

# 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 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]

[\$\*\*\*\*\*534.00]

London Postmaster  
10 North Lake Avenue  
Atlanta, GA 31772  
USA

Details Attached:

<b>Check Detail - Report</b>				
		<b>January 25, 2024</b>	<b>Check No.</b>	<b>318</b>
<b>Document No.</b>	<b>Document Date</b>	<b>Posting Description</b>		<b>Amount</b>
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
			<b>Total</b>	<b>534.00</b>

### 1.1.2. Check with MICR Code.

Report run options:

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:

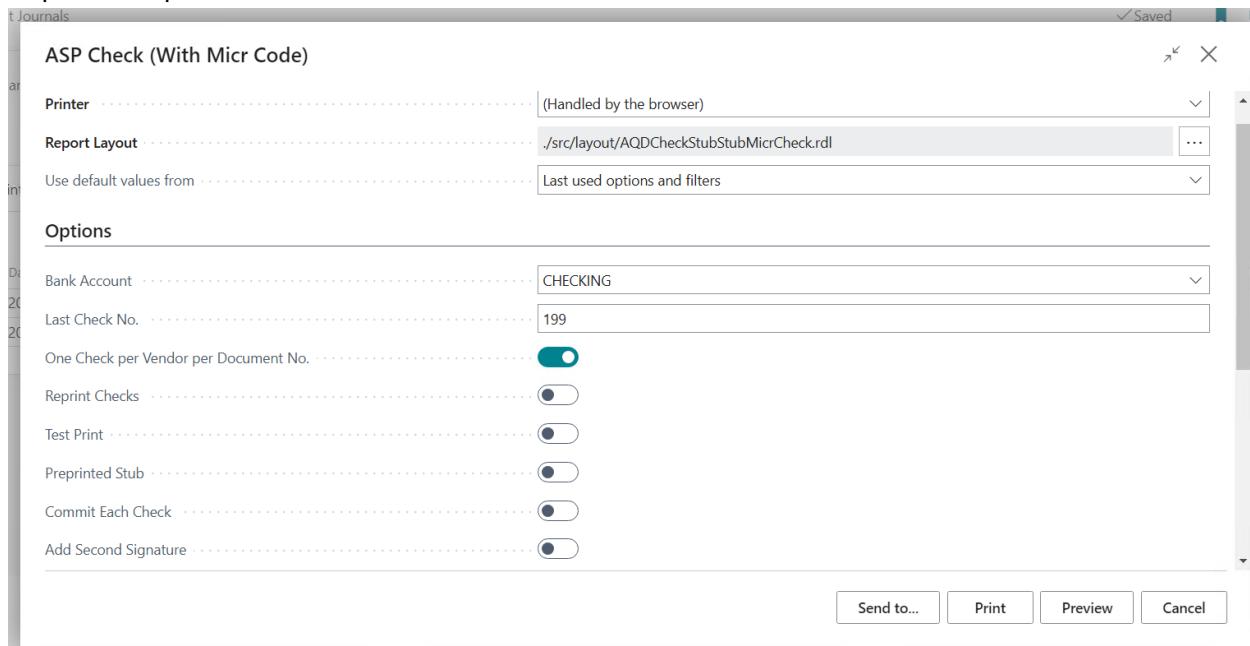
Test Print:

Preprinted Stub:

Commit Each Check:

Add Second Signature:

**Buttons:** Send to... Print Preview Cancel



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

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

\*\*\*\*\*2 689 75

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

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## 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

2375 | 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	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 | Search | Edit List | **Process** | Report | Line | Entry | Navigate | More options

**Apply Entries** (highlighted with a red box)

Posting Date	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	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	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	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	

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

**Post Application...** (highlighted with a red box)

**Preview Posting** | **Show Only Selected Entries to Be Applied**

ID	Posting Date	Type	Document No.	Customer Name	Description	Currency Code	Original Amount	Remaining Amount	Remaining Amt. (\$)	Remaining Due Date	Remaining Due Date (\$)	Remaining Due Date 1	Remaining Due Date 2
8/30/2023	Invoice	RI100012	10000	The Cannon Group PLC	Invoice RI100018		11,760.00	11,760.00	11,760.00	0.00	0.00	8/30/2023	9/1/2023
8/20/2023	Invoice	RI100011	10000	The Cannon Group PLC	Invoice RI100017		11,760.00	11,760.00	11,760.00	0.00	0.00	8/20/2023	8/9/2023
9/12/2023	Invoice	RI100035	10000	The Cannon Group PLC	Invoice 1026		550.00	550.00	550.00	0.00	0.00	9/12/2023	9/20/2023
10/24/2023	Invoice	RI100044	10000	The Cannon Group PLC	Invoice 1034		1,210.00	1,210.00	1,210.00	0.00	0.00	10/24/2023	11/1/2023
12/31/2023	Invoice	00-11	10000	The Cannon Group PLC	Opening Entries, Customers		97,818.17	97,818.17	97,818.17	0.00	0.00	1/31/2024	1/8/2024
12/31/2023	Invoice	00-16	10000	The Cannon Group PLC	Opening Entries, Customers		52,169.68	52,169.68	52,169.68	0.00	0.00	1/31/2024	1/8/2024
12/31/2023	Invoice	00-9	10000	The Cannon Group PLC	Opening Entries, Customers		78,254.54	78,254.54	78,254.54	0.00	0.00	1/31/2024	1/8/2024
1/7/2024	Invoice	103015	10000	The Cannon Group PLC	Order 10101		10,806.72	10,806.72	10,806.72	0.00	0.00	2/4/2024	1/12/2024
1/17/2024	Invoice	103024	10000	The Cannon Group PLC	Order 6005		5,354.85	5,354.85	5,354.85	0.00	0.00	2/17/2024	1/25/2024
1/22/2024	Invoice	103001	10000	The Cannon Group PLC	Invoice 103001		11,776.25	11,776.25	11,776.25	0.00	0.00	2/2/2024	1/30/2024
→ SBC(BETTY)	Invoice	103037	10000	The Cannon Group PLC	Order 1011		106.25	106.25	106.25	106.25	106.25	2/27/2024	1/28/2024
1/28/2024	Invoice	103038	10000	The Cannon Group PLC	Order 1012		106.25	106.25	106.25	0.00	0.00	2/27/2024	1/28/2024
1/28/2024	Invoice	RI100007	10000	The Cannon Group PLC	Invoice RI100011		18,120.00	18,120.00	18,120.00	0.00	0.00	2/28/2024	2/5/2024
1/28/2024	Invoice	RI100008	10000	The Cannon Group PLC	Invoice RI100012		11,760.00	11,760.00	11,760.00	0.00	0.00	2/28/2024	2/5/2024
1/28/2024	Invoice	RI100036	10000	The Cannon Group PLC	Invoice RI100041		4,219.88	4,219.88	4,219.88	0.00	0.00	2/28/2024	2/5/2024
1/28/2024	Invoice	103033	10000	The Cannon Group PLC	Order 1002		4,370.00	4,370.00	4,370.00	0.00	0.00	2/28/2024	2/5/2024
1/28/2024	Invoice	103034	10000	The Cannon Group PLC	Order 1008		106.25	106.25	106.25	0.00	0.00	2/28/2024	2/5/2024

Appln. Currency:

Amount to Apply: 106.25

Pmt. Disc. Amount: 0.00

Rounding: 0.00

Applied Amount: 106.25

Available Amount: -107.00

Balance: -0.75

**Close**

Dynamics 365 Business Central

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

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

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	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	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	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. ↑

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

Dynamics 365 Business Central

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

SC00004 · Prepaid Contract - Hardware

Process Report Acumens StarterPack More options

**General**

Contract No.	SC00004	Phone No.			
Description	Prepaid Contract - Hardware	Email			
Customer No.	30000	Contract Group Code			
Contact No.	CT000012	Salesperson Code	JO		
Sell-to		Quote Type	Quote 1		
Name	John Haddock Insurance Co.	Starting Date	2/1/2024		
Address	10 High Tower Green	Status			
Address 2		Responsibility Center			
City	Miami	Change Status	Open		
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 Liable	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	
2000-5-2	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**

Contract No.	SC00014	Phone No.			
Description	Prepaid Contract - Hardware	Email	CustomerService@sbc.dynamicserp.com		
Customer No.	10000	Contract Group Code			
Contact No.	CT000008	Salesperson Code	BC		
Name	The Cannon Group PLC	Starting Date	1/28/2024		
Address	192 Market Square	Status	Signed		
Address 2		Responsibility Center	BIRMINGHAM		
City	Atlanta	Change Status	Locked		
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 Liable	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:

The screenshot shows the Acumens StarterPack Item Card interface. At the top, there are navigation buttons (Back, Item Card, Work Date: 1/28/2024), a save button (✓ Saved), and a status bar (1.05, RETAIL, FINISHED). The item name is 1110 · Rim. Below the item name is a navigation bar with links: Process, Approve, Posting, Order, Acumens StarterPack, Actions, Related, Reports, Fewer options, and a help icon. The 'Costs & Posting' link is highlighted with a red asterisk. The main content area includes sections for Prices & Sales (0.00), Replenishment (Purchase), Planning (Fixed Reorder Qty. None), Item Tracking, and Warehouse. The Acumens StarterPack section contains an 'Extended Global Dimension' table with columns for Department Code, Project Code, Customergroup Code, Area Code, Businessgroup Code, Salescampaign Code, Salesperson Code, and Purchaser Code. To the right of this table is a 'Taxability' section, which is highlighted with a red box. This section includes dropdowns for Product Taxability (Standard), Resource Filter Type, Taxability Product Filter, and Ship-to State Filter.

Extended Global Dimension	
Department Code .....	dropdown
Project Code .....	dropdown
Customergroup Code .....	dropdown
Area Code .....	dropdown
Businessgroup Code .....	dropdown
Salescampaign Code .....	dropdown
Salesperson Code .....	dropdown
Purchaser Code .....	dropdown

Taxability	
Product Taxability .....	dropdown (Standard)
Resource Filter Type .....	dropdown
Taxability Product Filter .....	dropdown
Ship-to State Filter .....	dropdown

Resource:

The screenshot shows a resource card for 'KATHERINE · Katherine Hull'. The card has a header with a back arrow, the resource name, a save icon, and a 'Saved' status. Below the header are tabs for 'Process', 'Report', 'Approve', 'Release', 'Posting', 'Prepare', 'Acumens StarterPack', and 'More options'. The 'Acumens StarterPack' tab is selected. Under this tab, there are sections for 'General' (Person, HOUR), 'Invoicing' (LABOR, SERVICES), and 'Personal Data'. A red box highlights the 'Acumens StarterPack' section, which contains settings for 'Taxability' including 'Resource Taxability' (Standard), 'Product Filter Type', 'Taxability Resource Filter', 'Auto-add to Order' (a toggle switch), and '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.

SalesTax Settlement Journal   Work Date: 1/28/2024											
<span>Search</span> <span>Sales Tax</span> <span>Generate SalesTax Report</span> <span>Close Entries</span>											
<span>SalesTax Periods</span> <span>Batch Name</span> <span>SALESTAX</span> <span>...</span>											
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 Ren...
1	GA	ATLANTA, GA	Invoice	RI100003	GA	GAFULTON	10000	3/30/2023	MATERIALS	<input type="checkbox"/>	ATLANTA, GA
2	GA	ATLANTA, GA	Invoice	RI100003	GA	GAFULTON	10000	3/30/2023	MATERIALS	<input type="checkbox"/>	ATLANTA, GA
3	GA	ATLANTA, GA	Credit Memo	RCM200000	GA	GAFULTON	10000	3/1/2023	MATERIALS	<input type="checkbox"/>	ATLANTA, GA
4	GA	ATLANTA, GA	Credit Memo	RCM200002	GA	GAFULTON	10000	3/30/2023	MATERIALS	<input type="checkbox"/>	ATLANTA, GA
5	GA	ATLANTA, GA	Credit Memo	RCM200002	GA	GAFULTON	10000	3/30/2023	MATERIALS	<input type="checkbox"/>	ATLANTA, GA

## Sample Report Output:

Reported Entries are closed using the page action below:

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 Liable	Description
1	GA	ATLANTA, GA	Invoice	R1100003	GA	GAFULTON	10000	3/30/2023	MATERIALS	ATLANTA, GA	ATLANTA, GA	ATLANTA, GA	ATLANTA, GA	ATLANTA, GA
2	GA	ATLANTA, GA	Invoice	R1100003	GA	GAFULTON	10000	3/30/2023	MATERIALS	ATLANTA, GA	ATLANTA, GA	ATLANTA, GA	ATLANTA, GA	ATLANTA, GA
3	GA	ATLANTA, GA	Credit Memo	RCM200000	GA	GAFULTON	10000	3/1/2023	MATERIALS	ATLANTA, GA	ATLANTA, GA	ATLANTA, GA	ATLANTA, GA	ATLANTA, GA
4	GA	ATLANTA, GA	Credit Memo	RCM200002	GA	GAFULTON	10000	3/30/2023	MATERIALS	ATLANTA, GA	ATLANTA, GA	ATLANTA, GA	ATLANTA, GA	ATLANTA, GA
5	GA	ATLANTA, GA	Credit Memo	RCM200002	GA	GAFULTON	10000	3/30/2023	MATERIALS	ATLANTA, GA	ATLANTA, GA	ATLANTA, GA	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:

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
→ G/L Account	63400		Sales Tax	1		100.00	T01	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:

