

Acumens Customer Portal Functionality Document

Prepared & developed by

SBC Dynamics ERP

Document History

Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
1.0	10-02-2024		Document Prepared

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Acumens Customer Portal

Acumens Customer Portal for Dynamics Business Central/ Dynamics NAV is an addon to enhance Customer Business interactions. With this extension, customers are able to track their sales (Unshipped/Unbilled Orders, Posted Sales Invoices and Unpaid posted Invoices), Save Card details, Save Bank details, make Card and Bank Payments through web portals integrated to Business Central in real time.

There are two web portals created for this integration which are acquired based on customer needs. It can be a reseller portal or a customer portal/salesperson portal.

This app works with Acumens e-Payments and Acumens e-POS to support Credit Card and Bank Payment processing.

The features included in this app are as follows:

1. Customer Defined Payment Method Setup
2. Customer Payment Processing
3. Reseller Portal
4. Customer Portal/Salesperson Portal

1. Customer Defined Payment Method Setup

With this feature, a customer is sent a link from business central to use to update their payment details.

1.1. Credit Card

To update credit card details, a user gets a URL from Business Central.


Customer Card on Business Central

The screenshot shows the 'Customer Card' for '10000 · Adatum Corporation' in Dynamics 365 Business Central. The 'Send Save Card Link' button is highlighted with a red box. The card displays various fields for customer information, including Name, IC Partner Code, Balance, and Credit Limit. The 'Send Save Card Link' button is located in the top left corner of the card.


Email notification with link to use to update card details


The screenshot shows an email notification titled 'Save Card Link' from 'Business Central Developer' to 'Betty Chebet Too'. The email contains a link to update credit card details: <http://localhost:8080/SavePaymentDetails/CreditCard/?CustomerNo/AAPB01/60750178-55E9-ED11-8850-6045BDE98BBA>. The email also includes a 'cronus' logo.

Save Card update page

MAKING THE MOST OF DYNAMICS MAY BE THE KEY TO YOUR FUTURE

Save Credit Card

First Name	<input type="text" value="Customer"/>		Last Name	<input type="text" value="Portal"/>	
Company Name	<input type="text" value="Adatum Corporation"/>		Address	<input type="text" value="192 Market Square"/>	
City	<input type="text" value="Atlanta"/>	State	<input type="text" value="GA"/>	Zip Code	<input type="text" value="31772"/>
Country Code	<input type="text" value="US"/>	Email	<input type="text" value="betty@sbcdynamicserp.com"/>		Phone No
Card Number	<input type="text" value="4111111111111111"/>		<small>ⓘ VISA Card number length must be 16 digit</small>	MM	<small>ⓘ Valid month</small>
				<input type="text" value="02"/>	<small>ⓘ Valid year</small>
				YY	<input type="text" value="27"/>
				CVV	<input type="text" value="123"/>



New Card Created on Business Central

←

Credit Card

✓ Saved

CC0000028

Home

Navigate

More options

Create Payment Profile

Update Credit Card

View Credit Card Details

General

No. CC0000028 ...

Customer No. 10000

Contact No.

Type VISA ▾

Number *****1111

Expiry Date (MMYY) 0227

First Name Customer

Last Name Portal

Company Name Adatum Corporation

Merchant ID DEFAULT ▾

Default ☒

Customer Profile ID

Customer Payment Pr...

Original Network Tran...

Original Auth. Amount ... 0.00

AVS Hold ☐

AVS Code Y

Card Has Warning ☐

Card Warnings

Inactive ☐

Communication

Address

Address 192 Market Square

Address 2

Zip Code 31772 ▾

City Atlanta ▾

State GA

Country/Region Code ... US ▾

Contact

Phone No.

Mobile Phone No. 987654321

Fax No.

EMail betty@sbcdynamicserp.com

1.2. Bank Account Details

This feature works the same way as Credit Card except for the payment details to be filled are different.

