

Acumens Document Approvals Management- Usage Scenarios Documentation.

Versions Supported:

Dynamics BC 24

Prepared & developed by

SBC Dynamics ERP

Document History

Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
1.0	August 2024		Document Prepared

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1 Application Overview

Acumens Document Approvals Management extends standard Microsoft Dynamics Business Central Document Approvals by introducing the features below:

- Mandatory Approval comments before sending for approval.
- Mandatory Attachments before sending for approval.
- Dynamic Approval Levels.
- Alternate Approvers per approval level.
- Allow shipping/receipting before sending for Approvals.
- User Defined Notifications.

This feature is extended for the following documents:

- All Standard Sales Documents.
- All Standard Purchase Documents.
- General Journals.
- Item Journals.

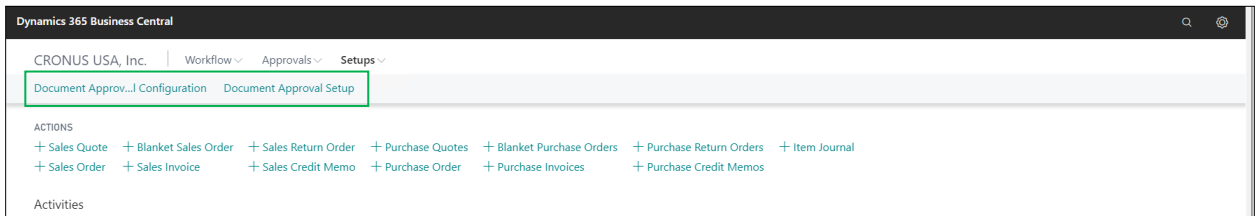
2 System Requirements

Acumens Document Approvals Management extension for BC365 supports all BC365 deployment scenarios and imposes no additional requirements nor restrictions on the standard system requirements for BC365.

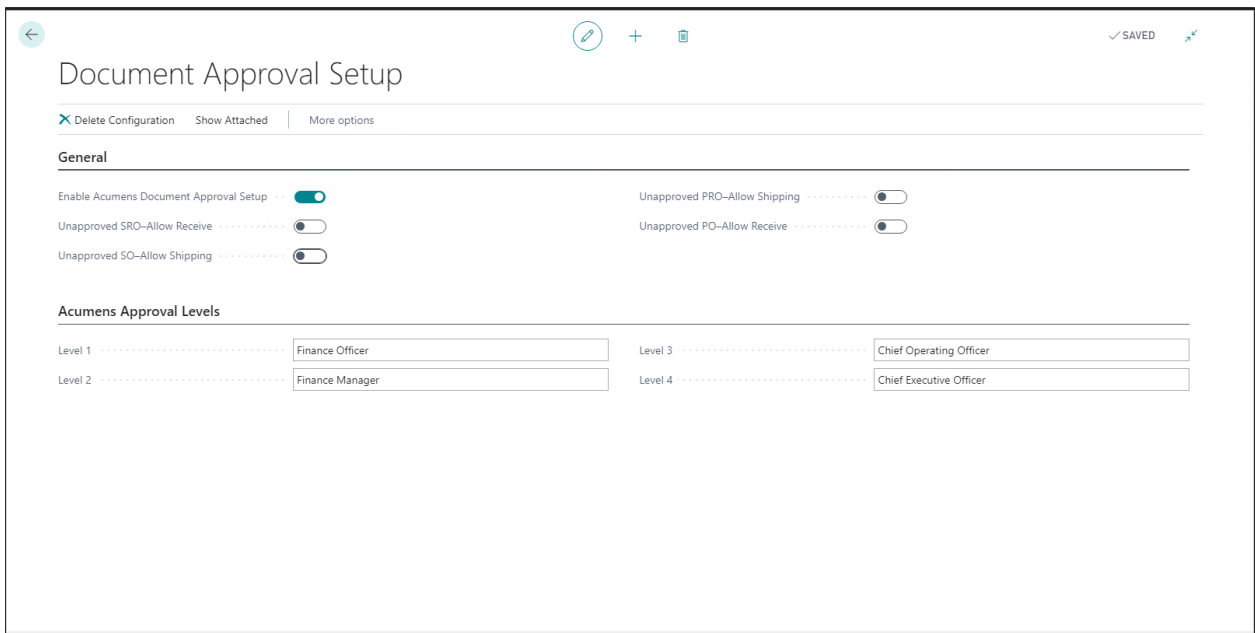
Acumens Document Approvals Management requires Microsoft Dynamics 365 Business Central version 14.00 or later and works with all BC365 clients (Dynamics NAV Web Client, Dynamics NAV Tablet Client, Dynamics NAV Phone Client (in a Browser) and Dynamics NAV Universal App)

