

Acumens Cash Flow Solutions



**Acumens Cash Flow
Solutions**

Prepared & developed by
SBC Dynamics ERP

Document History

Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
1.0	04-26-2024		Document Prepared
2.0	09-11-2024		Document Revised

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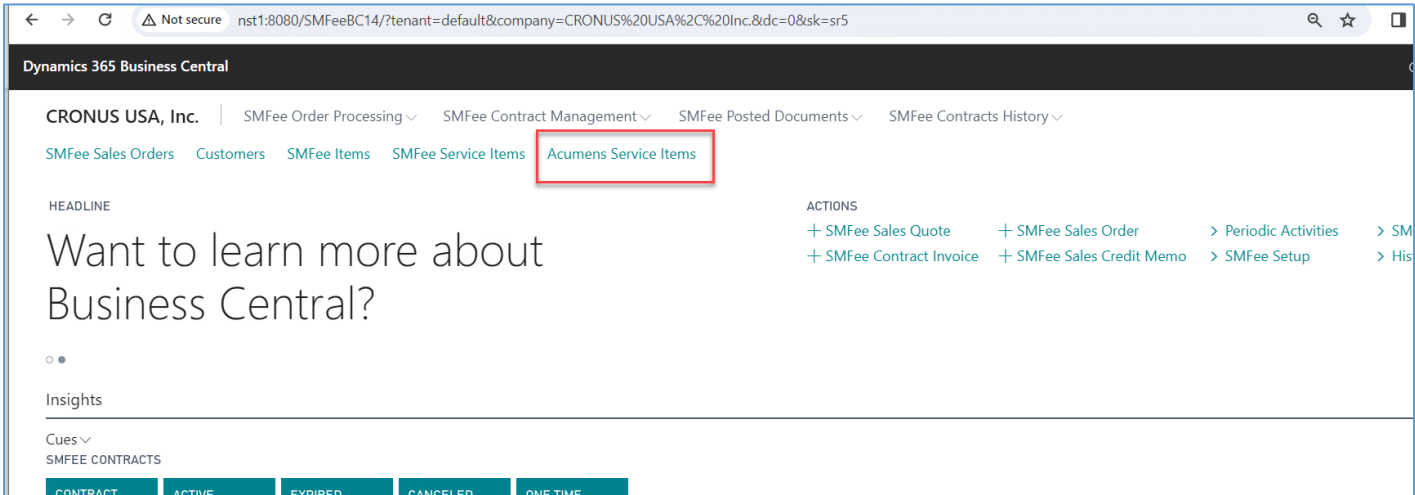
ACUMENS CASH FLOW APP

Acumens Cash Flow Solutions serves as the base app that manages common data between SBC add-ons. It implements below features.

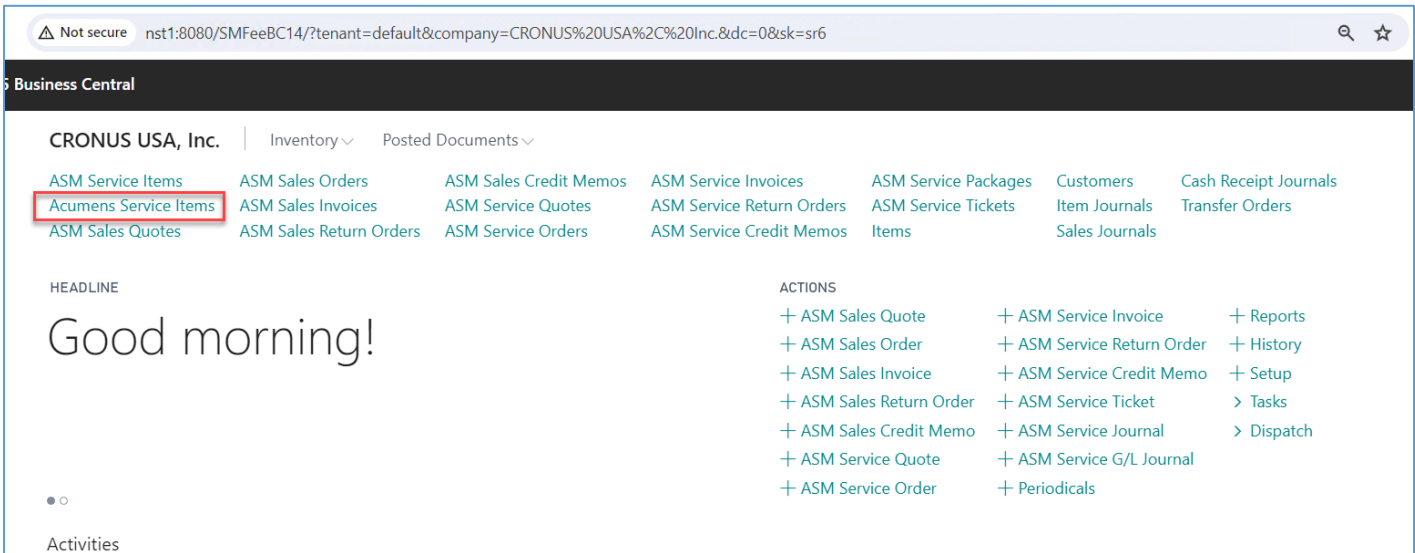
- 1. **Acumens Service Items.**
It is a read-only list and will show Service items created for both Acumens SMFee Billing app and Acumens Service Job Management app.