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	0.0
CA	SUPPLIES	Sales and Use Tax	1/25/2024	6.5	0.00	0.0	0.0
FF	SALESTAX	Sales and Use Tax	1/25/2024	0.0	0.00	0.0	0.0
FF	SUPPLIES	Sales and Use Tax	1/25/2024	1.0	0.00	0.0	0.0
FFO	SALESTAX	Sales and Use Tax	1/25/2024	0.0	0.00	0.0	0.0
FFO	SUPPLIES	Sales and Use Tax	1/25/2024	0.25	0.00	0.0	0.0
FFS	SALESTAX	Sales and Use Tax	1/25/2024	0.0	0.00	0.0	0.0
FFS	SUPPLIES	Sales and Use Tax	1/25/2024	0.5	0.00	0.0	0.0
SL	SALESTAX	Sales and Use Tax	1/25/2024	0.0	0.00	0.0	0.0
SL	SUPPLIES	Sales and Use Tax	1/25/2024	1.0	0.00	0.0	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	
2	ATLANTA, GA	103015	902.97	0.00	27.09	0.00	27.09	0.00	0.00	0.00	0.00	27.09	0.00	0.00	0.00	0.00	GA	
3	ATLANTA, GA	103015	9,292.05	0.00	278.76	0.00	278.76	0.00	0.00	0.00	0.00	278.76	0.00	0.00	0.00	0.00	GA	
4	CHICAGO, IL	103018	970.78	0.00	29.12	0.00	29.12	0.00	0.00	0.00	0.00	29.12	0.00	0.00	0.00	0.00	IL	
5	MIAMI, FL	103031	527.70	0.00	15.83	0.00	15.83	0.00	0.00	0.00	0.00	15.83	0.00	0.00	0.00	0.00	FL	
6	MIAMI, FL	103031	533.60	0.00	16.01	0.00	16.01	0.00	0.00	0.00	0.00	16.01	0.00	0.00	0.00	0.00	FL	
7	CHICAGO, IL	103020	266.26	0.00	7.99	0.00	7.99	0.00	0.00	0.00	0.00	7.99	0.00	0.00	0.00	0.00	IL	
8	ATLANTA, GA	103026	4,560.00	0.00	135.00	0.00	135.00	0.00	0.00	0.00	0.00	135.00	0.00	0.00	0.00	0.00	GA	
9	ATLANTA, GA	103028	557.00	0.00	11.14	0.00	11.14	0.00	0.00	0.00	0.00	11.14	0.00	0.00	0.00	0.00	GA	
10	ATLANTA, GA	103029	1,571.25	0.00	49.62	0.00	49.62	0.00	0.00	0.00	0.00	49.62	0.00	0.00	0.00	0.00	GA	
11	ATLANTA, GA	103031	9,462.00	0.00	294.62	0.00	294.62	0.00	0.00	0.00	0.00	294.62	0.00	0.00	0.00	0.00	GA	
12	CHICAGO, IL	103002	2,012.75	0.00	20.13	0.00	20.13	0.00	0.00	0.00	0.00	20.13	0.00	0.00	0.00	0.00	IL	
13	CHICAGO, IL	103002	7,728.96	0.00	77.29	0.00	77.29	0.00	0.00	0.00	0.00	77.29	0.00	0.00	0.00	0.00	IL	
14	MIAMI, FL	103003	2,075.00	0.00	20.75	0.00	20.75	0.00	0.00	0.00	0.00	20.75	0.00	0.00	0.00	0.00	FL	
15	MIAMI, FL	103003	6,308.00	0.00	63.08	0.00	63.08	0.00	0.00	0.00	0.00	63.08	0.00	0.00	0.00	0.00	FL	
16	MIAMI, FL	103023	768.60	0.00	23.00	0.00	23.00	0.00	0.00	0.00	0.00	23.00	0.00	0.00	0.00	0.00	FL	
17	MIAMI, FL	103023	1,502.30	0.00	45.07	0.00	45.07	0.00	0.00	0.00	0.00	45.07	0.00	0.00	0.00	0.00	FL	
18	MIAMI, FL	103023	190.10	0.00	5.70	0.00	5.70	0.00	0.00	0.00	0.00	5.70	0.00	0.00	0.00	0.00	FL	
19	CHICAGO, IL	103024	1,412.13	0.00	42.36	0.00	42.36	0.00	0.00	0.00	0.00	42.36	0.00	0.00	0.00	0.00	IL	
21	T01	Invoice	103033	0.00	0.00	100.00	0.00	81.08	0.00	18.92	0.00	70.27	10.81	5.41	2.70	CA		
22	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
23	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
25			<b>Totals</b>	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.

The screenshot shows the Microsoft Dynamics 365 Customer Card for '10000 · The Cannon Group PLC'. The card includes sections for Extended Global Dimension, Alternate Ship-to Address, and a detailed view of customer balances.

**Extended Global Dimension**

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

**Alternate Ship-to Address**

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...	

**Balances**

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
<b>Inv. Amounts (\$)</b>	44,812.86
Specifies the value of the Inv. Amounts (\$) field.	0.00
<i>Learn more</i>	

## 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](mailto:billing@cronususa.com)

Check our products and services at [www.cronususa.com](http://www.cronususa.com)

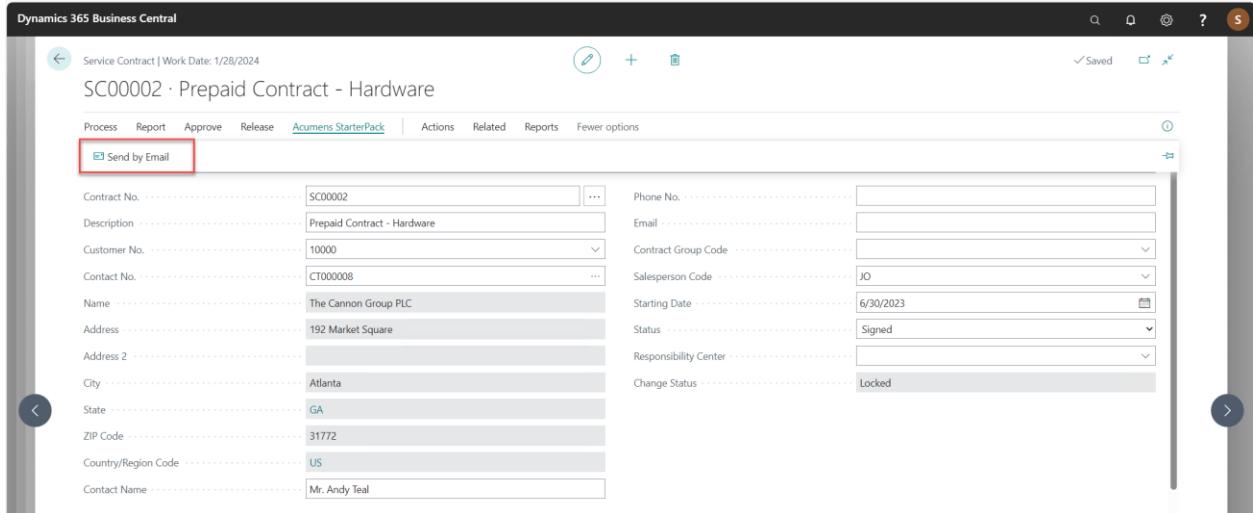
### 1.5.2. Service Document Templates

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.

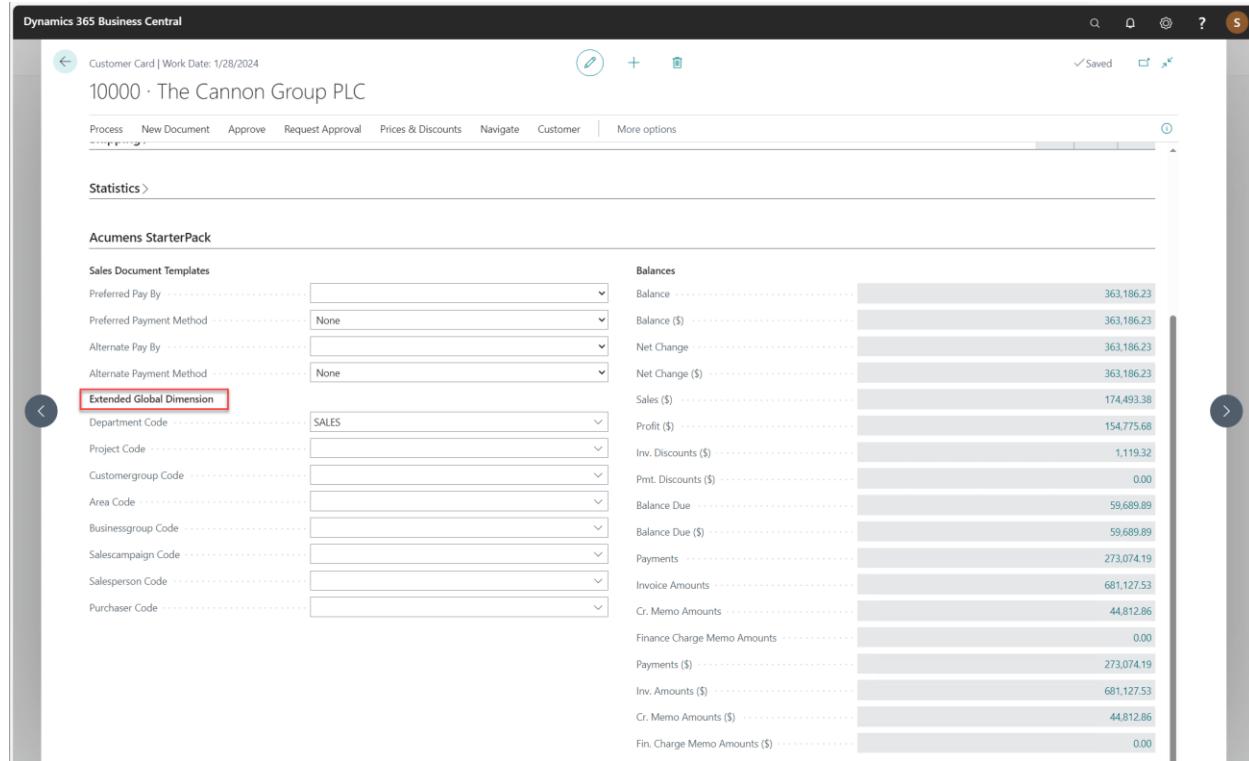


The screenshot shows the Dynamics 365 Business Central interface for a Service Contract. The title bar indicates 'Service Contract | Work Date: 1/28/2024'. The main area displays a form for 'SC00002 · Prepaid Contract - Hardware'. The 'Actions' tab is selected, showing options like 'Process', 'Report', 'Approve', 'Release', 'Acumens StarterPack', 'Actions', 'Related', 'Reports', and 'Fewer options'. A red box highlights the 'Send by Email' button, which is located in the 'Actions' section of the ribbon. The form contains various fields for contract details, such as Contract No. (SC00002), Description (Prepaid Contract - Hardware), Customer No. (10000), Contact No. (CT000008), Name (The Cannon Group PLC), Address (192 Market Square), Address 2 (Atlanta), City (GA), ZIP Code (31772), Country/Region Code (US), and Contact Name (Mr. Andy Teal). To the right of these fields are additional fields: Phone No., Email, Contract Group Code, Salesperson Code (JO), Starting Date (6/30/2023), Status (Signed), Responsibility Center, and Change Status (Locked). The interface includes standard navigation buttons (back, forward, search, etc.) and a vertical scroll bar on the right.

## 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:



The screenshot shows the Dynamics 365 Business Central Customer Card for '10000 · The Cannon Group PLC'. The card displays various settings and a balance sheet.

**Sales Document Templates:**

- Preferred Pay By: [dropdown]
- Preferred Payment Method: None
- Alternate Pay By: [dropdown]
- Alternate Payment Method: None

**Extended Global Dimension:** (highlighted with a red box)

- Department Code: SALES
- Project Code: [dropdown]
- Customergroup Code: [dropdown]
- Area Code: [dropdown]
- Businessgroup Code: [dropdown]
- Salescampaign Code: [dropdown]
- Salesperson Code: [dropdown]
- Purchaser Code: [dropdown]

**Statistics > Acumens StarterPack:**

**Balances:**

Category	Value
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
Pmt. 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

10000 · London Postmaster

General > London Postmaster

Address & Contact > 31772 Mrs. Carol Philips

Invoicing >

Payments > CM

Receiving > CIF

Acumens StarterPack

Department Code: [dropdown] Businessgroup Code: [dropdown]  
 Project Code: [dropdown] Salescampaign Code: [dropdown]  
 Customergroup Code: [dropdown] Salesperson Code: [dropdown]  
 Area Code: [dropdown] Purchaser Code: [dropdown]

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
0	0	0
0	4	4

## Item:

Dynamics 365 Business Central

Cronus Armada Rental

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 contacts... Enab... | Don't ask again

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: [dropdown] Businessgroup Code: [dropdown]  
 Project Code: [dropdown] Salescampaign Code: [dropdown]  
 Customergroup Code: [dropdown] Salesperson Code: [dropdown]  
 Area Code: [dropdown] Purchaser Code: [dropdown]

Attachments (0)

