl. Tax	Line Discount %	New Line Discount %	Line Discount Amount	New Line Discount Amount	Amount	New Amount	Tax Liabe	New Tax Liabe
Item	10000	RESALE	CA	1	1	192.80						192.80	192.80		

Original

Tax Amount 0.00 Total Amount Excl. Tax 192.80

Total Amount Excl. Tax 192.80 Total Amount Incl. Tax 192.80 Tax Amount 0.00

The part below will show the the original and the adjusted document Amounts.

Dynamics 365 Business Central

Environment: SandboxBC25

Sales Adjustment

Invoice · PS-INV103221 · 1

HOME | Automate | Fewer options

Post...

General

Lines

Type	No.	Description	Location Code	Quantity	New Quantity	Unit Price Excl. Tax	New Unit Price Excl. Tax	Line Discount %	New Line Discount %	Line Discount Amount	New Line Discount Amount
→ Item	1900:5	RESALE	CA	1	1		192.80		10		19.28

Original

Total Amount Excl. Tax	192.80
Tax Amount	0.00
Total Amount Incl. Tax	192.80

New

Total Amount Excl. Tax	173.52
Tax Amount	0.00
Total Amount Incl. Tax	173.52

Posted Sales Adjustment can be opened from the posted document.

Dynamics 365 Business Central

Environment: SandboxBC25

Posted Sales Invoice

PS-INV103221 · The Cannon Group PLC

Home | Print/Send | Invoice | Incoming Document | Electronic Document | Acumens eMailing | Acumens Customer Portal | Acumens StarterPack | Acumens e-POS Payments | ...

General

Show more

No.	PS-INV103221	Canceled	No
Customer	The Cannon Group PLC	Closed	
Contact	Mr. Andy Teal	Email	edwin@sbcdynamicserp.com
Posting Date	10/15/2024	Customer PO Ref. 1	
Due Date	11/15/2024	Customer PO Ref. 2	
Promised Pay Date		Dispute Status	
Quote No.		Acumens StarterPack	
Order No.	S-ORD101023	Sales Adjustment	
		Last Adjustment No.	1

Dynamics 365 Business Central Environment: SandboxBC25

Posted Sales Invoice

Posted Sales Adjustment - Invoice · PS-INV103221 · 1

Manage Page

Bill-To Customer No.	10000	Created By	DEVELOPER
Bill-To Name	The Cannon Group PLC	Created DateTime	11/20/2024 10:38 AM
Bill-To Name 2		Approval Required	<input type="checkbox"/>
Bill-to Address	1099 38th Ave	Approved	<input type="checkbox"/>
Bill-to Address 2		Approved By	
Bill-to City	Santa Cruz	Approved DateTime	

Type	No.	Description	Location Code	Quantity	New Quantity	Unit Price Excl. Tax	Unit Price Excl. Tax	Line Discount %	New Line Discount %	Line Discount Amount	New Line Discount Amount
→ Item	1900-S	RESALE	CA	1	1	0.00	192.80	0	10	0.00	19.28

Close

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

Dynamics 365 Business Central Environment: SandboxBC25

14130 Finished Goods

General Ledger Entries

Find entries... Reverse Transaction... Correct Dimensions Entry

Entry No. ↑	Posting Date	Document Type	Document No.	G/L Account No.	Description	Departm... Code	Cust... Code	Gen. Posti... Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount (\$)	Bal. Account Type
→ 4378	10/15/2024		PS-INV103221	14130	Direct Cost 10000 on 10/15/24	SALES					-150.30	G/L Accou
4379	10/15/2024		PS-INV103221	50110	Direct Cost 10000 on 10/15/24	SALES					150.30	G/L Accou
4380	10/15/2024	Invoice	PS-INV103221	40140	Order S-ORD101023	SALES		Sale	DOMESTIC	RETAIL	-192.80	G/L Accou
4381	10/15/2024	Invoice	PS-INV103221	15110	Order S-ORD101023	SALES					192.80	G/L Accou
4406	10/15/2024	Credit Memo	PS-INV103221	40910	Adj:Order S-ORD101023			Sale	DOMESTIC	RETAIL	-19.28	G/L Accou
4407	10/15/2024	Credit Memo	PS-INV103221	40140	Adj:Order S-ORD101023			Sale	DOMESTIC	RETAIL	38.56	G/L Accou
4408	10/15/2024	Credit Memo	PS-INV103221	15110	Adj:Order S-ORD101023	SALES					-19.28	G/L Accou

Dynamics 365 Business Central Environment: SandboxBC25

Customer Ledger Entries

Show Document Apply Entries Find entries... Reverse Transaction... Create Reminder... Create Finance Charge Memo...

Posting Date	Document Date	Document Type	Document No.	Customer No.	Customer Name	Description	Departm... Code	Cust... Code	Curre... Code	Original Amount	Amount
→ 10/15/2024	10/15/2024	Credit Me...	PS-INV1032...	10000	The Cannon Group PLC	Adj:Order S-ORD101023	SALES			-19.28	-19.28
10/15/2024	10/15/2024	Invoice	PS-INV1032...	10000	The Cannon Group PLC	Order S-ORD101023	SALES			192.80	192.80



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.