It is accessible from the role centers below.

Acumens SMFee Billing profile.



ASM Service Job Management profile.



This opens the Acumens Service Items list. Acumens Service Item page is read only, and you cannot create, modify, or delete the Service item from here.

Not secure

nst1:8080/SMFeeBC14/?tenant=default&company=CRONUS%20USA%2C%20Inc.&sk=sr6&bookmark=15%3bLUYBAAJ7AJAAMQ%3d%3d&node=0001458f-f545-000...

Finish update

Dynamics 365 Business Central

CRONUS USA, Inc.

Inventory

Posted Documents

ASM Service Items

Acumens Service Items

ASM Sales Quotes

ASM Sales Orders

ASM Sales Invoices

ASM Sales Return Orders

ASM Sales Credit Memos

ASM Service Quotes

ASM Service Orders

ASM Service Invoices

ASM Service Return Orders

ASM Service Credit Memos

ASM Service Packages

ASM Service Tickets

Items

Customers

Item Journals

Sales Journals

Cash Receipt Journals

Transfer Orders

Acumens Service Items:

All

Search

HOME

Show Attached

Open in Excel

NO.	ACUMENS APP	DESCRIPTION	ITEM NO.	ITEM DESCRIPTION	SERIAL NO.	CUSTOMER NO.	SHIP-TO CODE	SHIP-TO CODE	UNIT OF MEASURE CODE	SALES UNIT COST	SALES UNIT PRICE
ASM-SIN00...	ASM Service Job	Frequency filter for LS-100	FF-100	Frequency filter for LS-100		10000	192 Market Square		PCS	15.00	21.00
ASM-SIN00...	ASM Service Job	HP LaserJet Pro M283fdw Wirel...	ASMSI002	HP LaserJet Pro M283fdw Wireles...		01121212	612 South Sunset Drive		PCS		
ASM-SIN00...	ASM Service Job	Ford Ranger XL	ASMSI001	Ford Ranger XL			...		PCS		
ASM-SIN00...	ASM Service Job	Ultra 160/M SCSI Controller	80204	Ultra 160/M SCSI Controller		10000	192 Market Square		PCS	5.40	10.40
SM-0004	SMFee Contract	Dynamics 365 Subscription Lice...	D365-200	Dynamics 365 Subscription License		10000	192 Market Square		EACH		120.00
SM-0003	SMFee Contract	3rd Party SW License Tables	D365T	3rd Party SW License Tables		10000	192 Market Square		EACH		
SM-0002	SMFee Contract	Dynamics 365 Annual Maintena...	D365-300	Dynamics 365 Annual Maintenance		10000	192 Market Square		EACH		
SM-0001	SMFee Contract	GRAPHIC PROGRAM	80201	GRAPHIC PROGRAM		01445544	3000 Roosevelt Blvd.		PCS	200.00	220.00
76	SMFee Contract	Acumens eMailing for STAR Eve...	D365-400	Acumens eMailing for STAR Event...		01445544	3000 Roosevelt Blvd.		EACH		100.00
75	SMFee Contract	Dynamics 365 Subscription Lice...	D365-200	Dynamics 365 Subscription License			...		EACH		102.08
74	SMFee Contract	Dynamics 365 Annual Maintena...	D365-300	Dynamics 365 Annual Maintenance			...		EACH		2,000.00
72	SMFee Contract	Dynamics 365 Perpetual License	D365-100	Dynamics 365 Perpetual License			...		EACH		12,500.00
71	SMFee Contract	3rd Party SW License Tables	D365T	3rd Party SW License Tables			...		EACH		1,000.00
70	SMFee Contract	3rd Party SW License Tables	D365T	3rd Party SW License Tables			...		EACH		1,000.00

Page | 5

Open the card to view details.

Not secure

nst1:8080/SMFeeBC14/?tenant=default&company=CRONUS%20USA%2C%20Inc.&sk=sr6&bookmark=35%3bLUYBAAJ7%2f0EAUwBNAC0AUwBJAE4AMAAwADAAMA...

Business Central

ACUMENS SERVICE ITEM CARD

ASM-SIN00003 · HP LaserJet Pro M283fdw Wireless Laser All-In-One Color Printer

Navigate

Item

Show Attached

More options

SMFee Contracts

Dimensions

SMFee Item Log

SMFee Ledger Entries

Planned Maintenance

Service Tickets

Service Line Item Label

General

No.

ASM-SIN00003

Variant Code

Description

HP LaserJet Pro M283fdw Wireless Laser All-In-One Color Printer

Serial No.

...

Item No.

ASMSI002

Status

Installed

Item Description

HP LaserJet Pro M283fdw Wireless Laser All-In-One Color Printer

Search Description

HP LASERJET PRO M283FDW WIRELESS LASER ALL-IN-ONE COL...

Customer No.

01121212

Priority

Low

Acumens App

ASM Service Job

Acumens SMFee Billing

SMFee Item Group Code

Sales Order No.