Customer Card on Business Central

The screenshot shows the Dynamics 365 Business Central interface for a Customer Card. The card is for '10000 · Adatum Corporation'. The 'Send Save Bank Link' button is highlighted with a red box. The card displays various financial and operational details.

Field	Value
No.	10000
Name	Adatum Corporation
IC Partner Code	
Balance (\$)	53,489.86
Balance (\$) As Vendor	0.00
Balance Due (\$)	51,466.59
Credit Limit (\$)	0.00
Blocked	
Privacy Blocked	<input type="checkbox"/>
Salesperson Code	BC
Responsibility Center	BIRMINGHAM
Service Zone Code	
Document Sending Profile	
Total Sales - Fiscal Year	14,469.43
Costs (\$)	12,142.90
Profit (\$)	2,326.53
Profit %	16.1
Last Date Modified	9/3/2024
Disable Search by Name	<input type="checkbox"/>

Email notification to use to update Bank Details

The screenshot shows an email notification titled 'Save Bank Link' from Business Central Developer to Betty Chebet Too. The email contains a link to save bank details.

Save Bank Link

Business Central Developer
To: Betty Chebet Too

Wed 10/02/2024 1:35 PM


Dear Sirs,

Thank you for your business. Please use the following link to save your Bank Info

<http://localhost:8080/SavePaymentDetails/ACHBank/?CustomerNo/AAPB01/60750178-55E9-ED11-8850-6045BDE98BBA>

cronus

Save Bank update page:

MAKING BUSINESS DYNAMICS SAY YES TO HOW THE WORLD WORKS

Save Bank Details

Fetch ACH Bank Account

Note: choose only one ACH Bank account

Customer Details

First Name

Customer

Last Name

Portal

Company Name

Adatum Corporation

Address

192 Market Square

City

Atlanta

State

GA

Zip Code

31772

Country Code

US

Email

betty@sbcdynamicserp.com


Phone No

0800012354

Bank Details

Bank Name

Bank of America



Name On Account

Customer Portal

Account Number


1111222233330000

ABA Routing Number

122016066

Bank Account Type

Personal Checking



New Bank created on Business Central

ACH Bank Account Card

✓ Saved

ACH00000016

Home

Navigate

More options

Save To CIM

General

No. ACH00000016 ...

Customer No. 10000

Contact No.

Company Name Adatum Corporation

Bank Name Bank of America

Name On Account Customer Portal

Bank Account Number *****0000

ABA Routing Number 122016066

Account Type Personal Checking ▾

Merchant ID DEFAULT ▾

Default ☒

Customer Profile ID

Customer Payment Pr... ..

Original Network Tran... ..

Original Auth. Amount 0.01

AVS Hold ☐

AVS Code P

Account Has Warning ☐

Account Warnings

Inactive ☐

Communication

Address

Address 192 Market Square

Address 2

Zip Code 31772 ▾

City Atlanta ▾

State GA

Country/Region Code US ▾

Contact

Phone No.

Mobile Phone No. 0800012354

Fax No.

EMail betty@sbcdynamicserp.com

2. Customer Payment Processing

Through a PaybyLink link shared from Business Central, a customer is able to process payments for their Open Orders/Invoices and Closed Invoices and is updated in Business Central.

Sales Order in Business Central:

Sales Order
S-ORD101148 · Adatum Corporation

Home Prepare Print/Send Request Approval Order Report Acumens e-Tax & Address Verify Acumens ePayments Acumens Customer Portal More options

Send Pay By Link

Acumens e-Tax & Address Verify

Ship-to Address Verified ☐ Tax Exemption Type
Zip+4 Address Updated ☐ Sales Tax Calculated ☒
Tax Liable ☒ Sales Tax Errors 0
Tax Area Code T0041 Sales Tax % 8.0
Shipping Taxable ☐ Report to City
Charge Use Tax ☐ Report to County
Market Place

Shipping and Billing PARK ROAD 9/10/2024

Lines Manage Line Order

New Line Delete Line Select items... Suggest sales lines

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code
Item	1000		Bicycle	MAIN	1			PCS
Resource	KATHERINE		KATHERINE HULL	MAIN	1			HOUR