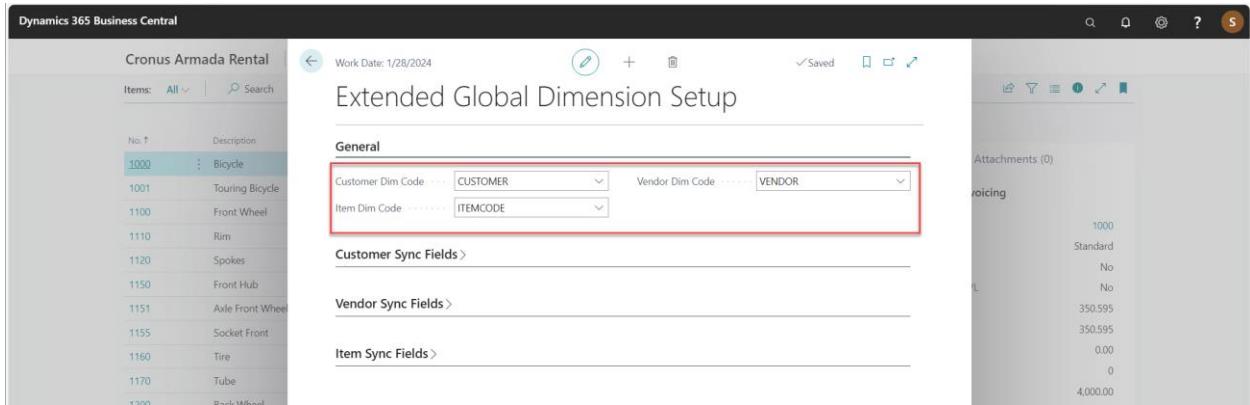
Prices & Sales

1000 Standard  
 No No  
 350.595 350.595  
 0.00 0.00  
 4,000.00 4,000.00  
 91,235.13 4,000.00

Planning

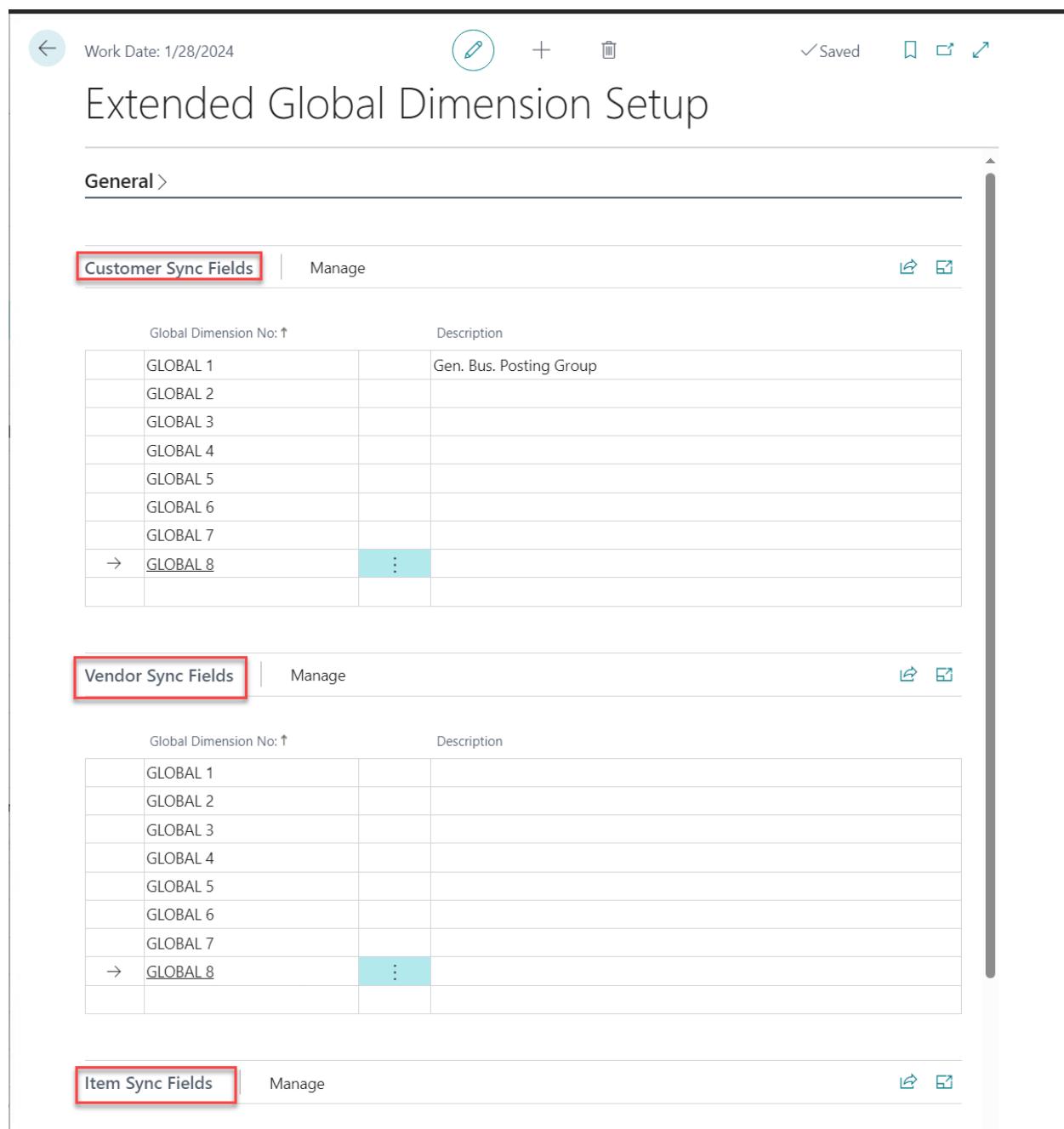
1000 Fixed Reorder Qty:  
 0 100  
 0 0  
 1W 1W

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.



The screenshot shows the Dynamics 365 Business Central interface for 'Extended Global Dimension Setup'. The main title is 'Extended Global Dimension Setup'. The 'General' section is highlighted with a red box, containing three dropdown menus: 'Customer Dim Code' (set to 'CUSTOMER'), 'Vendor Dim Code' (set to 'VENDOR'), and 'Item Dim Code' (set to 'ITEMCODE'). Below this are sections for 'Customer Sync Fields', 'Vendor Sync Fields', and 'Item Sync Fields'. On the left, a list of items is visible, including '1000 Bicycle', '1001 Touring Bicycle', '1100 Front Wheel', '1110 Rim', '1120 Spokes', '1150 Front Hub', '1151 Axle Front Wheel', '1155 Socket Front', '1160 Tire', and '1170 Tube'. The right side of the screen shows a detailed view of item 1000, including fields like 'Standard' (No), 'No', '350.595', '350.595', '0.00', '0', and '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

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

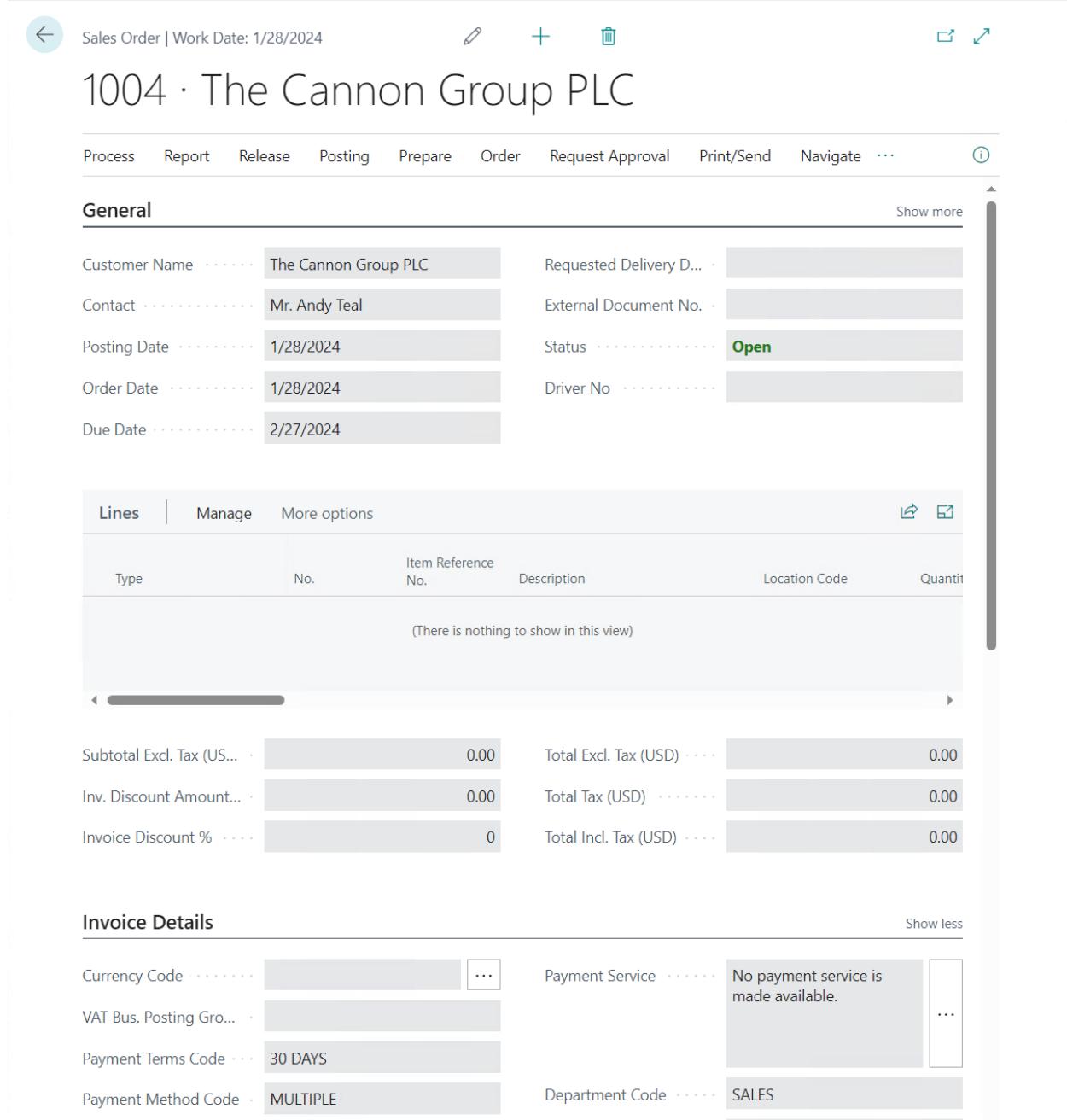
Global Dimension No:	Description
GLOBAL 1	
GLOBAL 2	
GLOBAL 3	
GLOBAL 4	
GLOBAL 5	
GLOBAL 6	
GLOBAL 7	
→ GLOBAL 8	:

**Item Sync Fields** | Manage

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

## 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.



The screenshot shows a Sales Order page for Order Number 1004, titled "The Cannon Group PLC". The page includes a header with navigation icons and a toolbar with various buttons. The main content is divided into sections: "General", "Lines", and "Invoice Details".

**General Section:**

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

**Lines Section:**

(There is nothing to show in this view)

**Invoice Details Section:**

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

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 .....
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)					

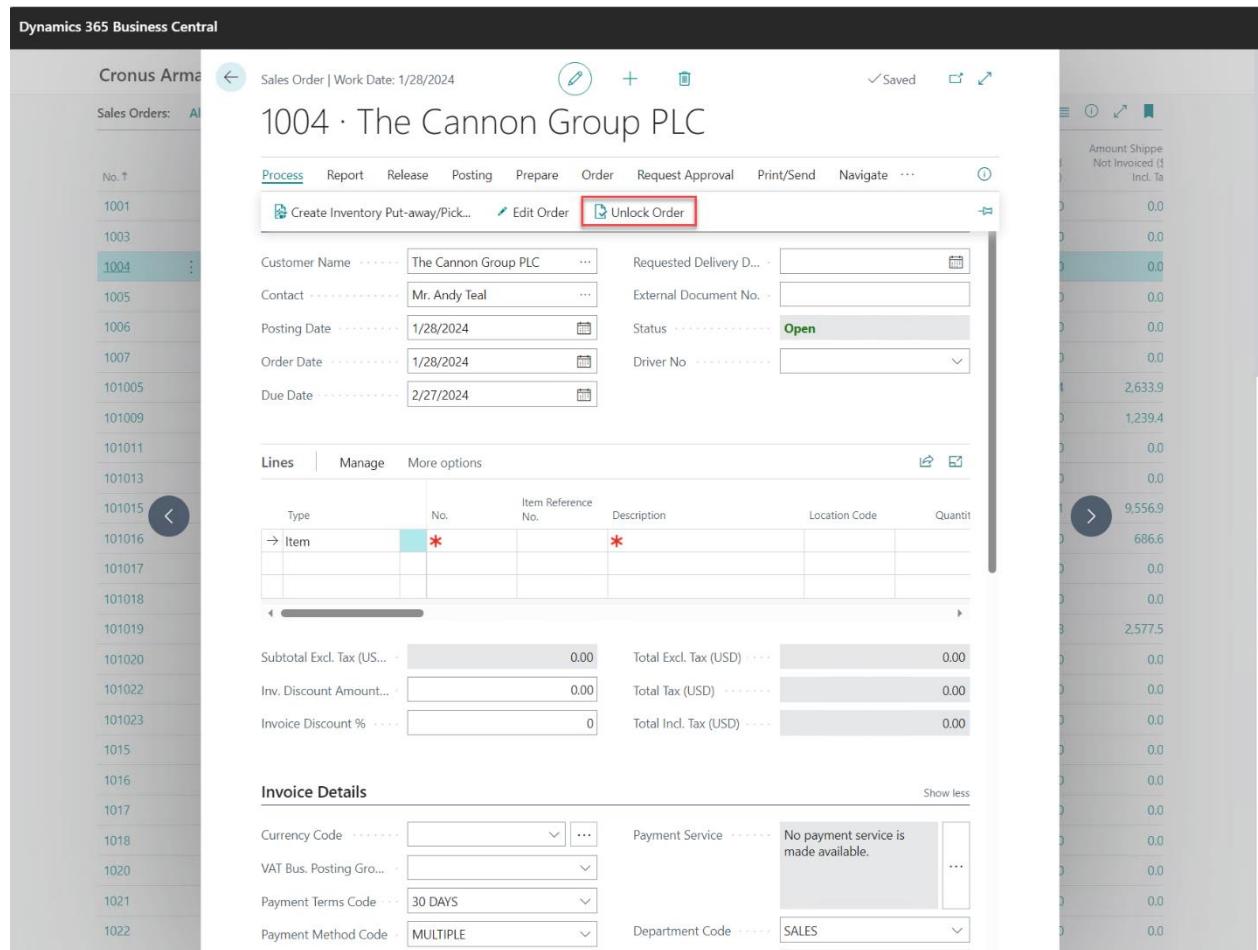
Subtotal Excl. Tax (US... .	0.00	Total Excl. Tax (USD) .....	0.00
Inv. Discount Amount... .	0.00	Total Tax (USD) .....	0.00
Invoice Discount % .....	0	Total Incl. Tax (USD) .....	0.00

## Invoice Details

Show less

Currency Code .....	<input type="button" value="..."/>	Payment Service .....	No payment service is made available.
VAT Bus. Posting Gro... .	<input type="button" value="..."/>		<input type="button" value="..."/>
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”

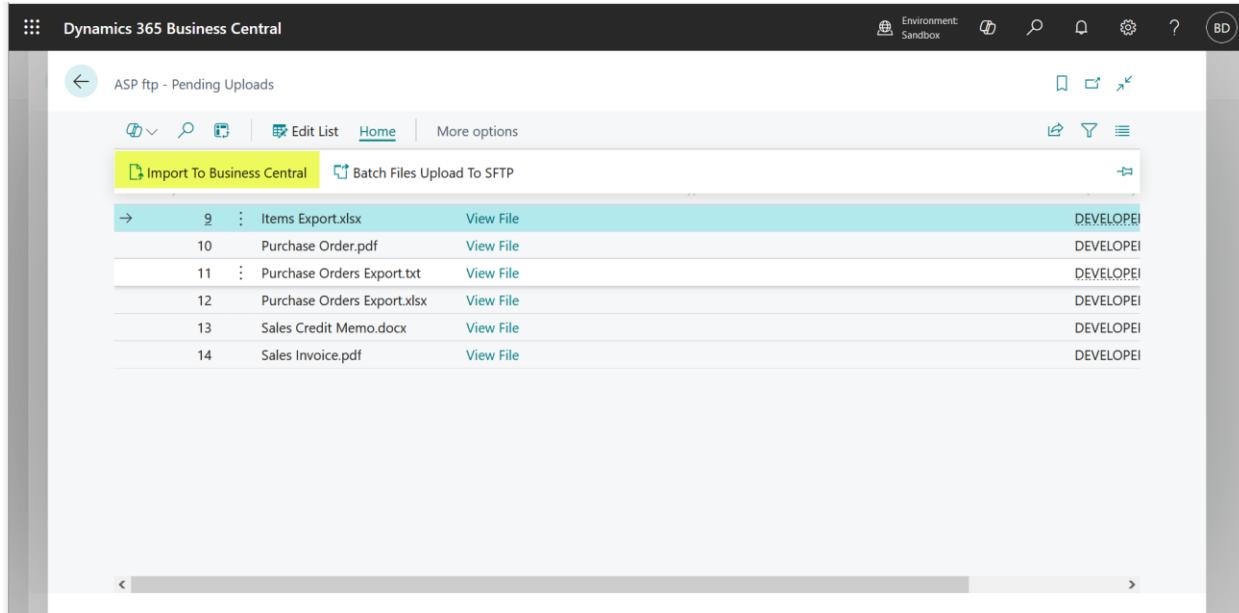


## 1.8. User Driven FTP File uploads.

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

ASP provides the functionalities below.