2 Setups

Acumens Document Approvals Management has three main setups.



Acumens Documents Approval Setup-This is the main setup, used to activate the application and set up the dynamic captions for each level of approval. The setup also activates the default configurations of approval documents.



Once the user launches the setup page the application will automatically be enabled. The user populates the custom approval levels.

CRONUS USA, Inc. Workflow ▾ Approvals ▾ Setups ▾ ☰				
Document Approval Configuration: All ▾ 🔍 Search 🗑️ Delete ✎ Edit List 📄 📏				
Document Type	Finance Officer	Finance Manager	Chief Operating Officer	Chief Executive Officer
Item Journals Batch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Journals Batch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Return Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Blanket Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Credit Memo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Quote	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Return Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Credit Memo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Blanket Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Quote	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Journals Line	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item Journals Line	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

←

✎ + 🗑️

✓ SAVED ✎

Document Approval Setup

✕ Delete Configuration

Show Attached

More options

General

Enable Acumens Document Approval Setup ☒

Unapproved PRO-Allow Shipping ☐

Unapproved SRO-Allow Receive ☐

Unapproved PO-Allow Receive ☐

Unapproved SO-Allow Shipping ☐

Acumens Approval Levels

Level 1

Level 2

Level 3

Level 4

Acumens Documents Approval Configuration-It allows the user to edit how many levels a document goes through during the approval process.

Notification Setup-This setup allows the administrators to set up the preferred notification method for users. The setup is done in the **Approval User Setup**. The user clicks on the **Notification Setup** and selects the preferred notification method.

The Setup is per user, users who are not setup will not receive notifications.

Dynamics 365 Business Central

CRONUS USA, Inc. APPROVAL USER SETUP | WORK DATE: 11/23/2023

Search + New Edit List Delete Approval User Setup Test Notification Setup Show Attached Open in Excel More options

USER ID ↑	SALESPERS/P... CODE	APPROVER ID	SALES AMOUNT APPROVAL LIMIT	UNLL... SALES APPR...	PURCHASE AMOUNT APPROVAL LIMIT	UNLL... PURC... APPR...	REQUEST AMOUNT APPROVAL LIMIT	UNLL... REQU... APPR...	SUBSTITUTE	E-MAIL	APPR... ADML...
SBC\ADMINISTR...				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	SBC\BETTY	caroline@sbcdynamicserp.com	<input type="checkbox"/>
SBC\BERNARD		SBC\ADMINISTR...		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	SBC\SBCNAV	caroline@sbcdynamicserp.com	<input type="checkbox"/>
SBC\BETTY				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	SBC\CAROLINE	caroline@sbcdynamicserp.com	<input checked="" type="checkbox"/>
SBC\CAROLINE				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		caroline@sbcdynamicserp.com	<input type="checkbox"/>
SBC\DIPIAK				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		caroline@sbcdynamicserp.com	<input type="checkbox"/>
SBC\IVAN				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		caroline@sbcdynamicserp.com	<input type="checkbox"/>
SBC\LRUSH				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		caroline@sbcdynamicserp.com	<input type="checkbox"/>
SBC\NILESH				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		caroline@sbcdynamicserp.com	<input type="checkbox"/>
SBC\RICHARD				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	SBC\BETTY	caroline@sbcdynamicserp.com	<input type="checkbox"/>
SBC\SBCNAV				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	SBC\CAROLINE	caroline@sbcdynamicserp.com	<input type="checkbox"/>
SBC\VINCENT				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		caroline@sbcdynamicserp.com	<input type="checkbox"/>

Dynamics 365 Business Central

CRONUS USA, Inc. APPROVAL USER SETUP | WORK DATE: 11/23/2023

Search + New Edit List Delete Notification Schedule Show Attached ...