Subtotal Excl. Tax (USD) 173.40 Total Excl. Tax (USD) 173.40
Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 13.87
Invoice Discount % 0 Total Incl. Tax (USD) 187.27

Payment Info FactBox

Card Type
Credit Card Number
Amount Authorized 0.00
Amount Captured 0.00
More Information More Information

Sell-to Customer Sales History

Customer No. 10000

5 Ongoing Sales Quotes	1 Ongoing Sales Blanket Orders	91 Ongoing Sales Orders
9 Ongoing Sales Invoices	5 Ongoing Sales Return Orders	3 Ongoing Sales Credit Memos
106 Posted Sales Shipments	101 Posted Sales Invoices	2 Posted Sales Return Receipts
8 Posted Sales Credit Memos	0 GP Sales Transactions	0 GP Receivables Transactions

Customer Details

Email notification with link to use for payment:

Pay By Link

Business Central Developer
To: Betty Chebet Too

If there are problems with how this message is displayed, click here to view it in a web browser.

Translate message to: English Never translate from: Japanese Translation preferences

Dear Sirs,

Thank you for your business. Please use the following link to pay for your order.

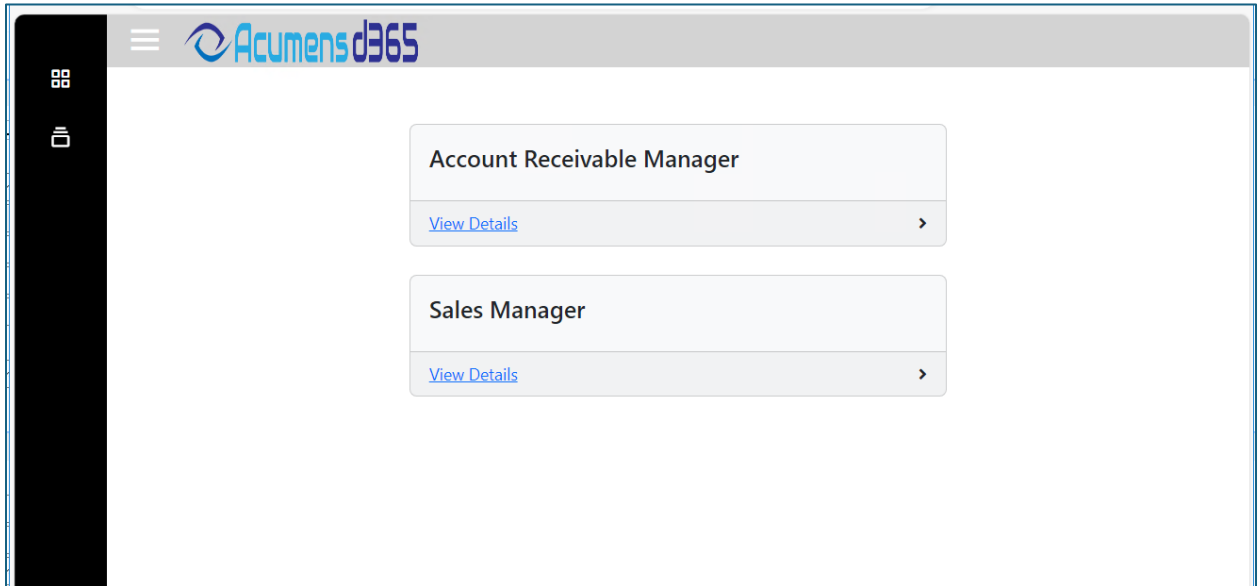
<http://localhost:8080/PayByLink?PartnerAccountNo/AAPB01/2D18D1F1AAA64FFD93BBEBA312C0DF94>

cronus

PaybyLink Page:

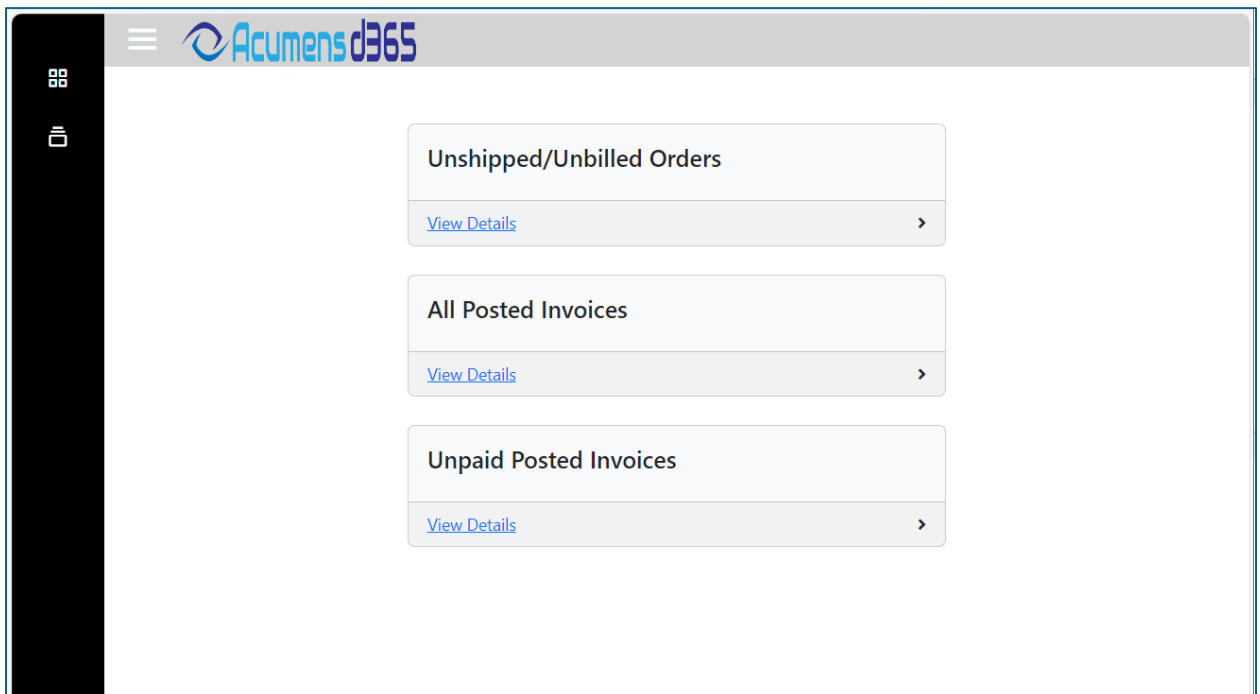
3. Customer/Salesperson Portal

This portal has two components to it, Customer Portal (Account Receivable Manager profile) and Salesperson Portal (Sales Manager profile)



3.1. Customer Portal

On Customer portal, user accesses Unshipped/Unbilled Orders, All Posted Invoices and Unpaid Posted Invoices specific to a customer.



Payments can be processed for Unshipped/Unbilled Orders and Unpaid Posted Invoices.

Customer Portal supports both Acumens e-Payments and Acumens e-POS for payment processing.