← Sales Order

✓ Saved

S-ORD101053 · Spotsmeyer's Furnishings

Notifications: 3 The available inventory for item 1000 is lower than the entire... | Default Dimension Priorities are not defined for ... | This customer has an over... ▼

Home

Prepare

Print/Send

Request Approval

Order

Report

Acumens eMailing

Acumens Customer Portal

Acumens StarterPack

...

①

Pro Forma Invoice

Print Confirmation

DocuSign Approval ▼

✉ Send...

Customer Name

Spotsmeyer's Furnishings

Due Date

3/31/2025

📅

Contact

Mr. Mike Nash

...

Requested Delivery Date

📅

Document Date

3/1/2025

📅

External Document No.

Posting Date

3/1/2025

📅

Status

Open

Order Date

3/1/2025

📅

Driver No

▼

Acumens e-Tax

Show more

Ship-to Address Verified

☐

Tax Exemption Type

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

ⓘ

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.

download of this

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.

←Acumens DocuSign Envelope

+

🔖🔗↗

S-ORD101053 · Spotsmeyer's Furnishings

HOME | More options

General

Source Document No. · ·

S-ORD101053

Document Name · · · · ·

Sales - Confirmation.pdf

Envelope Status · · · · ·

Sent

Email Address · · · · ·

developer@sbcdynamicserp.com

Recipient Name · · · · ·

Spotsmeyer's Furnishings

Email Subject · · · · ·

Please sign this document

Log Lines

📄

New Line

✖

Delete Line

Envelope ID

Created At

Status

→ 8ab34cfc-18bd-4758-a76f-1c8a805887...

:

2024-12-23T18:01:19.6200000ZSent

Append Signature.

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

Drag and drop fields from the left panel onto the document

Signature

Initial

Stamp

Date Signed

Name

First Name

Last Name

Email Address

Company

Title

Text

Checkbox

DocuSign Envelope ID: 8AB34CFC-18BD-4758-A76F-1C6A80588767

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
www.docusign.com

Order ConfirmationS-ORD101053

March 1, 2025
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Spotsmeyer's Furnishings
Mr. Mike Nash
120 E Monterey Ave
Pomona, CA 91767
USA

CRONUS[®]
CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772
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
michael@spotsmeyer.com

Ready to Finish?
You've completed the required fields. Review your work, then select FINISH

Finish

Print the signed document.

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

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

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
www.docusign.com

Order ConfirmationS-ORD101053

March 1, 2025
Page 1 / 1

Spotsmeyer's Furnishings
Mr. Mike Nash
120 E Monterey Ave
Pomona, CA 91767
USA

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

External Document No.

Sales person
Brittany Johnsen

Quote No.

Shipment Method
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
E69A5281CA8C427 ...

Void DocuSign Approval Process.

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

← Acumens DocuSign Envelope

+

S-ORD101054 · Spotsmeyer's Furnishings

HOME

More options

X Void Envelope

Check Status

Source Document No. · · S-ORD101054

Document Name · · · · · Sales - Confirmation.pdf

Envelope Status · · · · · Sent

Email Address · · · · · developer@sbcdynamicserp.com

Recipient Name · · · · · Spotsmeyer's Furnishings

Email Subject · · · · · Please sign this document

Log Lines

New Line

Delete Line

Envelope ID	Created At	Status
→ 5dc1c896-7e25-45ca-9921-dc131600a... ⋮	2024-12-26T13:41:00.1870000Z	Sent

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.

The screenshot shows the 'Items' page in Microsoft Dynamics 365. A table lists various inventory items with columns for Item No., Description, Type, Quantity on Hand, Subst. Exist, and Cost is Adj... The 'Import Images' context menu is open for the first item, 'J&R Office Drawers', with 'Import Images - Local' and 'Import Images - Azure' options highlighted by a red box.

No. ↑	Description	Type	Quantity on Hand	Subst. Exist	Cost is Adj...
1000	J&R Office Drawers	Inventory	2	No	✓
1001	Premium Support	Non-Invent...	—	No	✓
1002	Billing Item (Maintenance)	Non-Invent...	—	No	✓
1003	Hardware	Inventory	36	No	✓
1896-S	ATHENS Desk	Inventory	99	No	✓
1900-S	PARIS Guest Chair, black	Inventory	-2	No	✓
1906-S	ATHENS Mobile Pedestal	Inventory	250	No	✓
1908-S	LONDON Swivel Chair, blue	Inventory	3	No	✓
1920-S	ANTWERP Conference Table	Inventory	10	No	✓
1925-W	Conference Bundle 1-6	Inventory	0	No	✓
1928-S	AMSTERDAM Lamp	Inventory	8	No	✓

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.