SMFee Item Components

No

Order Date

Location of Service Item

Uninstalled Date

Info Unit

Informational Item

Info Unit Qty

0.00

Comment Text

Sales Invoice No.

Sales Order Line No.

0

Sales Order Quantity

0.00

Acumens eServices

Service Item Group Code

SER-IG

First Service Date

4/1/2024

Service Price Group Code

Service Period

2M

Response Time (Hours)

1

Last Service Date

Preferred Resource

MARY

WARRANTY

Sales Date

Warranty Starting Date (Labor)

4/1/2024

Installation Date

Warranty Ending Date (Labor)

5/1/2024

Service Item Group Code

SER-IG

Warranty Starting Date (Parts)

4/1/2024

On Scheduled Maintenance

Warranty Ending Date (Parts)

5/1/2024

Service Package

001

Warranty % (Parts)

100

Warranty % (Labor)

100

Customer

SELL-T0

Customer Name

Spotsmeyer's Furnishings

Customer Phone No.

Address

612 South Sunset Drive

Address 2

City

Miami

State

FL

ZIP Code

37125

Country/Region Code

US

Contact

Mr. Mike Nash

Shipping >

37125

Mr. Mike Nash

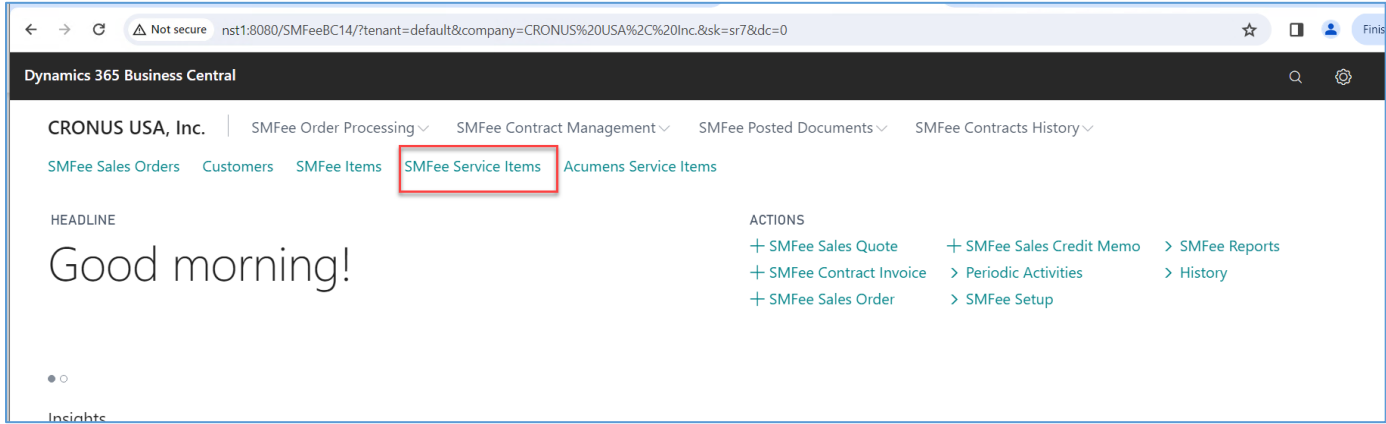
Vendor >

Detail >

Page | 6

Service items are created from the respective app from below page:

- 1.1. SMFee Service Items page.
- Creates SMFee Service Items. It is accessible from Acumens SMFee App profile.



On click, it opens SMFee Service Item List page.

A screenshot of the Dynamics 365 Business Central web interface showing the 'SMFee Service Items' list page. The page header is identical to the previous screenshot. The main content area displays a table with columns: NO., DESCRIPTION, ITEM NO., ITEM DESCRIPTION, SERIAL NO., CUSTOMER NO., CUSTOMER NAME, VENDOR NO., VENDOR NAME, and VARIAN CODE. The table contains 14 rows of data, including items like '3rd Party SW License Tables', 'Taxjar Customer', 'Dynamics 365 Subscription Lic...', 'Acumens eMailing for STAR Ev...', 'GRAPHIC PROGRAM', and 'Dynamics 365 Annual Mainten...'. The table is filtered by 'All' and has options for 'Search', '+ New', 'Delete', 'HOME', 'Show Attached', and 'Open in Excel'. The bottom of the page shows 'Page | 7'.

Click new to create a new SMFee Service item. Update all required fields.

Business Central

SMFEE SERVICE ITEM CARD

77 · 3rd Party SW License Tables

HOMEShow Attached

General

No.77

Description3rd Party SW License Tables

Item No.D365T

Item Description3rd Party SW License Tables

SMFee Item Group CodeC-ITEM

Customer No.01454545

Variant CodeTABLES

Serial No.1245676543

StatusInstalled

SMFee Item ComponentsNo

Search Description3RD PARTY SW LICENSE TABLES

PriorityLow

CustomerNew Concepts FurnitureMs. Tammy L. McDonald

Shipping31772Ms. Tammy L. McDonald

Vendor

Detail

Sales Unit Cost900.00

Sales Unit Price999.00

Info Unit

Info Unit Qty0.00

Sales Invoice No.