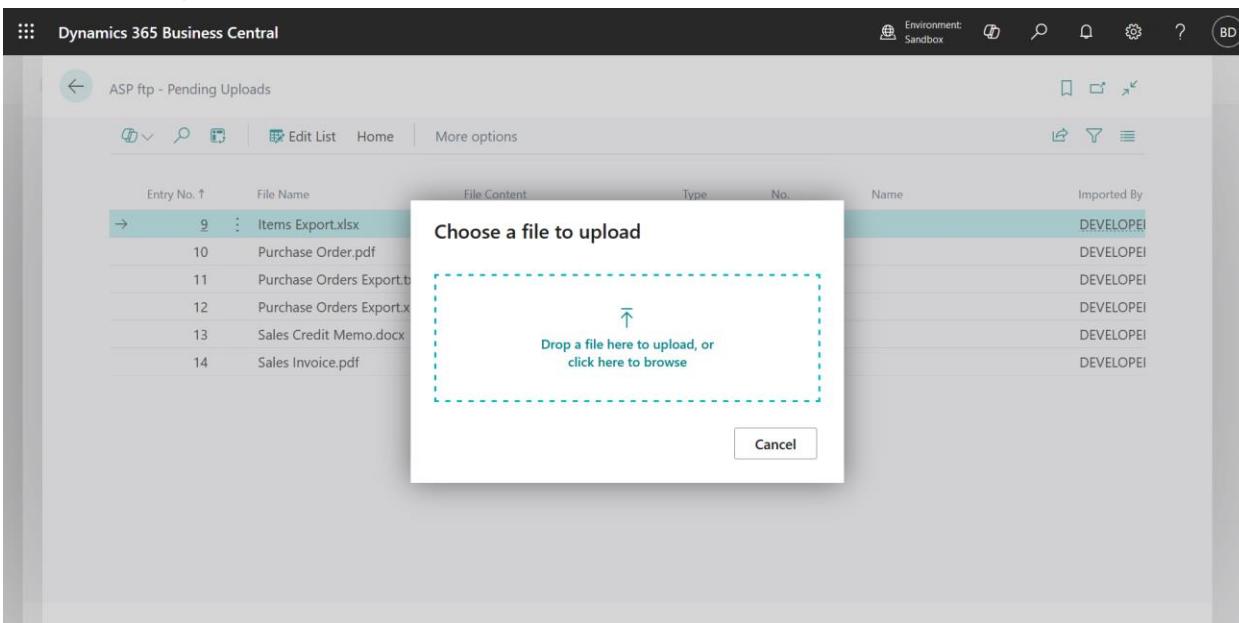
- Upload files. You can Upload documents with storage multiple storage Options i.e. you can choose to store uploaded documents on BC app as media or on Azure Storage.



The screenshot shows the Dynamics 365 Business Central interface with the title 'Dynamics 365 Business Central'. The page is titled 'ASP ftp - Pending Uploads'. At the top, there are buttons for 'Edit List', 'Home', and 'More options'. Below this is a table with columns: 'Entry No.', 'File Name', 'Type', and 'Imported By'. The table contains the following data:

Entry No.	File Name	Type	Imported By
9	Items Export.xlsx	View File	DEVELOPEI
10	Purchase Order.pdf	View File	DEVELOPEI
11	Purchase Orders Export.txt	View File	DEVELOPEI
12	Purchase Orders Export.xlsx	View File	DEVELOPEI
13	Sales Credit Memo.docx	View File	DEVELOPEI
14	Sales Invoice.pdf	View File	DEVELOPEI

Drop a file or browse to select a file to upload. Only PDF, Word, Excel, Text, and CSV formats are allowed for import.



The screenshot shows the Dynamics 365 Business Central interface with the title 'Dynamics 365 Business Central'. The page is titled 'ASP ftp - Pending Uploads'. At the top, there are buttons for 'Edit List', 'Home', and 'More options'. Below this is a table with columns: 'Entry No.', 'File Name', 'File Content', 'Type', 'No.', 'Name', and 'Imported By'. The table contains the following data:

Entry No.	File Name	File Content	Type	No.	Name	Imported By
9	Items Export.xlsx	Choose a file to upload				DEVELOPEI
10	Purchase Order.pdf					DEVELOPEI
11	Purchase Orders Export.txt					DEVELOPEI
12	Purchase Orders Export.xlsx					DEVELOPEI
13	Sales Credit Memo.docx					DEVELOPEI
14	Sales Invoice.pdf					DEVELOPEI

A modal dialog box is open in the center of the screen, titled 'Choose a file to upload'. It contains a dashed blue rectangular area for file drop, with the text 'Drop a file here to upload, or click here to browse' below it. At the bottom right of the dialog is a 'Cancel' button.

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

ASP ftp - Pending Uploads

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

c. Batch upload files to the SFTP remote Folder.

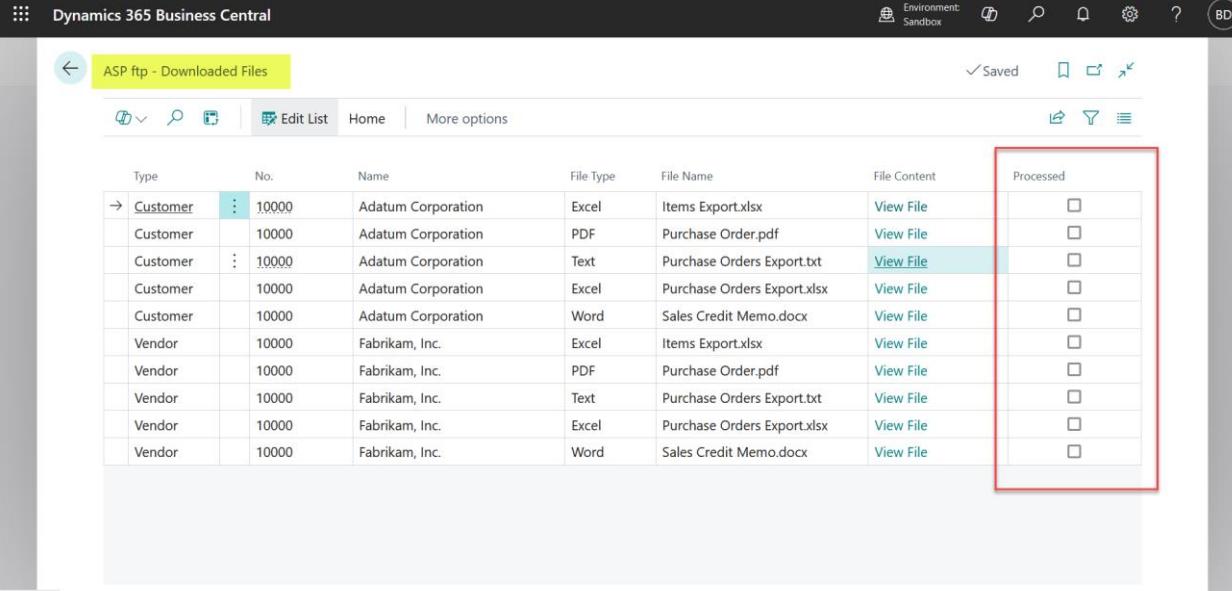
ASP ftp - Pending Uploads

[Import To Business Central](#) [Batch Upload To SFTP](#)

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

d. Download uploaded file for review.

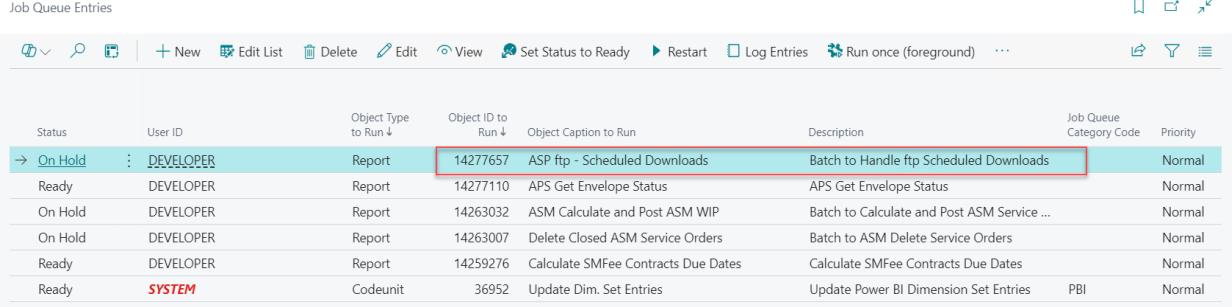
This can be done either manually or scheduled via a batch.



The screenshot shows a Dynamics 365 Business Central list titled "ASP ftp - Downloaded Files". The columns are: Type, No., Name, File Type, File Name, File Content, and Processed. The "Processed" column is highlighted with a red box. The data includes various file types (Excel, PDF, Text, Word) and names (Adatum Corporation, Purchase Order, Sales Credit Memo, etc.) for different customers and vendors.

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

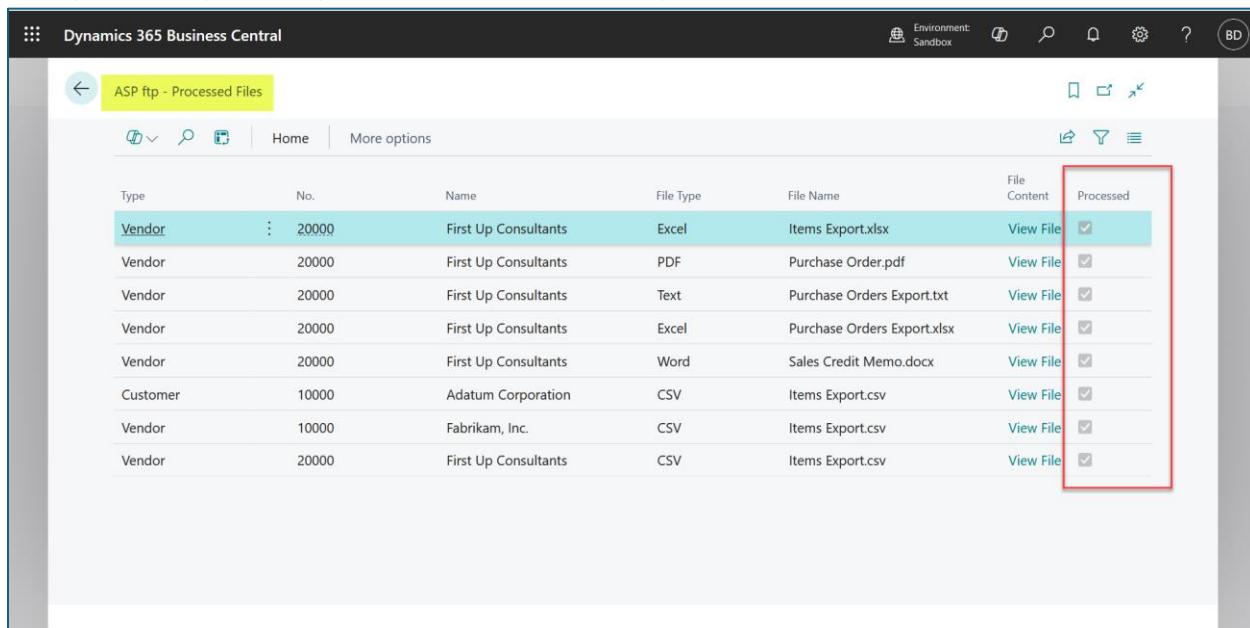
Schedule files to download automatically via a batch on the job queue.



The screenshot shows the "Job Queue Entries" list. The columns are: Status, User ID, Object Type to Run, Object ID to Run, Object Caption to Run, Description, Job Queue Category Code, and Priority. A red box highlights the "Object ID to Run" column for the first entry, which is "14277657". The entry description is "Batch to Handle ftp Scheduled Downloads".

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.

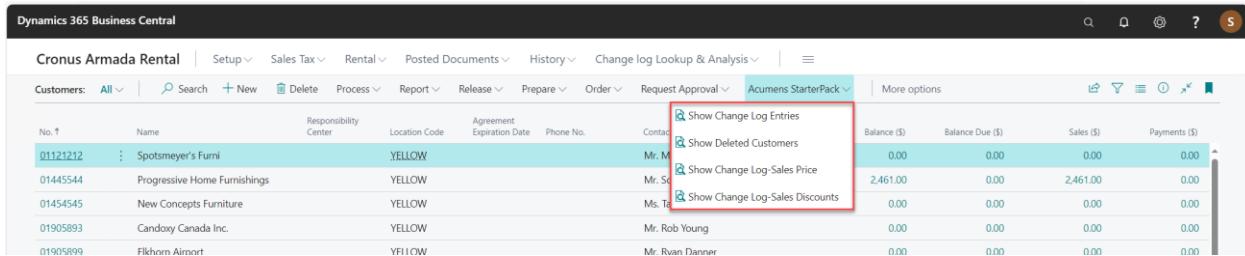


The screenshot shows a Dynamics 365 Business Central interface with the title bar "Dynamics 365 Business Central" and "Environment: Sandbox". The current page is "ASP ftp - Processed Files". The page displays a list of uploaded documents with the following columns: Type, No., Name, File Type, File Name, and File Content. The "File Content" column contains a "Processed" status with a checkmark and a "View File" link. A red box highlights the "Processed" column. The data in the table is as follows:

Type	No.	Name	File Type	File Name	File Content
Vendor	20000	First Up Consultants	Excel	Items Export.xlsx	Processed <input checked="" type="checkbox"/> View File
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 'Customers' list. The top navigation bar includes 'Setup', 'Sales Tax', 'Rental', 'Posted Documents', 'History', 'Change log Lookup & Analysis', and 'Acumens StarterPack'. The 'Customers' list view shows several records, with the first record (No. 01121212, Spotsmeyer's Furni) selected. A context menu is open over this record, with the 'Show Change Log Entries' option highlighted and surrounded by a red box. Other options in the menu include 'Show Deleted Customers', 'Show Change Log-Sales Price', and 'Show Change Log-Sales Discounts'. To the right of the list, a summary table displays financial data: Balance (\$), Balance Due (\$), Sales (\$), and Payments (\$). The summary table shows a total of 2,461.00 for Sales and 0.00 for Payments.