Acumens d365

Unshipped/Unbilled Orders

Payment

Search

<input type="checkbox"/>	Document Type	Document No	Posting Date	Posting Description	Amount Incl. Tax	Unposted CC Amount	Convenience Fee	Amount to Charge	Sell to Customer Name	Partner #
<input checked="" type="checkbox"/>	Order	ASM-SM00007	08/09/2024	Service material for asm service order # ASM-SO00024	\$595.30	\$0.00	\$0.00	\$595.30	Adatum Corporation	P00001
<input type="checkbox"/>	Order	ASM-SO00001	07/08/2024	Order ASM-SO00001	\$889.70	\$0.00	\$0.00	\$889.70	Adatum Corporation	P00001
<input type="checkbox"/>	Order	ASM-SO00003	07/08/2024	Order ASM-SO00003	\$1,407.85	\$0.00	\$0.00	\$0.00	Adatum Corporation	P00001
<input type="checkbox"/>	Order	ASM-SO00004	07/08/2024	Order ASM-SO00004	\$336.02	\$0.00	\$0.00	\$336.02	Adatum Corporation	P00001
<input type="checkbox"/>	Order	ASM-SO00017	07/10/2024	Order ASM-SO00017	\$249.96	\$0.00	\$0.00	\$249.96	Adatum Corporation	P00001
<input type="checkbox"/>	Order	ASM-SO00023	07/18/2024	Order ASM-SO00023	\$132.10	\$0.00	\$0.00	\$132.10	Adatum Corporation	P00001
<input type="checkbox"/>	Order	ASM-SO00026	09/02/2024	Order ASM-SO00026	\$100.01	\$0.00	\$0.00	\$92.60	Adatum Corporation	P00001
<input type="checkbox"/>	Order	ASM-SO00027	09/02/2024	Order ASM-SO00027	\$350.00	\$0.00	\$0.00	\$350.00	Adatum Corporation	P00001
<input type="checkbox"/>	Order	S-ORD101005	06/01/2022	Order S-ORD101005	\$2,835.00	\$0.00	\$0.00	\$2,835.00	Adatum Corporation	P00001
<input type="checkbox"/>	Order	S-ORD101006	06/01/2022	Order S-ORD101006	\$583.38	\$0.00	\$0.00	\$583.38	Adatum Corporation	P00001

Showing 1 to 10 of 85 rows 10 rows per page

1 2 3 4 5 9

Acumens d365

Unshipped/Unbilled Orders

Back

Payment

First Name
Customer

Last Name
Portal

Company Name
Adatum Corporation

Address
192 Market Square

City
Atlanta

State
GA

Zip Code
31772

Country Code
US

Email
betty@sbcdynamicserp.com;edwin@sbcdynamic

Phone No.

Card Number
*****1111

MM
12

YYYY
2024

CVV
123

Confirm Payment \$595.30

Payment Type
Existing Card

Credit Cards
VISA, *****1111,12/2024

Total for All Documents

Total Amount \$595.30

Payment Discount \$0.00

Amount Charged \$0.00

Convenience Fee \$0.00

Amount To Charge \$595.30

Document No. ASM-SM00007

Total Amount \$595.30

Payment Discount \$0.00

Amount Charged \$0.00

Convenience Fee \$0.00

Amount To Charge \$595.30

Credit Card log entry created in Business Central:

The screenshot shows the 'AEP Transaction Log Entries' page in Dynamics 365 Business Central. The page has a top navigation bar with the title 'Dynamics 365 Business Central' and a user profile. Below the navigation bar is a sub-navigation bar with icons for 'Apply Transactions', 'Void Authorization', 'Void Capture', 'Print', 'Email', and 'More options'. The main content area displays a table of transaction log entries. The table has columns for Document Type, Document No., Customer No., Card Type, Credit Card No., Credit Card Number, ACH Bank No., Bank Name, Bank Acc. Number, Transaction Type, Transaction Result, Transaction Status, Transaction Description, and Transaction Time. A single entry is visible with the following details:

Document Type	Document No.	Customer No.	Card Type	Credit Card No.	Credit Card Number	ACH Bank No.	Bank Name	Bank Acc. Number	Transaction Type	Transaction Result	Transaction Status	Transaction Description	Transaction Time
Order	ASM-SM00007	10000	VISA	5509000013	*****				Charge	Success	Posting No...	Payment transaction has been ...	10/2/24

3.2. Salesperson portal

Inside this profile, a salesperson can create a master sales order that they use to make sales order requests, and these are updated in Business Central.