NOTIFICATION TYPE ↑	NOTIFICATION METHOD	SCHEDULE	DISPLAY TARGET
Approval	Both	Instantly	Web

Notification Method dropdown options: Email, Note, Both

E-MAIL	APPR... ADML...
caroline@sbcdynamicserp.com	<input type="checkbox"/>
caroline@sbcdynamicserp.com	<input type="checkbox"/>
caroline@sbcdynamicserp.com	<input checked="" type="checkbox"/>
caroline@sbcdynamicserp.com	<input type="checkbox"/>
caroline@sbcdynamicserp.com	<input type="checkbox"/>
caroline@sbcdynamicserp.com	<input type="checkbox"/>
caroline@sbcdynamicserp.com	<input type="checkbox"/>
caroline@sbcdynamicserp.com	<input type="checkbox"/>
caroline@sbcdynamicserp.com	<input type="checkbox"/>
caroline@sbcdynamicserp.com	<input type="checkbox"/>
caroline@sbcdynamicserp.com	<input type="checkbox"/>
caroline@sbcdynamicserp.com	<input type="checkbox"/>

A sample Role Center Notifications

Notifications ▾

ID	CREATED BY	RECIPIENT USER ID	NOTIFICATION	CREATED DATE-TIME	TYPE	CUSTOM LINK ↓
345	SBC\CAROLINE	SBC\BETTY	Sales Order 2004 requires your approval.	11/3/2023 9:44 AM	Approval	http://nst1:8080/SMFeeApp/Default?tenant=default&cor
344	SBC\CAROLINE	SBC\BETTY	Sales Order 1002 requires your approval.	11/3/2023 9:27 AM	Approval	http://nst1:8080/SMFeeApp/Default?tenant=default&cor
342	SBC\CAROLINE	SBC\BETTY	Sales Order 2003 requires your approval.	11/3/2023 9:24 AM	Approval	http://nst1:8080/SMFeeApp/Default?tenant=default&cor
334	SBC\CAROLINE	SBC\BETTY	Sales Order 1002 requires your approval.	11/3/2023 9:18 AM	Approval	http://nst1:8080/SMFeeApp/Default?tenant=default&cor
332	SBC\CAROLINE	SBC\BETTY	Sales Order 2002 requires your approval.	11/3/2023 9:16 AM	Approval	http://nst1:8080/SMFeeApp/Default?tenant=default&cor
331	SBC\CAROLINE	SBC\BETTY	Sales Order 2001 requires your approval.	11/3/2023 8:33 AM	Approval	http://nst1:8080/SMFeeApp/Default?tenant=default&cor
330	SBC\CAROLINE	SBC\BETTY	Sales Order 1002 requires your approval.	11/3/2023 8:27 AM	Approval	http://nst1:8080/SMFeeApp/Default?tenant=default&cor

A sample Email notification

Notification Overview



Business Central Developer
To: Caroline Kosgei

Hello ,

You are registered to receive notifications related to CRONUS USA, Inc..
This is a message to notify you that:

Gen. Journal Batch GENERAL,TEST18 has been approved.