Comment Text

Sales Order Line No.0

Sales Order Quantity0.00

Description3rd Party SW License Tables

Unit of Measure CodeEACH

Numbering series is populated from Acumens SMFee Setup.

Not securenst1:8080/SMFeeBC14/?tenant=default&sk=878046e1-67bc-422e-b894-5ae17c67252a&bookmark=11%3bl08BAAJ7&page=85919&company=CRONUS%20USA%2C...

Business Central

Acumens SMFee Billing Setup

HOMEShow AttachedMore options

Defaults

Contracts

Terms and conditions

Numbering

Service Item Nos.SMFEE-ITEM

Contract Nos.SMFEE-CONTRACT

Contract Template Nos.SMFEE-TEMP

Quote Nos.SMFEEQUOTE-CON

Order Nos.SMFEE-ORDER-CON

Invoice Nos.SMFEE-INV-CON

Credit Memo Nos.SMFEE-CR-CON

Posted Shipment Nos.SMFEE-SHPT

Posted Invoice Nos.SMFEE-P.INV-CON

Posted Return Receipt Nos.SMFEE-RCPT

Posted Credit Memo Nos.SMFEE-P.CR-CON

Prepaid Posting Document Nos.SMFEE-PREPAID

Calculation Nos.SMFEECALC

Master Contract Nos.SMFEE-MASTER-CONT

Once created, the SMFee Service item is also available on the Acumens Service Item list with “Acumens App” field updated as SMFee Contract.

← → ↻ ⚠ Not secure nst1:8080/SMFeeBC14/?tenant=default&sk=878046e1-67bc-422e-b894-5ae17c67252a&bookmark=15%3bLUIYBAAJ7AjAAMQ%3d%3d&mnode=00014cd0-aadb-0000-... 🔍 ⭐ 📱 👤 Finish update

Dynamics 365 Business Central 🔍 ⚙️ ?

CRONUS USA, Inc. | SMFee Order Processing ▾ SMFee Contract Management ▾ SMFee Posted Documents ▾ SMFee Contracts History ▾

SMFee Sales Orders Customers SMFee Items SMFee Service Items Acumens Service Items 🔗

Acumens Service Items: All ▾ 🔍 Search HOME ▾ Show Attached ▾ 📄 Open in Excel 🔼 ☰ ⌚ ↗

NO. 4	ACUMENS APP	DESCRIPTION	ITEM NO.	ITEM DESCRIPTION	SERIAL NO.	CUSTOMER NO.	SHIP-TO CODE	SHIP-TO CODE	UNIT OF MEASURE CODE	SALES UNIT COST	SALES UNIT PRICE
77	⋮ SMFee Contract	3rd Party SW License Tables	D365T	3rd Party SW License Tables	1245676...	01454545	705 West Peachtree Street		EACH	900.00	999.00
76	SMFee Contract	Acumens eMailing for STAR Eve...	D365-400	Acumens eMailing for STAR Event...		01445544	3000 Roosevelt Blvd.		EACH		100.00
75	⋮ SMFee Contract	Dynamics 365 Subscription Lice...	D365-200	Dynamics 365 Subscription License			—		EACH		102.08
74	SMFee Contract	Dynamics 365 Annual Maintena...	D365-300	Dynamics 365 Annual Maintenance			—		EACH		2,000.00
72	SMFee Contract	Dynamics 365 Perpetual License	D365-100	Dynamics 365 Perpetual License			—		EACH		12,500.00
71	SMFee Contract	3rd Party SW License Tables	D365T	3rd Party SW License Tables			—		EACH		1,000.00
70	SMFee Contract	3rd Party SW License Tables	D365T	3rd Party SW License Tables			—		EACH		1,000.00
68	SMFee Contract	Dynamics 365 Subscription Lice...	D365-200	Dynamics 365 Subscription License			—		EACH		300.00



77 · 3rd Party SW License Tables

[Navigate](#) | [Item](#) | [Show Attached](#) | [More options](#)

[SMFee Contracts](#) | [Dimensions](#) | [SMFee Item Log](#) | [SMFee Ledger Entries](#) | [Planned Maintenance](#) | [Service Tickets](#) | [Service Line Item Label](#)

General

No.	77	Variant Code	TABLES
Description	3rd Party SW License Tables	Serial No.	1245676543 ...
Item No.	D365T	Status	Installed
Item Description	3rd Party SW License Tables	Search Description	3RD PARTY SW LICENSE TABLES
Customer No.	01454545	Priority	Low
Acumens App	SMFee Contract		

Acumens SMFee Billing

SMFee Item Group Code	C-ITEM	Sales Order No.	
SMFee Item Components	No	Order Date	
Location of Service Item		Uninstalled Date	
Info Unit		Informational Item	<input type="checkbox"/>
Info Unit Qty		Comment Text	
Sales Invoice No.		Sales Order Line No.	0
		Sales Order Quantity	0.00

Acumens eServices >

Customer >

New Concepts Furniture | Ms. Tammy L. McDonald

Shipping >

31772 | Ms. Tammy L. McDonald

Vendor >

Detail

Sales Unit Cost	900.00	Description 2	- Tables
Sales Unit Price	999.00	Customer No.	01454545
Contact	Ms. Tammy L. McDonald	Installation Date	4/26/2024
Description	3rd Party SW License Tables	Serial No.	1245676543
Unit of Measure Code	EACH		

1.2. ASM Service Items page.

Creates ASM Service Items. It is accessible from the ASM Service Job Management App profile.