The screenshot shows the 'Master Sales Orders' portal in the Acumens d365 system. The page has a header with the Acumens d365 logo and a sidebar with navigation icons. The main content area features a search bar for 'Customer No.' with a dropdown menu showing '10000 (The Cannon Group PLC)'. Below the search bar is a table of master sales orders. The table has columns for Customer No., Customer Name, Ship-To Code, Ship-To Name, Ship-To Address, Ship-To City, Salesperson Code, Responsibility Center, Last Order Submit Date, and Action. A single entry is visible with the following details:

Customer No.	Customer Name	Ship-To Code	Ship-To Name	Ship-To Address	Ship-To City	Salesperson Code	Responsibility Center	Last Order Submit Date	Action
10000	The Cannon Group PLC	PARK ROAD	The Cannon Group PLC	10 Park Road	Atlanta	MD	BIRMINGHAM	08-22-2024	Edit

The screenshot shows the 'Master Sales Order' portal in the Acumens d365 system. The page has a header with the Acumens d365 logo and a sidebar with navigation icons. The main content area features a search bar for 'Customer No.' with a dropdown menu showing '10000 (The Cannon Group PLC)'. Below the search bar is a table of master sales orders. The table has columns for Customer No., Customer Name, Ship-To Code, Ship-To Name, Ship-To Address, Ship-To City, Salesperson Code, Responsibility Center, Last Order Submit Date, and Action. A single entry is visible with the following details:

Customer No.	Customer Name	Ship-To Code	Ship-To Name	Ship-To Address	Ship-To City	Salesperson Code	Responsibility Center	Last Order Submit Date	Action
10000	The Cannon Group PLC	PARK ROAD	The Cannon Group PLC	10 Park Road	Atlanta	MD	BIRMINGHAM	08-22-2024	Edit

Below the table, there is a section for 'Order Amount: \$32,000.00' and 'Total Cases: 21'. The main content area also displays a table of order details. The table has columns for No., Department, Extended Description, Order Qty, Qty on Hand, Unit Price, Order No., Order Date, Prev Order Date 1, Prev Order Qty 1, Prev Order Date 2, and Prev Order Qty 2. The table contains 6 rows of data:

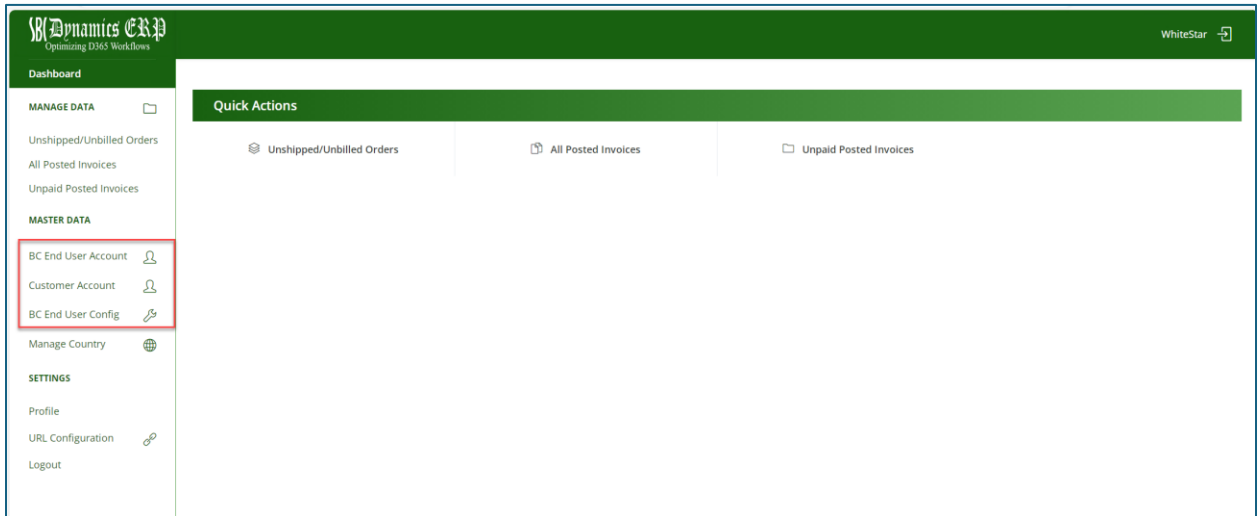
No.	Department	Extended Description	Order Qty	Qty on Hand	Unit Price	Order No.	Order Date	Prev Order Date 1	Prev Order Qty 1	Prev Order Date 2	Prev Order Qty 2
1000	DEPT	Bicycle	1	50	\$4,000.00	1253	06-17-2024	05-04-2024	5	05-03-2024	5
1001	DEPT	Touring Bicycle	6	-3	\$4,000.00	1253	08-21-2024	04-30-2024	4	04-29-2024	1
1100	DEPT	Front Wheel	2	-1	\$1,000.00	1253	08-21-2024	05-04-2024	2	05-03-2024	5
1110	DEPT	Rim	5	0	\$0.00	1253	08-21-2024				
1120	DEPT	Spoke	3	-6	\$0.00	1253	08-21-2024				
1150	DEPT	Front Hub	4	0	\$500.00	1253	08-21-2024				