Documents which include the below:

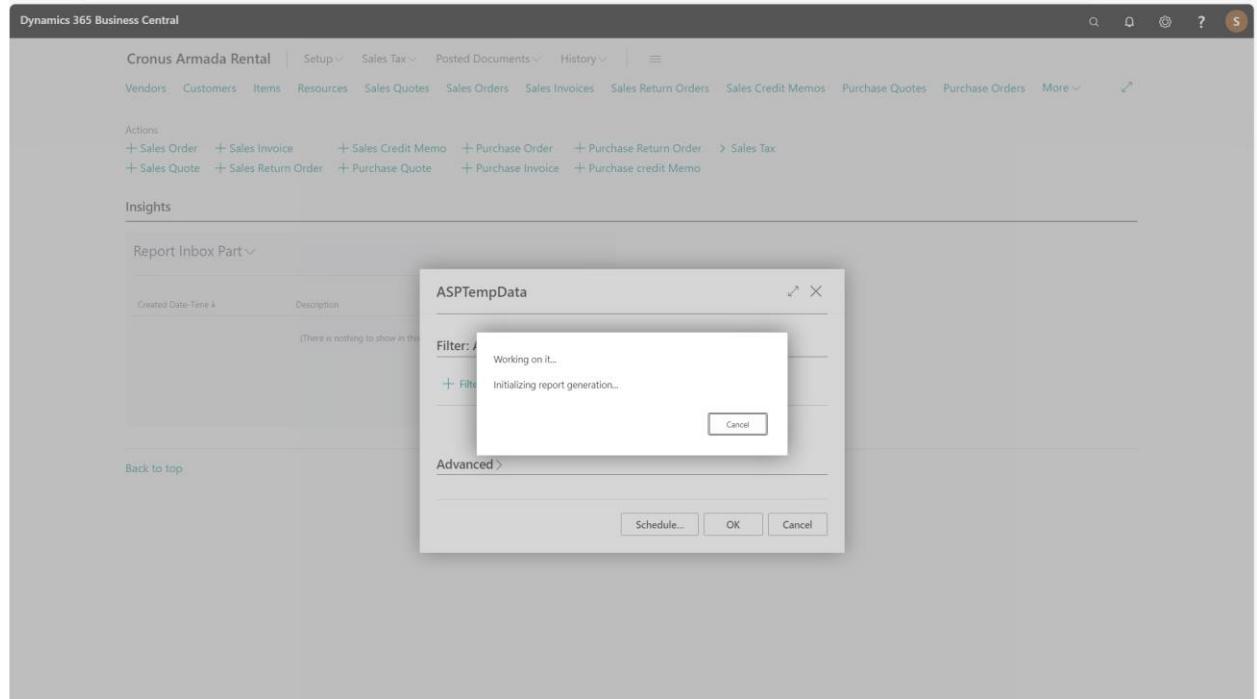
- Customers
- Vendors
- Items
- Insurance Policies
- Machine Centers
- Fixed Assets
- Bank Accounts
- Stockkeeping Units
- Jobs
- Contacts
- Service Items
- Comments (Sales)
- Comments (Stockkeeping Units)
- Production BOMs / Production BOM
- Prod. BOM Version List
- Routings / Routing
- Routing Version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

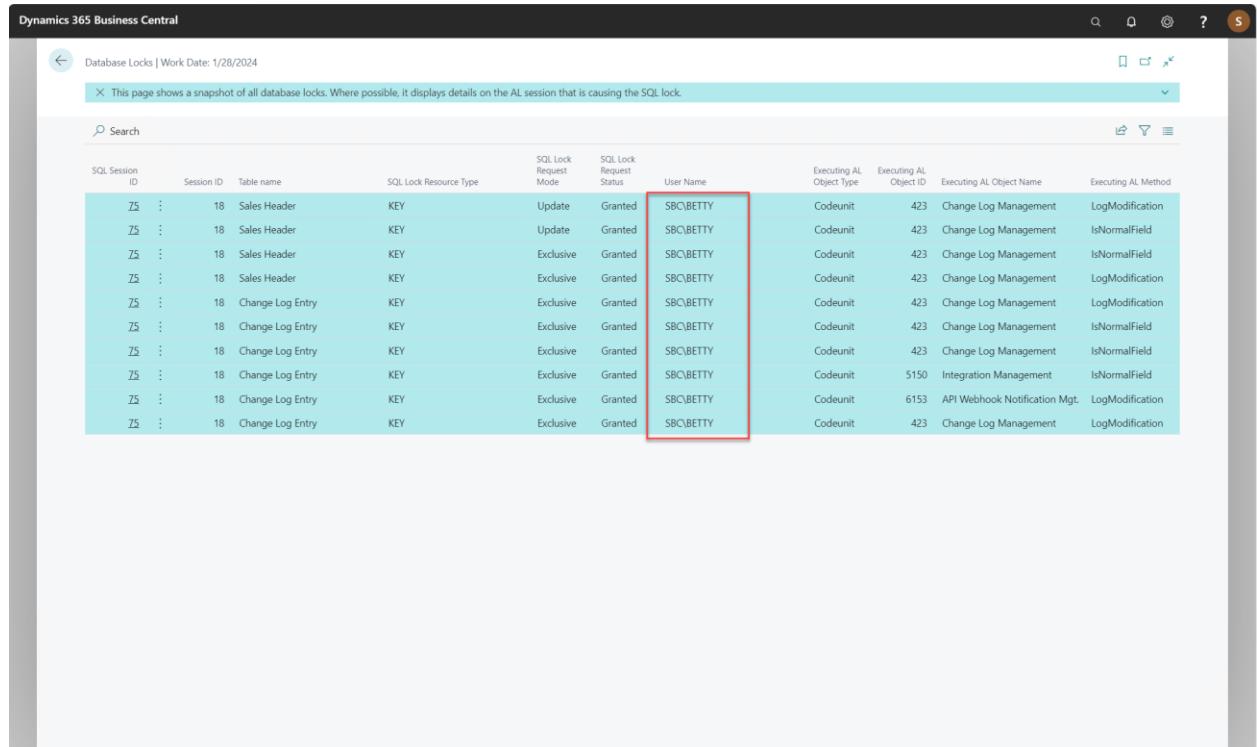
## 1.10. Table Lock Analysis

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:



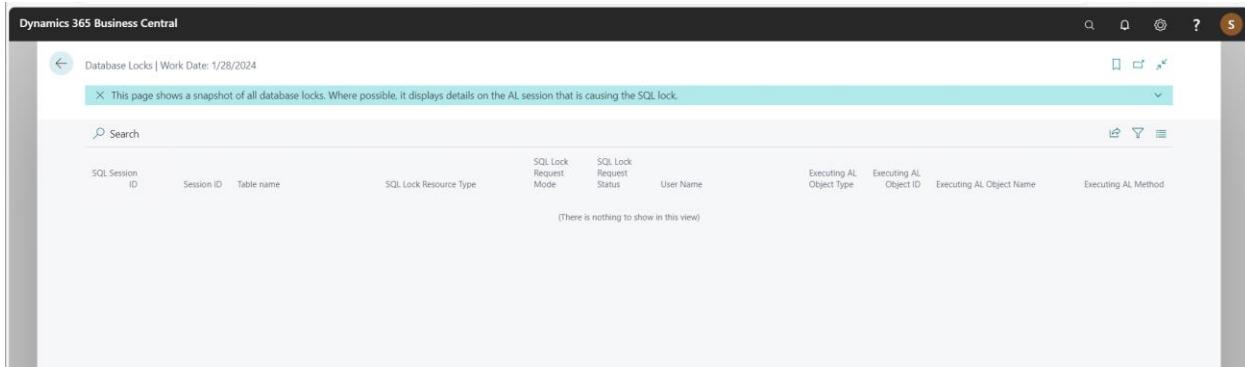
The screenshot shows a Dynamics 365 Business Central interface. A modal dialog box is centered, titled 'ASPTempData'. It contains a message 'Working on it...' and 'Initializing report generation...'. Below the message are 'Cancel', 'Schedule...', 'OK', and 'Cancel' buttons. The background shows a list of actions and an 'Insights' section.



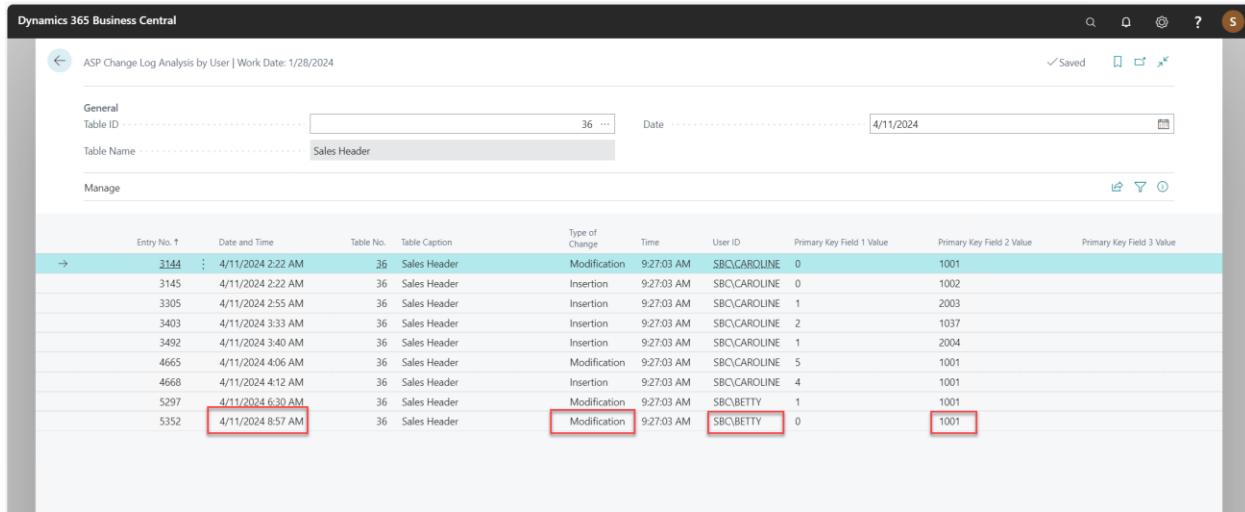
The screenshot shows the 'Database Locks' page in Dynamics 365 Business Central. The page title is 'Database Locks | Work Date: 1/28/2024'. A message bar at the top says, 'This page shows a snapshot of all database locks. Where possible, it displays details on the AL session that is causing the SQL lock.' The main table lists database locks with the following data:

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:

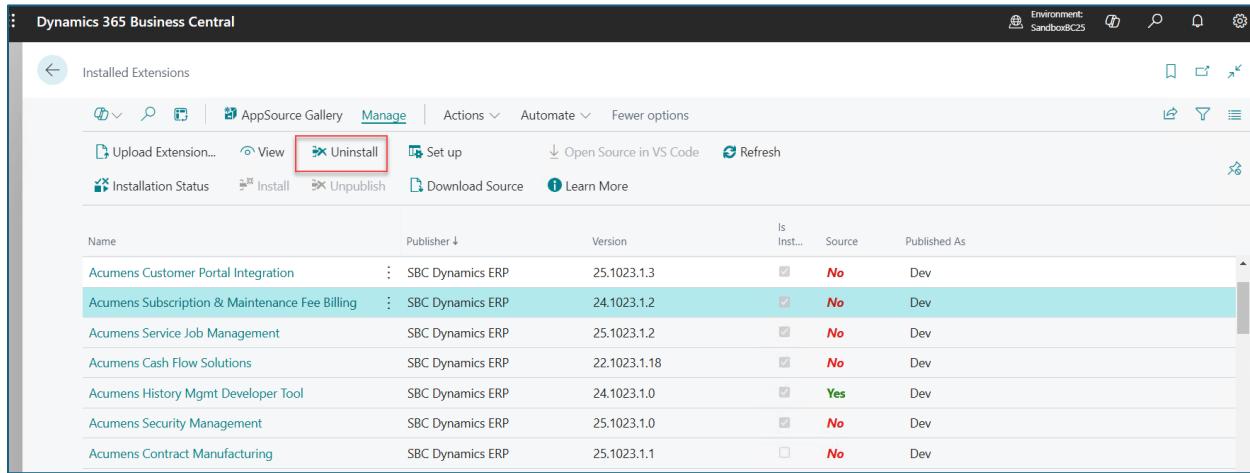


Analysis can be done for a select list of Tables (user defined) and date.



## 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.



Dynamics 365 Business Central

Installed Extensions

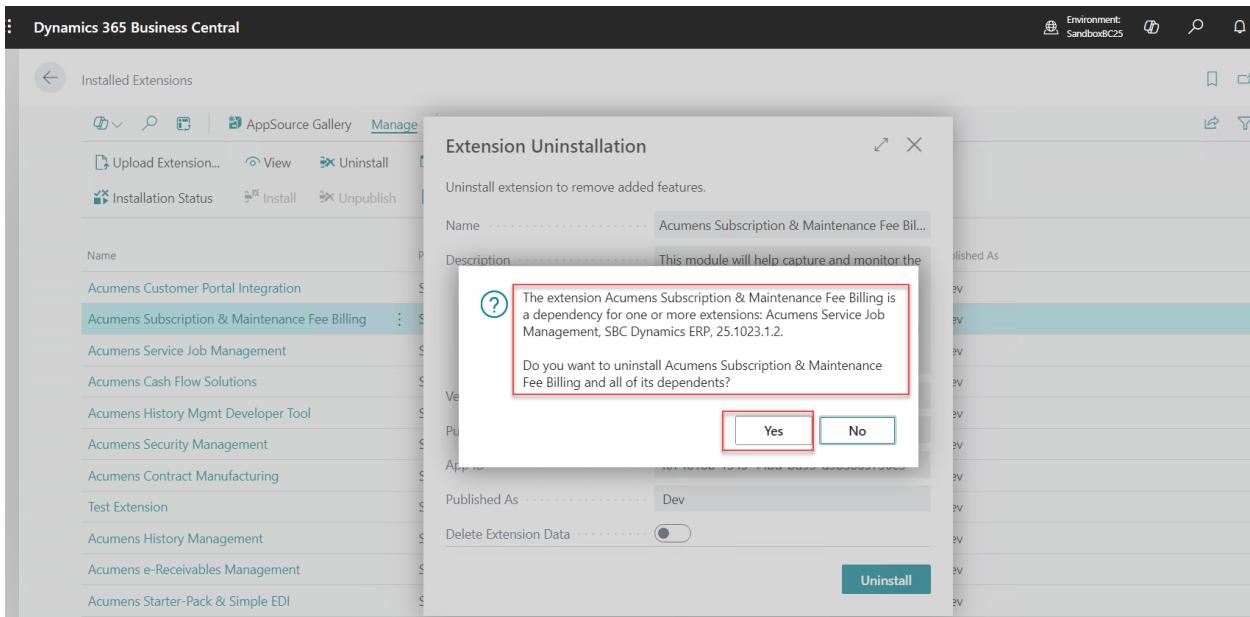
AppSource Gallery Manage

Actions Automate Fewer options

Upload Extension... View Uninstall Set up Open Source in VS Code Refresh

Installation Status Install Unpublish Download Source Learn More

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



Dynamics 365 Business Central

Installed Extensions

AppSource Gallery Manage

Upload Extension... View Uninstall

Installation Status Install Unpublish

Extension Uninstallation

Uninstall extension to remove added features.