CRONUS USA, Inc.

Inventory ▾Posted Documents ▾

ASM Service Items

Acumens Service Items

ASM Sales Quotes

ASM Sales Orders

ASM Sales Invoices

ASM Sales Return Orders

ASM Sales Credit Memos

ASM Service Quotes

ASM Service Orders

ASM Service Invoices

ASM Service Return Orders

ASM Service Credit Memos

ASM Service Packages

ASM Service Tickets

Items

Customers

Item Journals

Sales Journals

Cash Receipt Joi

Transfer Orders

HEADLINE

Good morning!

ACTIONS

+ ASM Sales Quote

+ ASM Sales Order

+ ASM Sales Invoice

+ ASM Sales Return Order

+ ASM Sales Credit Memo

+ ASM Service Quote

+ ASM Service Order

+ ASM Service Invoice

+ ASM Service Return Order

+ ASM Service Credit Memo

+ ASM Service Ticket

+ ASM Service Journal

+ ASM Service G/L Journal

+ Periodicals

+ Reports

+ History

+ Setup

+ Tasks

+ Dispatch

Activities

This opens the ASM Service Item List page.

CRONUS USA, Inc.

Inventory ▾Posted Documents ▾

ASM Service Items

Acumens Service Items

ASM Sales Quotes

ASM Sales Orders

ASM Sales Invoices

ASM Sales Return Orders

ASM Sales Credit Memos

ASM Service Quotes

ASM Service Orders

ASM Service Invoices

ASM Service Return Orders

ASM Service Credit Memos

ASM Service Packages

ASM Service Tickets

Items

Customers

Item Journals

Sales Journals

Cash Receipt Joi

Transfer Orders

ASM Service Items:

All ▾

Search

+ New

Delete

Process ▾

Acumens eServices ▾

Show Attached ▾

Open in Excel

...

Filter

Menu

Info

Link

NO. ↑	DESCRIPTION	ITEM NO.	ITEM DESCRIPTION	SERIAL NO.	CUSTOMER NO.	SHIP-TO CODE
ASM-SIN00001	Ultra 160/M SCSI Controller	80204	Ultra 160/M SCSI Controller		10000	
ASM-SIN00002	Ford Ranger XL	ASMSI001	Ford Ranger XL			
ASM-SIN00003	HP LaserJet Pro M283fdw Wireless Laser All...	ASMSI002	HP LaserJet Pro M283fdw Wireless Laser All-I...		01121212	
ASM-SIN00004	Frequency filter for LS-100	FF-100	Frequency filter for LS-100		10000	

Click new to create a new ASM Service item. Update fields and close page.

Not securenst1:8080/SMFeeBC14/?tenant=default&sk=e5f27449-adf4-486d-b5ec-5da3bdb70b82&bookmark=35%3bLUYBAJ7%2f0EAUwBNAC0AUwBJAE4AMAAwADAAMAA1...

business Central

ASM SERVICE ITEM

+

✓ SAVED

ASM-SIN00005 · Server - Enterprise Package

Navigate

Item

HOME

Show Attached

More options

General

No.ASM-SIN00005...

DescriptionServer - Enterprise Package

Item No.8924-W

Item DescriptionServer - Enterprise Package

Service Item Group CodeCOMPUTERS

Service Price Group CodeSERVER

Variant CodeHP

Serial No.09876543456

StatusInstalled

Search DescriptionSERVER - ENTERPRISE PACKAGE

Response Time (Hours)1

PriorityLow

Preferred ResourceLINDA

Customer >

01121212Spotsmeyer's FurnishingsMr. Mike Nash

Shipping >

Vendor

Vendor No.10000

Vendor NameLondon Postmaster

Vendor Item No.SIN00005

Vendor Item NameHP Server Package Gen. 10

Detail

Sales Unit Cost487.00

Sales Unit Price533.60

Sales Date4/26/2024

Unit of Measure CodePCS

Installation Date4/26/2024

Acumens eServices

Service Item Group CodeCOMPUTERS

On Scheduled Maintenance

Service Package001

First Service Date7/1/2024

Service Period3M

Last Service Date

WARRANTY

Warranty Starting Date (Labor)4/1/2024

Warranty Ending Date (Labor)5/1/2024

Warranty Starting Date (Parts)4/1/2024

Warranty Ending Date (Parts)5/1/2024

Warranty % (Parts)40

Warranty % (Labor)30

Numbering series is populated from Acumens Service Jobs setup.

Not securenst1:8080/SMFeeBC14/?tenant=default&sk=e5f27449-adf4-486d-b5ec-5da3bdb70b82&bookmark=11%3bZEUBAAJ7&page=83302&company=CRONUS%20USA%2C...