4. Reseller Portal

This portal is designed for resellers and has three tier accounts i.e. Reseller, BC End Users and Customers. Its features are similar to Customer Portal but with a wider business coverage. Payment processing can only be done on the customer tier. Reseller portal supports Acumens e-Payments for payment processing.

4.1. Reseller Profile:

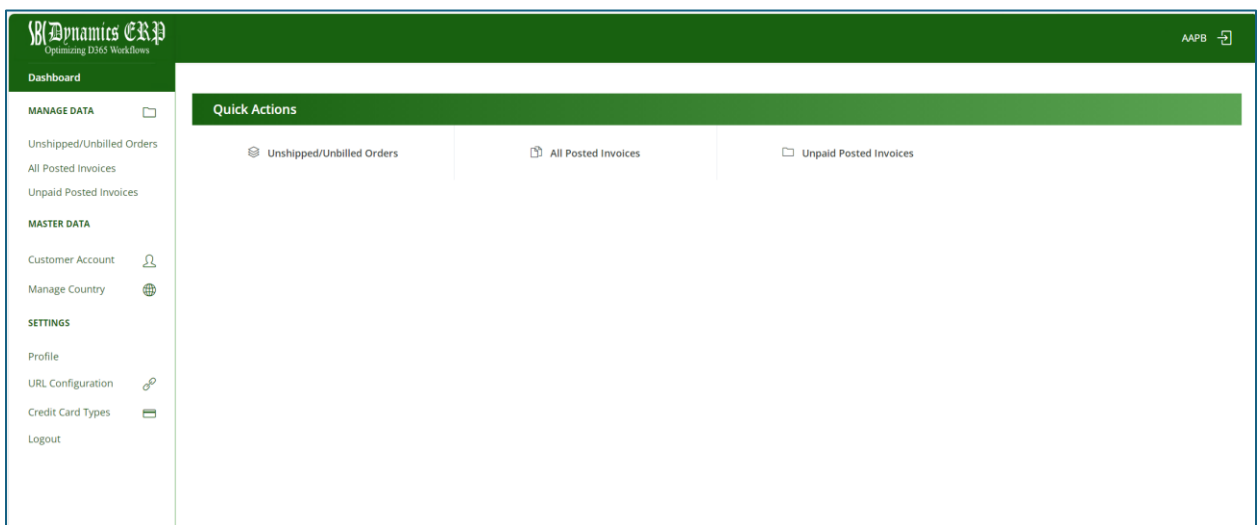
In this profile, a Reseller can set up BC End Users and Customer accounts for BC End Users.



4.2. BC End User Profile:

This profile accesses the BC End User database.

Unshipped/Unbilled Orders, All Posted invoices and Unpaid Posted Invoices displayed on this profile are all database records without any filters



4.3. Customer Profile

This is a customer specific profile i.e. the records fetched to this profile are customer specific.

Payments are also processed on this profile.