Name: Acumens Subscription & Maintenance Fee Billing

Description: This module will help capture and monitor the

Question: The extension Acumens Subscription & Maintenance Fee Billing is a dependency for one or more extensions: Acumens Service Job Management, SBC Dynamics ERP, 25.1023.1.2.

Do you want to uninstall Acumens Subscription & Maintenance Fee Billing and all of its dependents?

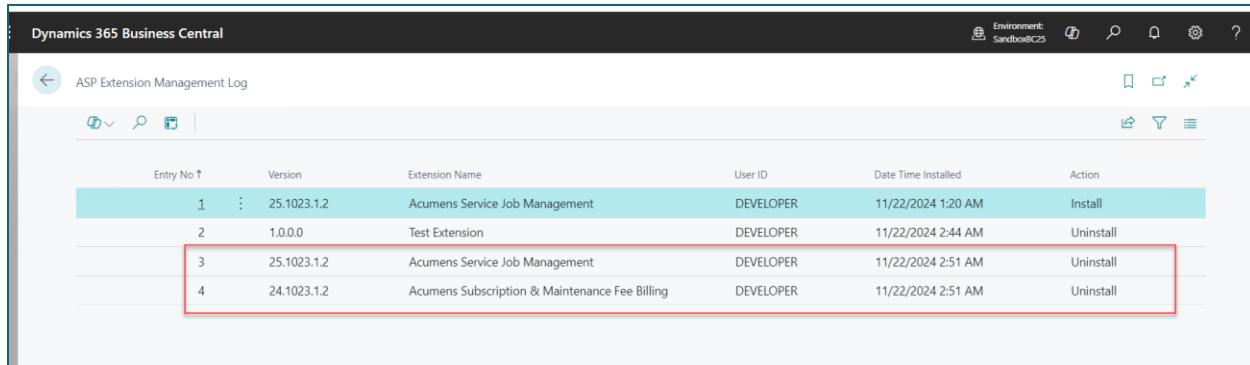
Yes No

Published As: Dev

Delete Extension Data:

Uninstall

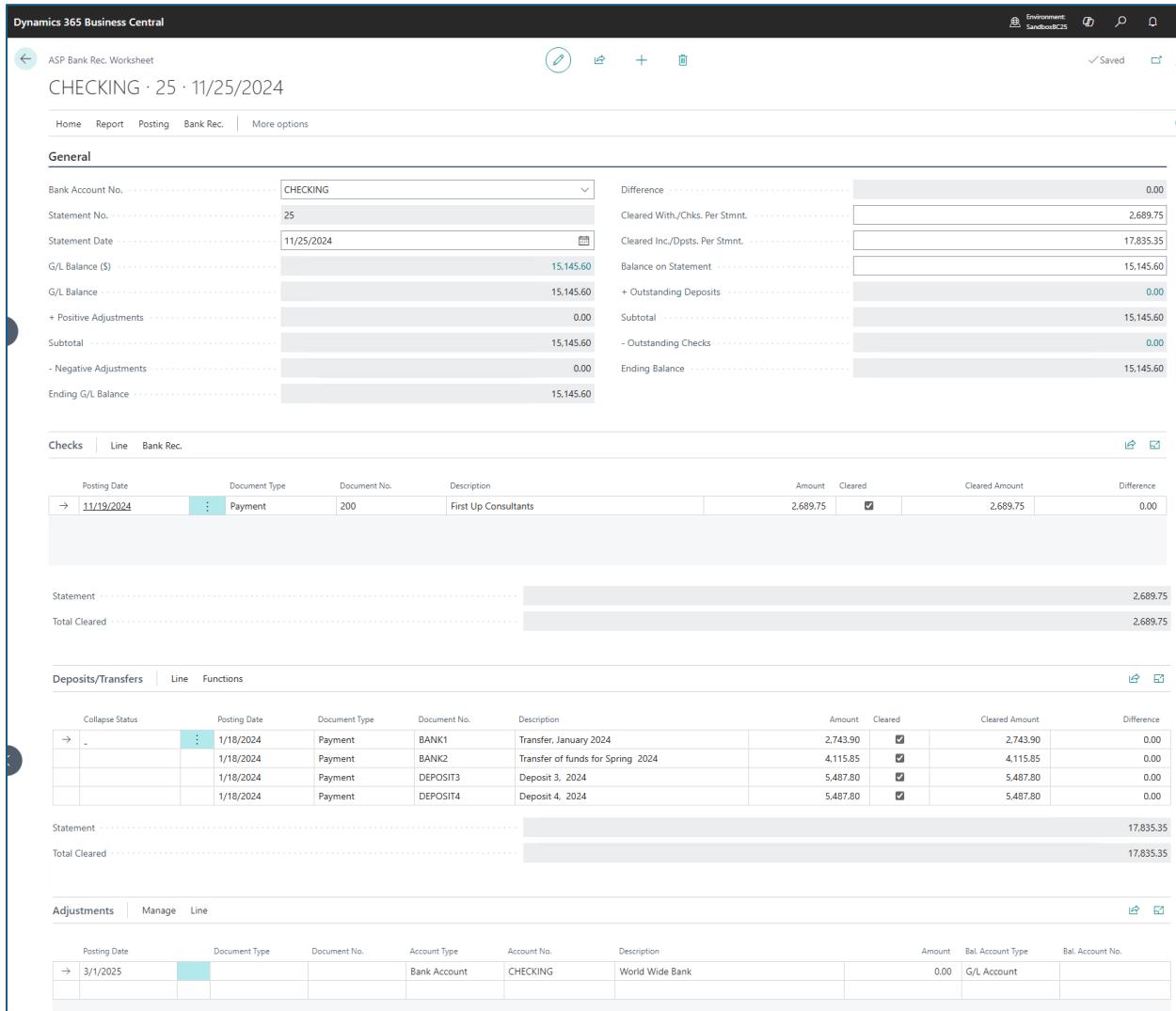
## Extension management Log.



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.



The screenshot shows the Dynamics 365 Business Central Bank Rec. Worksheet for the Checking account on 11/25/2024. The General tab displays the following data:

Field	Value	Value	Value
Bank Account No.	CHECKING	Difference	0.00
Statement No.	25	Cleared With/Chks. Per Stmt.	2,689.75
Statement Date	11/25/2024	Cleared Inc/Dpsts. Per Stmt.	17,835.35
G/L Balance (\$)	15,145.60	Balance on Statement	15,145.60
G/L Balance	15,145.60	+ Outstanding Deposits	0.00
+ Positive Adjustments	0.00	Subtotal	15,145.60
Subtotal	15,145.60	- Outstanding Checks	0.00
- Negative Adjustments	0.00	Ending Balance	15,145.60
Ending G/L Balance	15,145.60		

The Checks tab shows a list of payments:

Posting Date	Document Type	Document No.	Description	Amount	Cleared	Cleared Amount	Difference
→ 11/19/2024	Payment	200	First Up Consultants	2,689.75	<input checked="" type="checkbox"/>	2,689.75	0.00

The Statement tab shows the following totals:

Statement	2,689.75
Total Cleared	2,689.75

The Deposits/Transfers tab shows a list of deposits:

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	<input checked="" type="checkbox"/>	2,743.90	0.00
	1/18/2024	Payment	BANK2	Transfer of funds for Spring, 2024	4,115.85	<input checked="" type="checkbox"/>	4,115.85	0.00
	1/18/2024	Payment	DEPOSIT3	Deposit 3, 2024	5,487.80	<input checked="" type="checkbox"/>	5,487.80	0.00
	1/18/2024	Payment	DEPOSIT4	Deposit 4, 2024	5,487.80	<input checked="" type="checkbox"/>	5,487.80	0.00

The Statement tab shows the following totals:

Statement	17,835.35
Total Cleared	17,835.35

The Adjustments tab shows a list of adjustments:

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 image displays three screenshots of the Dynamics 365 Business Central interface, illustrating the configuration of G/L Access Permissions.

**User Setup (Top Screenshot):**

This screenshot shows the User Setup screen in Dynamics 365 Business Central. The user 'DEVELOPER' is selected. The 'View G/L' checkbox is checked, while 'Allow to edit Posted Sales Doc' and 'Adjust Approval Required' are unchecked. The 'Saved' button is visible in the top right.

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

**Chart of Accounts (Middle Screenshot):**

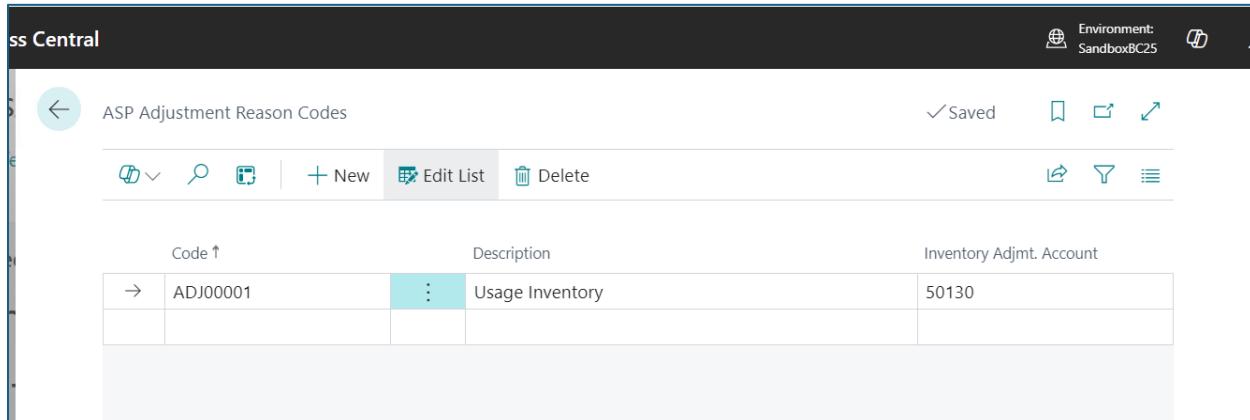
This screenshot shows the Chart of Accounts screen. The 'Chart of Accounts' section is visible, along with buttons for 'Posted Documents w... Incoming Document', 'Indent Chart of Accounts', 'Close Income Statement', and 'Review Entries'. The message '(There is nothing to show in this view)' is displayed.

**General Ledger Entries (Bottom Screenshot):**

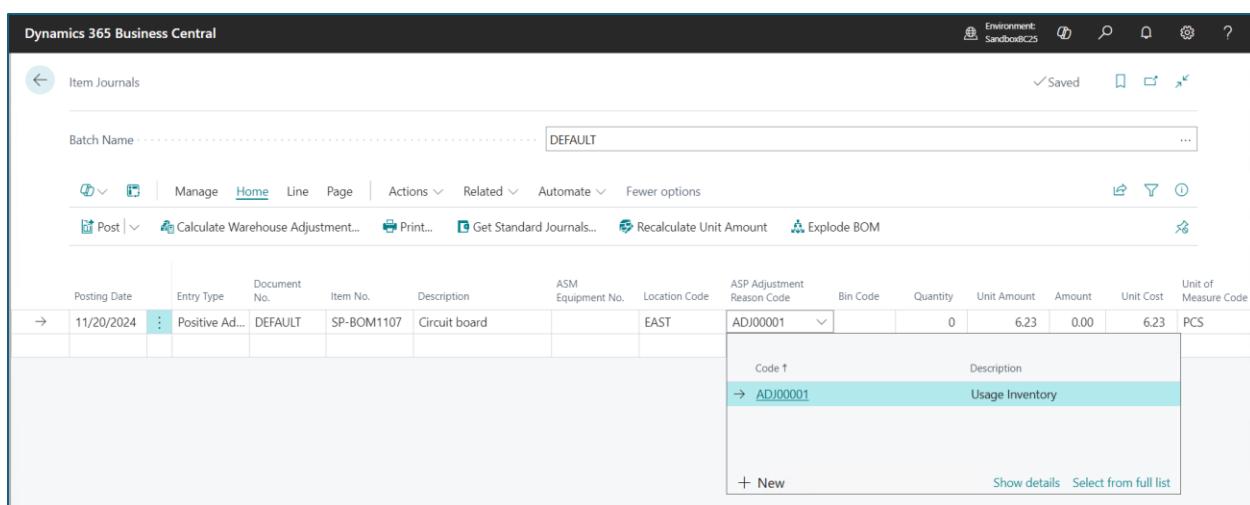
This screenshot shows the General Ledger Entries screen. The 'General Ledger Entries' section is visible, along with buttons for 'Find entries...', 'Reverse Transaction...', 'Correct Dimensions', and 'Entry'. The message '(There is nothing to show in this view)' is displayed.