Business Central

←

+

✓ SAVED

Acumens Service Jobs Setup

HOMEShow Attached

Payment Remittance Information >

Billing Texts >

Number Series

ASM Service Item Nos.	ASM-SIN	ASM Service Return Order Nos.	ASM-SRO
ASM Sales Quote Nos.	ASM-Q	ASM Service Credit Memo Nos.	ASM-SCM
ASM Sales Order Nos.	ASM-O	ASM Service Ticket Nos.	ASM-ST
ASM Sales Invoice Nos.	ASM-I	ASM Pickup Ticket Nos.	ASM-PT
ASM Sales Return Order Nos.	ASM-RO	ASM Delivery Ticket Nos.	ASM-DT
ASM Sales Credit Memo Nos.	ASM-CM	ASM Service Package Nos.	ASM-SP
Posted ASM Sales Shipment Nos.	ASM-PS+	ASM Service Estimate Nos.	ASM-SE
Posted ASM Sales Invoice Nos.	ASM-PSI+	Posted ASM Service Shipment Nos.	ASM-PSS+
Posted ASM Sales Return Receipt Nos.	ASM-PRR+	Posted ASM Service Invoice Nos.	ASM-PSSI+
Posted ASM Sales Credit Memo Nos.	ASM-PCM+	Posted ASM Service Credit Memo Nos.	ASM-PSCM+
ASM Service Quote Nos.	ASM-SQ	Posted ASM Service Return Receipt Nos.	ASM-PSRR+
ASM Service Order Nos.	ASM-SO	ASM Serviceable Item Nos.	ASM-SBI
ASM Service Invoice Nos.	ASM-SI		

Once set, the item is also available on the Acumens Service Item list with “Acumens App” field updated as ASM Service Job.

← → ↺ Not securenst1:8080/SMFeeBC14/?tenant=default&sk=e5f27449-adf4-486d-b5ec-5da3bdb70b82&bookmark=15%3bLUVBAAJ7AjAAMQ%3d%3d&node=0001458f-f545-0000-0...

Dynamics 365 Business Central

CRONUS USA, Inc. | Inventory ▾ Posted Documents ▾

ASM Service Items
Acumens Service Items
ASM Sales Quotes

ASM Sales Orders
ASM Sales Invoices
ASM Sales Return Orders

ASM Sales Credit Memos
ASM Service Quotes
ASM Service Orders

ASM Service Invoices
ASM Service Return Orders
ASM Service Credit Memos

ASM Service Packages
ASM Service Tickets
Items

Customers
Item Journals
Sales Journals

Cash Receipt Journals
Transfer Orders

Acumens Service Items: All ▾ Search HOME ▾ Show Attached ▾ Open in Excel

NO.	ACUMENS APP ▾	DESCRIPTION	ITEM NO.	ITEM DESCRIPTION	SERIAL NO.	CUSTOMER NO.	SHIP-TO CODE	SHIP-TO CODE	UNIT OF MEASURE CODE	SALES UNIT COST	SALES UNIT PRICE
ASM-SIN00005	ASM Service Job	Server - Enterprise Package	8924-W	Server - Enterprise Package	09876543...	01121212	612 South Sunset Drive		PCS	487.00	533.60
ASM-SIN00004	ASM Service Job	Frequency filter for LS-100	FF-100	Frequency filter for LS-100		10000	192 Market Square		PCS	15.00	21.00
ASM-SIN00003	ASM Service Job	HP LaserJet Pro M283fdw Wireless L...	ASMSI0002	HP LaserJet Pro M283fdw Wireless Las...		01121212	612 South Sunset Drive		PCS		
ASM-SIN00002	ASM Service Job	Ford Ranger XL	ASMSI0001	Ford Ranger XL					PCS		
ASM-SIN00001	ASM Service Job	Ultra 160/M SCSI Controller	80204	Ultra 160/M SCSI Controller		10000	192 Market Square		PCS	5.40	10.40
SM-0004	SMFee Contract	Dynamics 365 Subscription License	D365-200	Dynamics 365 Subscription License		10000	192 Market Square		EACH		120.00
SM-0003	SMFee Contract	3rd Party SW License Tables	D365T	3rd Party SW License Tables		10000	192 Market Square		EACH		
SM-0002	SMFee Contract	Dynamics 365 Annual Maintenance	D365-300	Dynamics 365 Annual Maintenance		10000	192 Market Square		EACH		
SM-0001	SMFee Contract	GRAPHIC PROGRAM	80201	GRAPHIC PROGRAM		01445544	3000 Roosevelt Blvd.		PCS	200.00	220.00

2. Acumens Combined Ledger.

This is a combined ledger with entries from both ASM Service job management app and Acumens SMFee Billing app.
It can be accessed below from both apps and is also accessible by search:

ASM Service Job Management app role center.

Not secure nst1:8080/SMFeeBC14/?tenant=default&sk=e5f27449-adf4-486d-b5ec-5da3bdb70b82&company=CRONUS%20USA%2C%20Inc.&dc=0

Business Central

CRONUS USA, Inc. | Inventory ▾ Posted Documents ▾

ASM Service Items
Acumens Service Items
ASM Sales Quotes

ASM Sales Orders
ASM Sales Invoices
ASM Sales Return Orders

ASM Sales Credit Memos
ASM Service Quotes
ASM Service Orders

ASM Service Invoices
ASM Service Return Orders
ASM Service Credit Memos

ASM Service Packages
ASM Service Tickets
Items

Customers
Item Journals
Sales Journals

Cash Receipt Journals
Transfer Orders

HEADLINE

Want to learn more about Business Central?