SB Dynamics ERP
Optimizing D365 Workflows

SKM

Dashboard

MANAGE DATA

Unshipped/Unbilled Orders

All Posted Invoices

Unpaid Posted Invoices

SETTINGS

Profile

Logout

Unshipped/Unbilled Orders

Payment Type

Card List

Existing Card

*****1111 02/27

Process Payment

Copy

Excel

Show 10 rows

Search:

Select	Document Type	Document No	Posting date	Description	Amount Incl.Tax	Unposted CC Amount	Transaction Fee	Amount to Capture
<input type="checkbox"/>	Order	S-ORD101005	06/01/2022	Order S-ORD101005	\$ 2,835.00	\$2,835.00	\$0.00	\$0.00
<input type="checkbox"/>	Order	S-ORD101006	06/01/2022	Order S-ORD101006	\$ 583.38	\$583.38	\$0.00	\$0.00
<input type="checkbox"/>	Order	S-ORD101007	06/07/2024	Order S-ORD101007	\$ 472.50	\$472.50	\$0.00	\$0.00
<input checked="" type="checkbox"/>	Order	S-ORD101008	06/01/2022	Order S-ORD101008	\$ 63.00	\$0.00	\$0.00	\$63.00
<input type="checkbox"/>	Order	S-ORD101009	04/10/2023	Order S-ORD101009	\$ 1,000.80	\$0.00	\$0.00	\$1,000.80
<input type="checkbox"/>	Order	S-ORD101012	06/01/2023	Order S-ORD101012	\$ 1,000.80	\$0.00	\$0.00	\$1,000.80
<input type="checkbox"/>	Order	S-ORD101013	06/06/2023	Order S-ORD101013	\$ 1,000.80	\$0.00	\$0.00	\$1,000.80
<input type="checkbox"/>	Order	S-ORD101014	06/07/2023	Order S-ORD101014	\$ 1,000.80	\$1,000.80	\$0.00	\$0.00
<input type="checkbox"/>	Order	S-ORD101015	06/07/2023	Order S-ORD101015	\$ 1,000.80	\$0.00	\$0.00	\$1,000.80
<input type="checkbox"/>	Order	S-ORD101017	06/07/2023	Order S-ORD101017	\$ 15.11	\$15.11	\$0.00	\$0.00

Showing 1 to 10 of 84 entries

Previous

1

2

3

4

5

...

9

Next

SB Dynamics ERP
Optimizing D365 Workflows

SKM

Dashboard

MANAGE DATA

Unshipped/Unbilled Orders

All Posted Invoices

Unpaid Posted Invoices

SETTINGS

Profile

Logout

Payment

MS Dynamics NAV/BC / Payment

First Name

Last Name

Customer

Portal

Company Name

Address

Adatum Corporation

192 Market Square

City

State

zip

Atlanta

GA

31772

Country Code

Email

Phone No

USA

betty@sbcdynamicserp.com

987654321

Card Number

MM

YY

CVV

*****1111

VISA

02

27

123

Valid month

Valid year

Confirm Payment

Total for All Documents

Total Amount

Payment Discount

Amount Charged

Transaction Fee

Amount to Charge

\$63.00

\$0.00

\$0.00

\$0.00

\$63.00

Document No. S-ORD101008

Total Amount

Payment Discount

Amount Charged

Transaction Fee

Amount to Charge

\$63.00

\$0.00

\$0.00

\$0.00

\$63.00

Credit card Log entries created in Business Central

Dynamics 365 Business Central												
AEP Transaction Log Entries												
Apply Transactions Void Authorization Void Capture Print Email More options												
Document Type	Document No.	Customer No.	Card Type	Credit Card No.	Credit Card Number	ACH Bank No.	Bank Name	Bank Acc. Number	Transaction Type	Transaction Result	Transaction Status	Transaction Description
Order	S-ORD101008	10000	VISA	0000000020	*****				Charge	Success	Posting No...	Payment transaction has been ... 10/2/2