## 1.14. Inventory Adjustment Reason Codes.

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

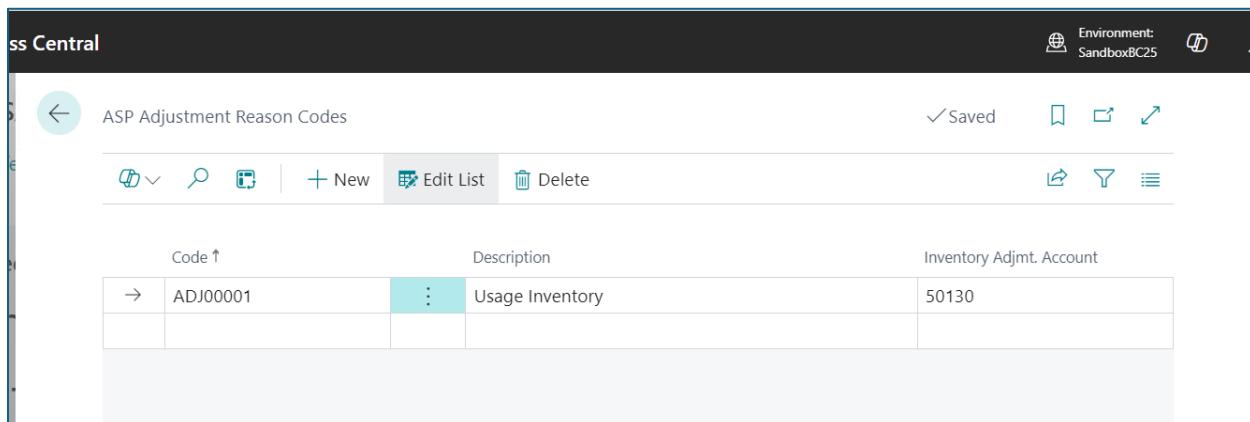


Code ↑	Description		Inventory Adjmt. Account
→ ADJ00001	⋮	Usage Inventory	50130



Posting Date	Entry Type	Document No.	Item No.	Description	ASM Equipment No.	Location Code	ASP Adjustment Reason Code	Bin Code	Quantity	Unit Amount	Amount	Unit Cost	Unit of Measure Code			
→ 11/20/2024	Positive Ad...	DEFAULT	SP-BOM1107	Circuit board		EAST	ADJ00001		0	6.23	0.00	6.23	PCS			
<table border="1"><thead><tr><th>Code ↑</th><th>Description</th></tr></thead><tbody><tr><td>→ ADJ00001</td><td>Usage Inventory</td></tr></tbody></table>													Code ↑	Description	→ ADJ00001	Usage Inventory
Code ↑	Description															
→ ADJ00001	Usage Inventory															
<p>+ New      Show details      Select from full list</p>																

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



Code ↑	Description		Inventory Adjmt. Account
→ ADJ00001	⋮	Usage Inventory	50130

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

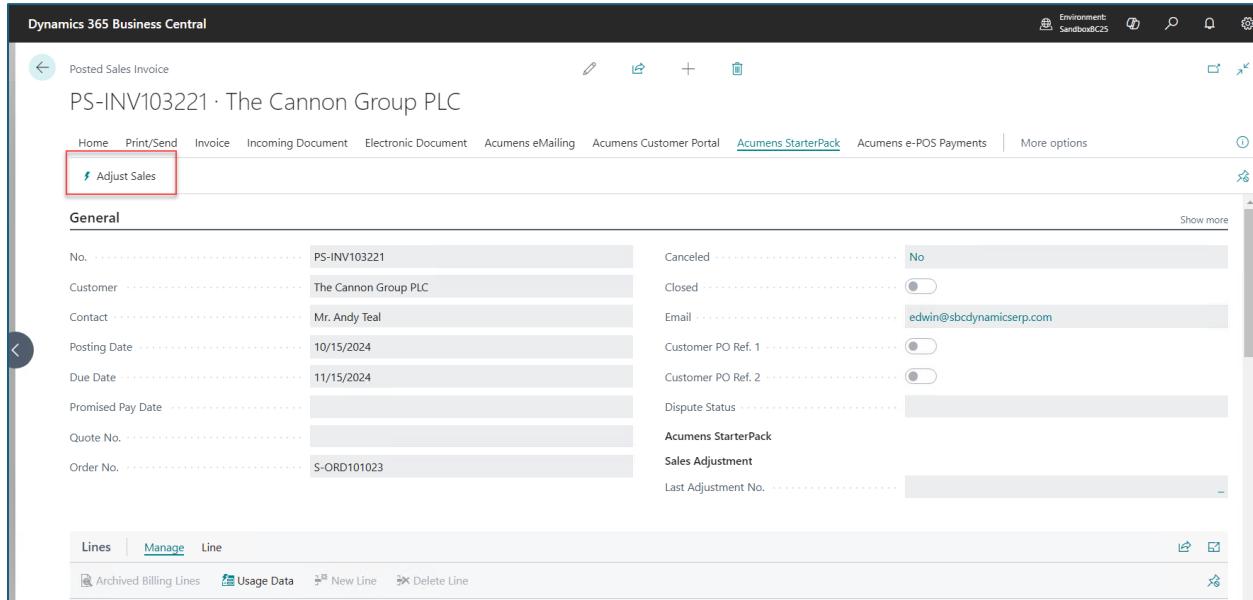
Type	No.	Item Reference No.	Description	Return Reason Code	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Ch... Use Tax	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Return
→ Comment	...		Invoice No. PS-INV103223:		EAST	4	PCS	100.00	SALESTAX	<input type="checkbox"/>	*			400.00
Item	SP-BOM1108		Power cord		EAST	4	4	27.89	SALES	<input type="checkbox"/>	NONTAXABLE			

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

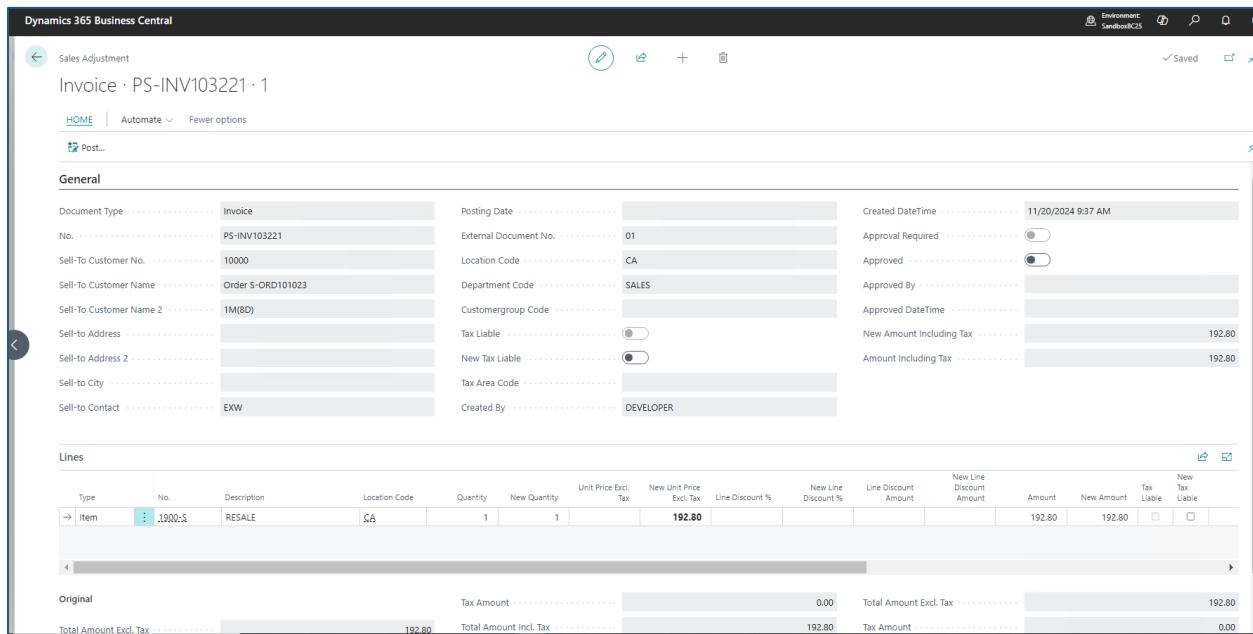
Posting Date	Entry Type	Document Type	Document No.	Item No.	Location Code	Quantity	Invoiced Quantity	Cost Amount (Actual)	Department Code	ASM Equipment No.	Description
11/20/2024	Negative Adjmt.		S-RCPT107001	SP-BOM1108	EAST	-4	-4	-27.89	SALES		
11/20/2024	Sale	Sales Return Receipt	S-RCPT107001	SP-BOM1108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

## 1.16. Sales Adjustment.

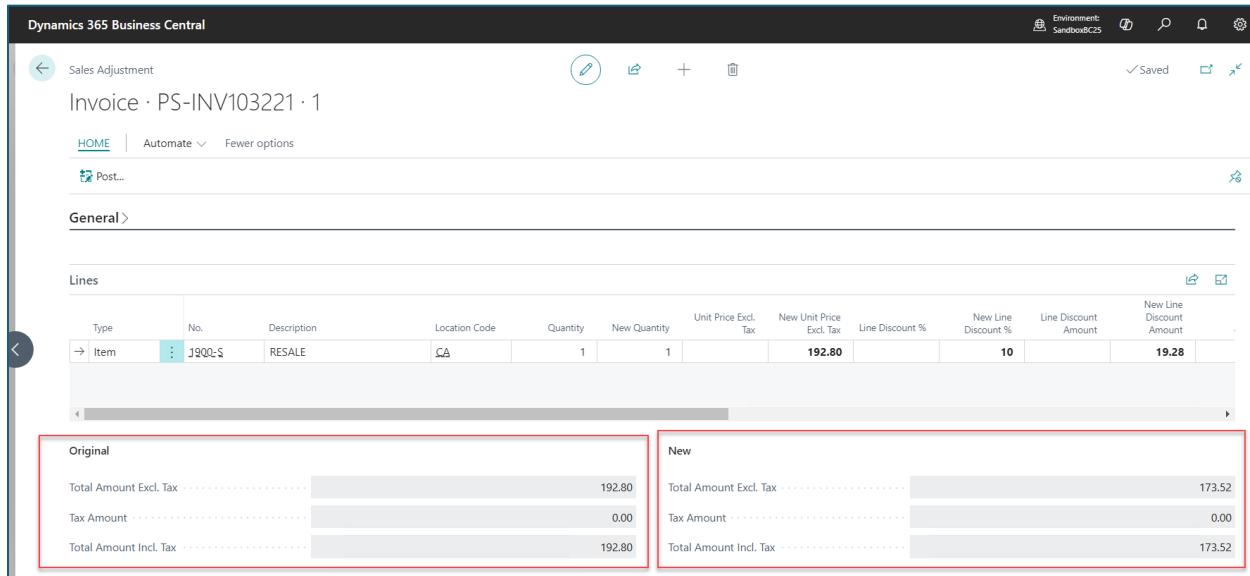
This feature introduces an option to adjust specific fields on posted sales documents. This is an extension of the Standard Business Central Edit Document function with an update on the ledgers.



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 permissions and can only be adjusted by permitted users.



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



Sales Adjustment

Invoice · PS-INV103221 · 1

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	J900-S	RESALE	CA	1	1	192.80	192.80	10	10	19.28	19.28

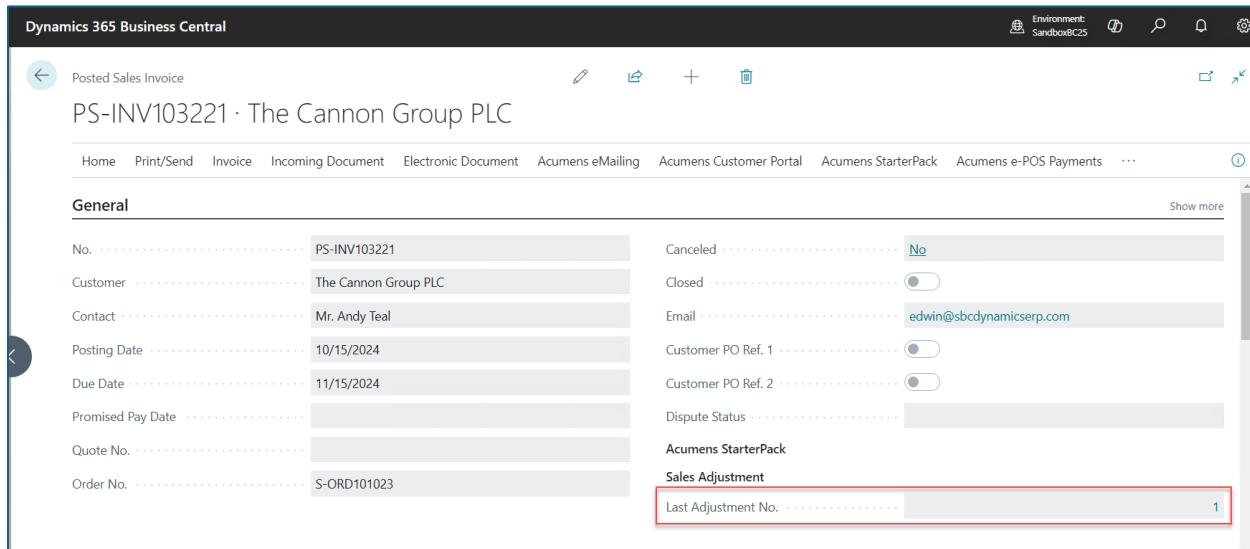
Original

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.



Posted Sales Invoice

PS-INV103221 · The Cannon Group PLC

General

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

Dynamics 365 Business Central

Posted Sales Adjustment - Invoice - PS-INV103221 · 1

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

**Lines**

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.

**Close**

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

Dynamics 365 Business Central

14130 Finished Goods

General Ledger Entries

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 Accr
4379	10/15/2024	PS-INV103221	50110		Direct Cost 10000 on 10/15/24	SALES					150.30	G/L Accr
4380	10/15/2024	Invoice	PS-INV103221	40140	Order S-ORD101023	SALES	Sale	DOMESTIC	RETAIL		-192.80	G/L Accr
4381	10/15/2024	Invoice	PS-INV103221	15110	Order S-ORD101023	SALES					192.80	G/L Accr
4406	10/15/2024	Credit Memo	PS-INV103221	40910	Adj:Order S-ORD101023		Sale	DOMESTIC	RETAIL		-19.28	G/L Accr
4407	10/15/2024	Credit Memo	PS-INV103221	40140	Adj:Order S-ORD101023		Sale	DOMESTIC	RETAIL		38.56	G/L Accr
4408	10/15/2024	Credit Memo	PS-INV103221	15110	Adj:Order S-ORD101023	SALES					-19.28	G/L Accr

Dynamics 365 Business Central

Customer Ledger Entries

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

Dynamics 365 Business Central

Environment: SandboxBC25

Detailed Customer Ledger Entries

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

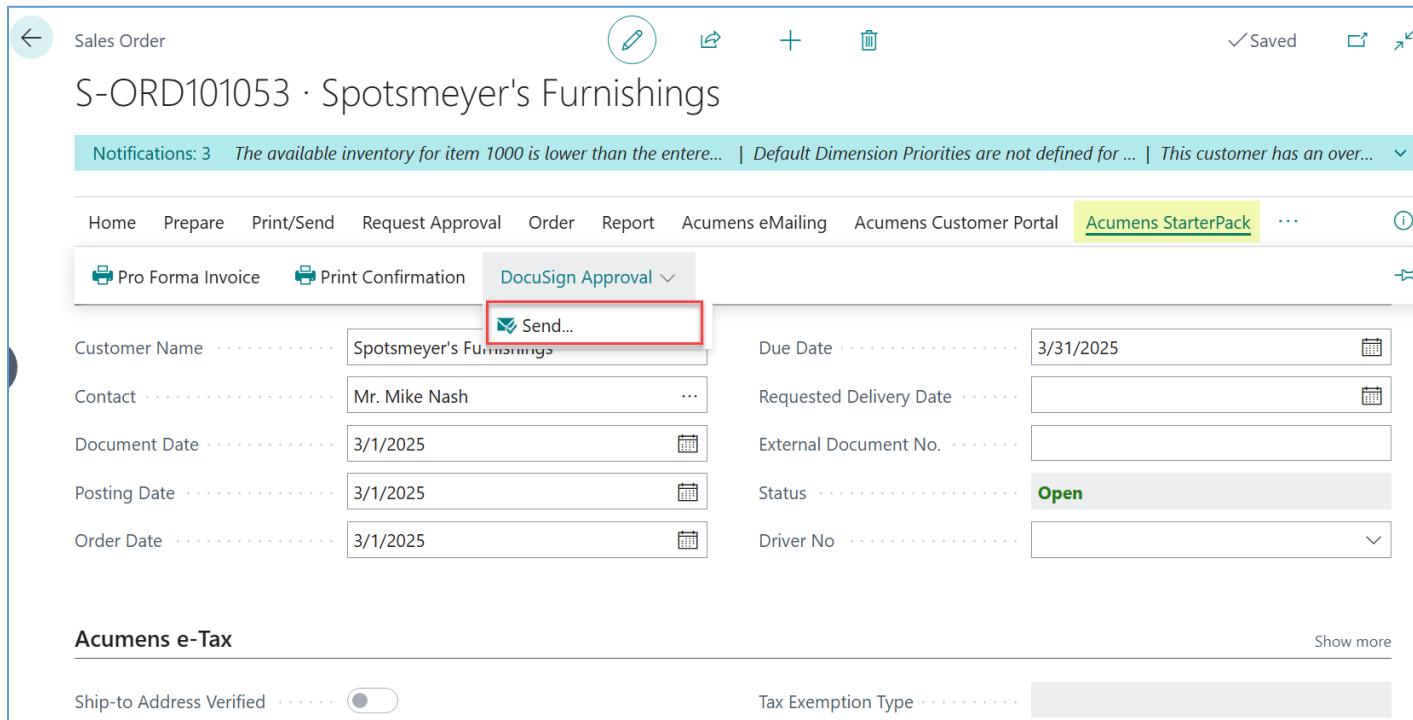
Posting Date ↑	Entry Type	Document Type ↑	Document No. ↑	Customer No.	Currency Code	Amount	Amount (\$)	Initial Entry Due Date	Entry No.
10/15/2024	Initial Entry	Invoice	PS-INV103221	10000		192.80	192.80	11/15/2024	876
10/15/2024	Initial Entry	Credit Memo	PS-INV103221	10000		-19.28	-19.28	10/15/2024	881