ACTIONS

+ ASM Sales Quote
+ ASM Sales Order
+ ASM Sales Invoice
+ ASM Sales Return Order
+ ASM Sales Credit Memo
+ ASM Service Quote
+ ASM Service Order

+ ASM Service Invoice
+ ASM Service Return Order
+ ASM Service
+ ASM Service
+ ASM Service
+ ASM Service
+ Periodicals

+ Reports
+ History

Navigate
Service Registers
Acumens Combined Ledger Entry

Acumens SMFee Billing app role center.

Not secure nst1:8080/SMFeeBC14/?tenant=default&sk=58a77215-ec11-4ed2-b632-cce5f528b404&company=CRONUS%20USA%2C%20Inc.&dc=0

Dynamics 365 Business Central

CRONUS USA, Inc. | SMFee Order Processing ▾ SMFee Contract Management ▾ SMFee Posted Documents ▾ SMFee Contracts History ▾

SMFee Sales Orders
Customers
SMFee Items
SMFee Service Items
Acumens Service Items

HEADLINE

Want to learn more about Business Central?

ACTIONS

+ SMFee Sales Quote
+ SMFee Contract Invoice
+ SMFee Sales Order

+ SMFee Sales Credit Memo
> Periodic Activities
> SMFee Set

> SMFee Reports
> History ▾

SMFee Register
Acumens Combined Ledger Entry
SMFee Customer Item Log
Navigate
Inactive Master Contracts
Canceled SMFee Contracts
Expired SMFee Contracts
Archived Contracts

Insights

Cues ▾
SMFEE CONTRACTS

CONTRACT QUOTES
0

ACTIVE CONTRACTS
11

EXPIRED CONTRACTS
1

CANCELED CONTRACTS
0

ONE TIME CONTRACTS
0

Page | 14

Combined Ledger entry is updated when either SMFee Service ledger or ASM job ledger is updated. Entries can be differentiated by the “Acumens App” column. This shows the source app the entry originated from.

“Source Ledger Entry No.” shows the original ledger entry no. of either SMFee Service ledger or ASM Service ledger.

For Acumens Service Job Management app ,Usage and Sales Entries are updated on the Combined ledger.

Not secure nst1:8080/SMFeeBC14/?bookmark=12%3bLkYBAACHAQ%3d%3d&page=83502&company=CRONUS%20USA%2C%20Inc.&dc=0

Business Central

ACUMENS COMBINED LEDGER ENTRY

Search Entry Show Attached Open in Excel More options

Navigate

ENTRY NO. ↑	ACUMENS APP	POSTING DATE	ENTRY TYPE	DOCUMENT NO.	TYPE	NO.	SOURCE LEDGER ENTRY NO.	QUANTITY	UNIT PRICE	UNIT COST	TOTAL COST	LINE AMOUNT	DISCOUNT
1	SMFee Contract	2/1/2024	Sale	PSCI0000006	Contract	SC00021	90	-1	-67.50	0.00	0.00	-67.50	
2	SMFee Contract	3/1/2024	Sale	PSCI0000006	Contract	SC00021	91	-1	-67.50	0.00	0.00	-67.50	
3	ASM Service Job	4/26/2024	Usage	ASM-SO00002	Item	FF-100	1	2	21.00	0.00	30.00	42.00	
4	ASM Service Job	4/26/2024	Usage	ASM-SO00002	Resource	CLEANING	2	2	83.00	0.00	99.00	166.00	
5	ASM Service Job	4/26/2024	Usage	ASM-SO00004	Resource	ELECTRICAL	3	2	166.00	0.00	167.20	232.40	
6	ASM Service Job	4/26/2024	Usage	ASM-SO00004	Item	FF-100	4	2	21.00	0.00	30.00	25.20	

You can navigate entries from here.

Not secure nst1:8080/SMFeeBC14/?bookmark=12%3bLkYBAACHAQ%3d%3d&page=83502&company=CRONUS%20USA%2C%20Inc.&dc=0

Business Central

ACUMENS COMBINED LEDGER ENTRY

Search Entry Show Attached Open in Excel More options

Navigate

ENTRY NO. ↑	ACUMENS APP	POSTING DATE	ENTRY TYPE	DOCUMENT NO.	TYPE	NO.	SOURCE LEDGER ENTRY NO.	QUANTITY	UNIT PRICE	UNIT COST	TOTAL COST
1	SMFee Contract	2/1/2024	Sale	PSCI0000006	Contract	SC00021	90	-1	-67.50	0.00	0.00
2	SMFee Contract	3/1/2024	Sale	PSCI0000006	Contract	SC00021	91	-1	-67.50	0.00	0.00
3	ASM Service Job	4/26/2024	Usage	ASM-SO00002	Item	FF-100	1	2	21.00	0.00	30.00
4	ASM Service Job	4/26/2024	Usage	ASM-SO00002	Resource	CLEANING	2	2	83.00	0.00	99.00
5	ASM Service Job	4/26/2024	Usage	ASM-SO00004	Resource	ELECTRICAL	3	2	166.00	0.00	167.20
6	ASM Service Job	4/26/2024	Usage	ASM-SO00004	Item	FF-100	4	2	21.00	0.00	30.00

Not secure nst1:8080/SMFeeBC14/?bookmark=12%3bCQEAAACHAQ%3d%3d&page=344&company=CRONUS%20USA%2C%20Inc.&dc=0

Business Central

← ACUMENS C ← NAVIGATE ✓ SAVED ↗

DOCUMENT

Document No. ASM-SO00004 Posting Date 04/26/24

Show Related Entries Find Print... More options

RELATED ENTRIES	NO. OF ENTRIES
Item Ledger Entry	1
Value Entry	1
Res. Ledger Entry	1
ASM Service Ledger Entry	2

For Acumens SMFee Billing app, Sales Entries are updated on the Combined ledger. You can navigate entries from here.

Business Central

← ACUMENS C ← NAVIGATE ✓ SAVED ↗

DOCUMENT

Document No. SCIO000018 Posting Date 04/01/24

Show Related Entries Find Print... More options

RELATED ENTRIES	NO. OF ENTRIES
Posted Sales Invoice	1
G/L Entry	3
Cust. Ledger Entry	1
Detailed Cust. Ledg. Entry	1
SMFee Contract Ledger Entry	12

3. User Filters.

Depending on the role of each user, you can set up filters that will apply to the cues on their Role center.

Dynamics 365 Business Central

Environment: Sandbox3

User Setup

✓ Saved

+ New Edit List Delete

User ID ↑	E-Mail	Acumens Managem... Role	Acumens SalesPerson Filter	Acumens Location Filter	Acumens Dimension 1 Filter	Acumens Dimension 2 Filter	Acumens Resp. Ctr. Filter	Co... Sup...	View Inv. Co...	Allow Ove... Co...	Shipping Dispatch Calendar Access	Shipping Dispatch Calendar Location
→ DEVELOPER	Developer@sbcdynamicserp.com	Admin						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No Access	

Admin

Sales Team Manager

Sales Person

Location

Dimension 1

Dimension 2

Responsibility Center

Service Manager

4. Document Locking.

Document locking allows limiting editing documents to one user at a time. This prevents the cases where users keep overwriting each other by updating the same document.

This is a setup driven feature that allows administrators to activate or deactivate document locking features.

ss Central

Environment: Sandbox3

Acumens Cash Flow Solutions Setup

General

Enable Document Loc... ☒

Disable Next Actions ☒

Allow User Multiple E... ☒

Example on the Sales Order page, with document locking enabled, the card is not editable, and the default edit button marked 1 below is disabled.

The user must manually click on edit marked 2 below to be able to edit the document. This essentially locks the document from modification by other users.

Sales Order | Work Date: 7/30/2024

101015 · Autohaus Mielberg KG

1

2

Process | Report | Release | Posting | Prepare | Order | Request Approval | Print/Send | Navigate | Acumens ePayments | Category 14 | Category 15 | Actions | Related | Reports | Less

Release

Reopen

Edit Order

General

Customer No.49633663

Customer NameAutohaus Mielberg KG

Sell-to

AddressPorschestraße 911

Address 2

CityHamburg 36

ZIP CodeDE-22417

Country/Region CodeDE

Contact No.CT000084

Phone No.

Mobile Phone No.

Emailrichard1@sbdynamicserp.com

Contact

No. of Archived Versions0

Document Date1/21/2024

Posting Date1/26/2024

Order Date1/21/2024

Due Date2/4/2024

Requested Delivery Date

Promised Delivery Date

External Document No.

Your Reference

Acumens ePayments

Apply Credit No.

Salesperson CodeOF

Campaign No.

Opportunity No.

Responsibility Center

Assigned User ID

StatusReleased

Customized e-Mail CardEC0001

Work Description

When a user is done modifying a record, exiting the card automatically unlocks the document allowing other users access the same record.

Administrators can unlock the documents in case a user has locked a document but is not actively editing it.

5. Preferred Payment options for Document Templates.

On the customer card, you can set up payment information to be displayed on sales documents printed or to that customer.

Dynamics 365 Business Central

Environment: Sandbox3

Customer Card

10000 · Adatum Corporation

Home

Request Approval

New Document

Prices and Discounts

Customer

Report

Synchronize

category10

Acumens eSalesTax & Address Verify

Acumens Flexible Commissions R2

Acumens Service Job

ASM Service Price Group ······ SERVICE

ASM Service e-Mail ······ Developer@sbcdynamicserp.com

Territory Code ······ CRESCENT

Preferred Payment options

Preferred Pay By ······ REMIT CHECK TO

Preferred Payment Method ······ Send Check

Alternate Pay By ······ WIRE VIA BANK ACCOUNT

Alternate Payment Method ······ US Bank

Acumens ePayments >

Acumens SMFee Billing

Customer Disc. Group ······

Customer Price Group ······

SMFee Tax Group Code Override ······

Preferred Payment options

Preferred Pay By ······ REMIT CHECK TO

Preferred Payment Method ······ Send Check

Alternate Pay By ······ WIRE VIA BANK ACCOUNT

Alternate Payment Method ······ US Bank