## 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 screenshot shows the Acumens software interface for a Sales Order. The top navigation bar includes 'Sales Order', a pencil icon, a plus sign, a trash bin, and a 'Saved' status. Below the title 'S-ORD101053 · Spotsmeyer's Furnishings' is a notifications bar with three items. The main menu bar has options like 'Home', 'Prepare', 'Print/Send', 'Request Approval', 'Order', 'Report', 'Acumens eMailing', 'Acumens Customer Portal', 'Acumens StarterPack', and a help icon. A dropdown menu for 'DocuSign Approval' is open, with the 'Send...' option highlighted by a red box. The main content area shows fields for 'Customer Name' (Spotsmeyer's Furnishings), 'Contact' (Mr. Mike Nash), 'Document Date' (3/1/2025), 'Posting Date' (3/1/2025), 'Order Date' (3/1/2025), 'Due Date' (3/31/2025), 'Requested Delivery Date' (empty), 'External Document No.' (empty), 'Status' (Open), and 'Driver No.' (empty). At the bottom, there's an 'Acumens e-Tax' section with a toggle for 'Ship-to Address Verified' and a dropdown for 'Tax Exemption Type'.

The customer will receive the email shown below.

\*\*\*Test Document\*\*\*Please sign this document

 DocuSign Demo System <dse\_demo@docsign.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.

Download pictures

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

REVIEW DOCUMENT

**Business Central Developer**  
[developer@sbcdynamicserp.com](mailto:developer@sbcdynamicserp.com)

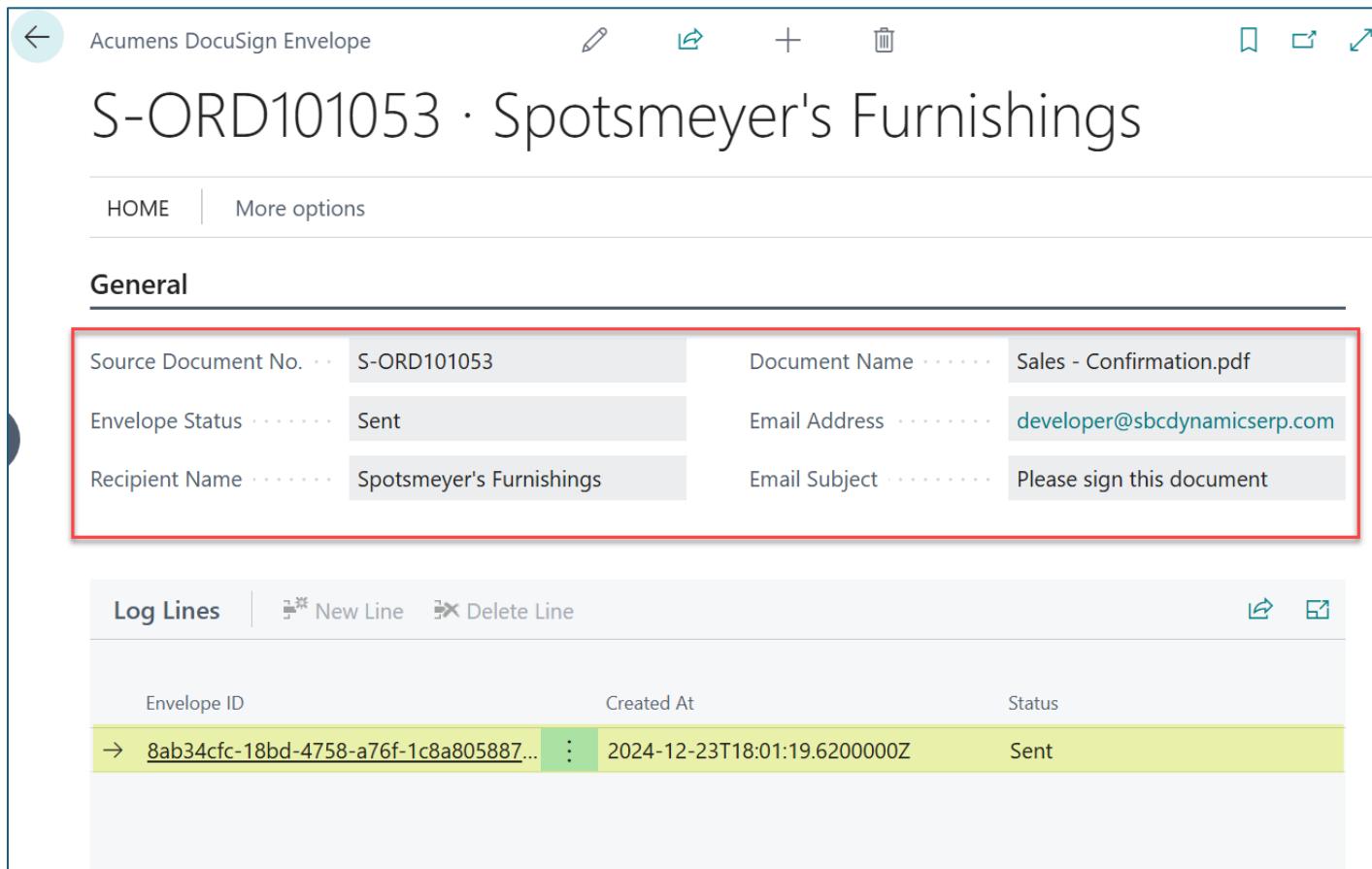
Spotsmeyer's Furnishings,

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.



The screenshot shows the Acumens DocuSign Envelope Details page. At the top, there is a header with a back arrow, the title 'Acumens DocuSign Envelope', and various navigation icons. The main title of the envelope is 'S-ORD101053 · Spotsmeyer's Furnishings'. Below the title, there are two tabs: 'HOME' and 'More options'. The 'General' section is currently selected, displaying the following data in a table:

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

Below the General section is a 'Log Lines' section with a table:

Envelope ID	Created At	Status
→ 8ab34cfc-18bd-4758-a76f-1c8a805887...	2024-12-23T18:01:19.620000Z	Sent

## 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

Finish

**FIELDS**

- Signature
- DS Initial
- Stamp
- Date Signed
- Name
- First Name
- Last Name
- Email Address
- Company
- Title
- Text
- Checkbox

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

DEMONSTRATION DOCUMENT ONLY  
PROVIDED BY DOCSIGN 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 USA, Inc.  
7122 South Ashford Street  
Westminster  
Atlanta, GA 31172  
USA

External Document No. Sales person Quote No. Shipment Method

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  
D8A0091C-4C42-47

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

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

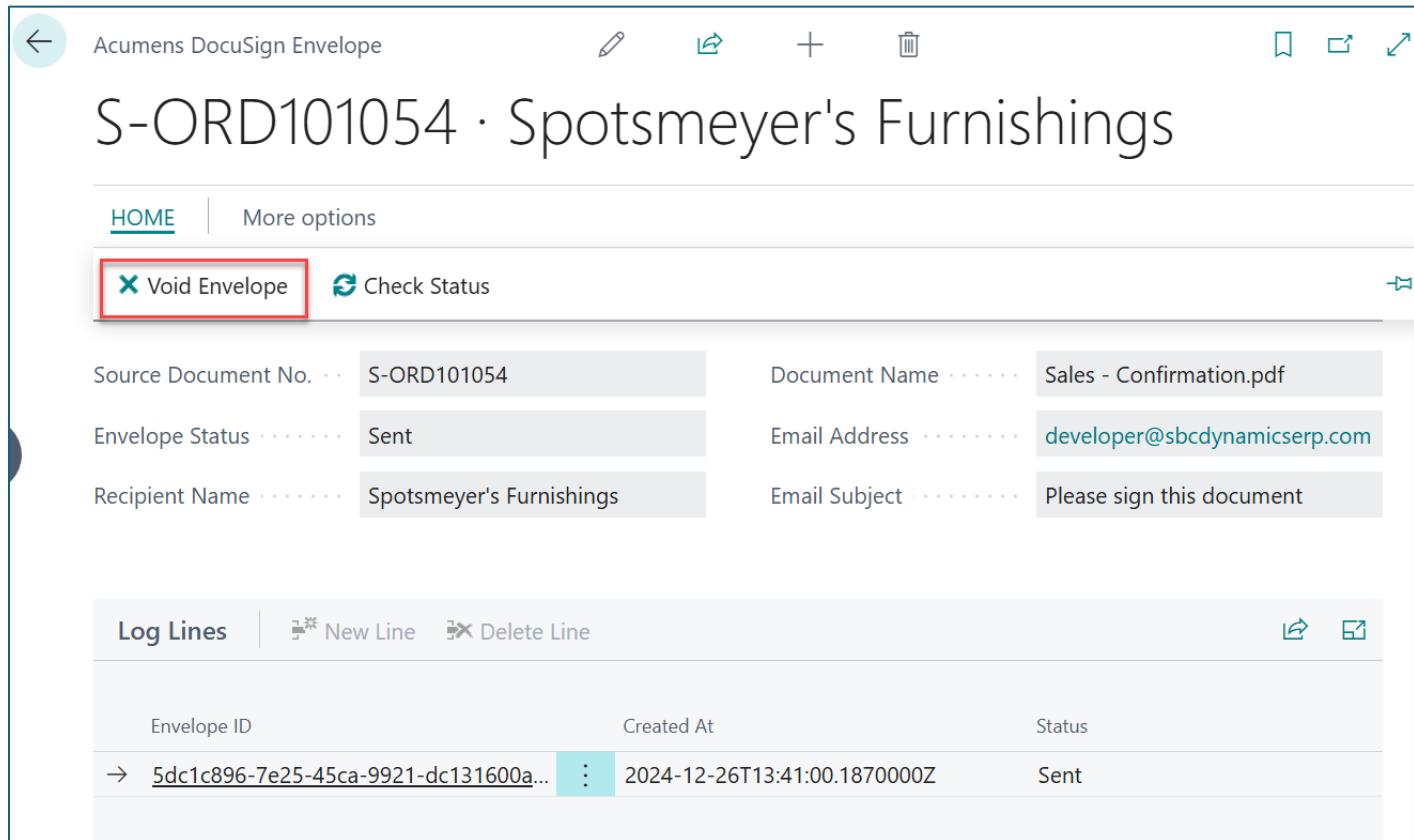
No.	Description	Quantity	Unit Price Excl. Tax	Tax %	Line Amount Excl. Tax
1000	J&R Office Drawers	1 Piece	30.00	10.25	30.00
				Subtotal	30.00
				Invoice Discount	0.00
				Total Tax	3.08
				<b>Total USD Incl. Tax</b>	<b>33.08</b>

Signed by:

Spotsmeyer's Furnishings  
E69A5281CAB8C427...

## 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

[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

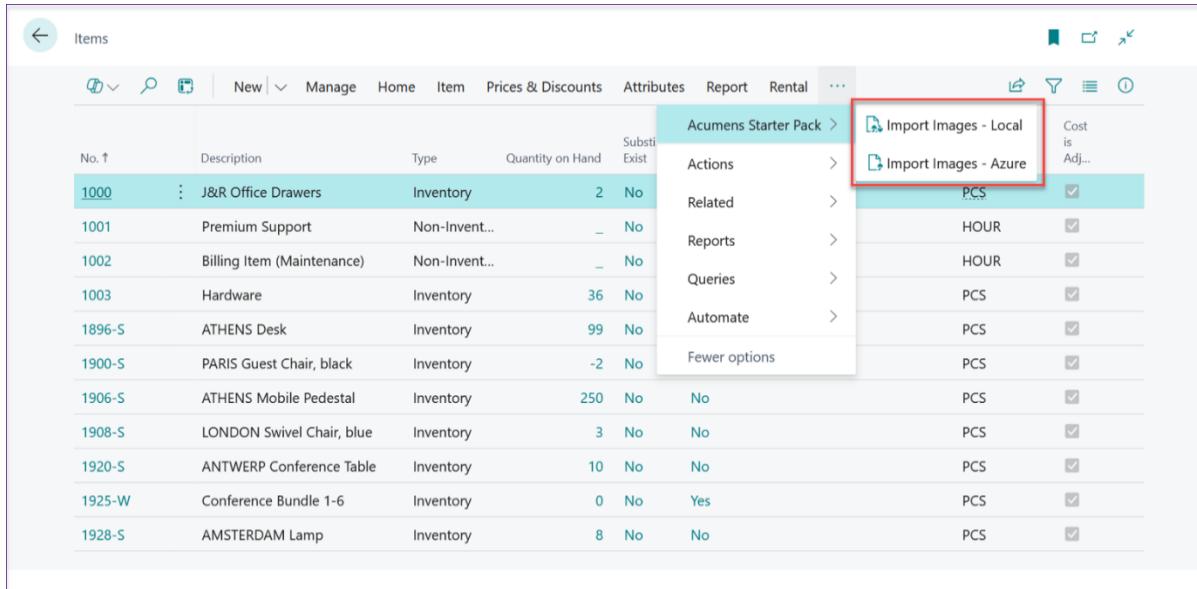
**Log Lines** [New Line](#) [Delete Line](#)

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.



**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.