Description

Due Date 12/08/23

Template Type **General**

[Gen. Journal Batch GENERAL TEST18](#)

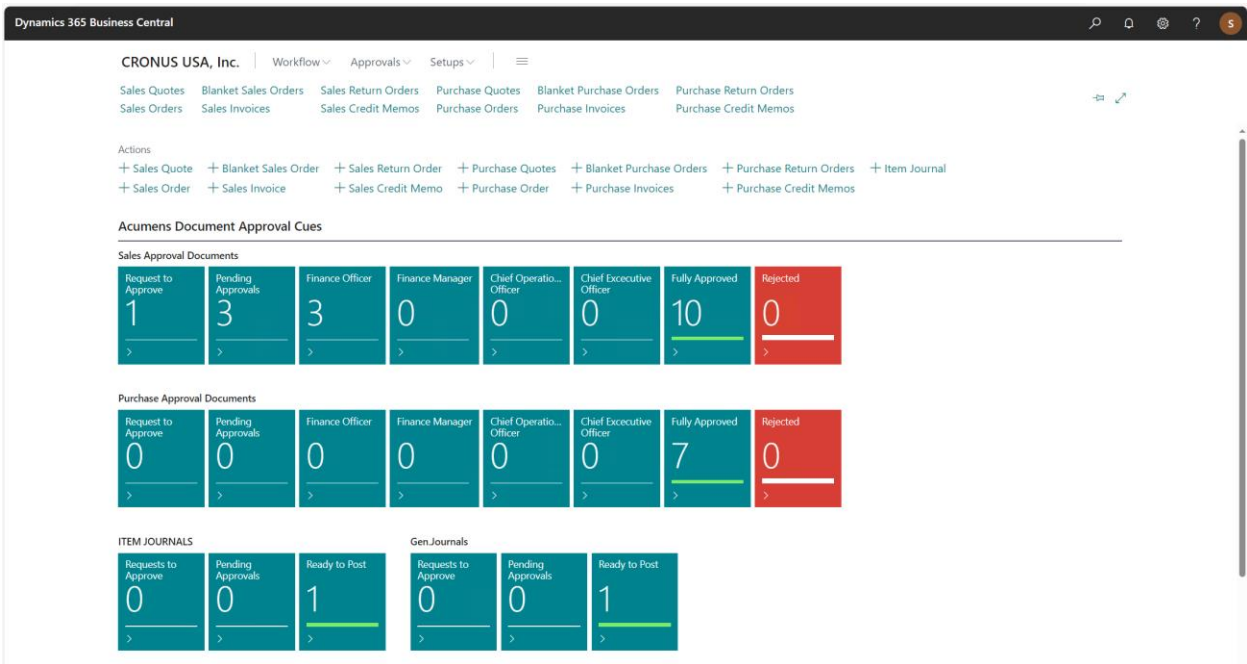
Details **Created By SBC\CAROLINE**

Notification messages are sent automatically and cannot be replied to. But you can change when and how you receive notifications: [Notification Settings \(Windows Client\)](#)

3 Usage

3.1 Role center and Dashboard Cues:

Below is the Document Approvals admin user role center.



3.2 Comments and Attachments

Approval comments and Attachments are mandatory before sending the document for approval.

Dynamics 365 Business Central

Sales Order | Work Date: 1/23/2025

✓ Saved

1001 · The Cannon Group PLC

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[Approval Comments](#) [Attachments](#) [Send Approval Request](#) [Cancel Approval Request](#) [Approvals](#)

General

[Show more](#)

No.	1001	Due Date	2/23/2025
Customer Name	The Cannon Group PLC	Requested Delivery Date	
Contact	Mr. Andy Teal	External Document No.	
Posting Date	1/23/2025	CFDI Export Code	
Tax Date	1/23/2025		
Order Date	1/23/2025		

Acumens Document Approvals

Status: Open

[Lines](#) [Manage](#) [Line](#) [Order](#)

[New Line](#) [Delete Line](#) [Select items...](#)

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code
→ Item	1000		Bicycle	BLUE	1			PCS

Subtotal Excl. Tax (USD) 4,000.00 Total Excl. Tax (USD) 4,000.00

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 0.00

Details

Attachments (0)

Sell-to Customer Sales History

Customer No. 10000

0	0	9
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
6	3	1
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
1		
Posted Sales Credit Memos		

Customer Details

Customer No. 10000

Name The Cannon Group PLC

Phone No.

Email

Fax No.

Credit Limit (\$) 0.00

Available Credit (\$) 0.00

Discount Terms Code

3.3 Dynamic Approval Levels:

The setup below is used to define the dynamic approval levels.

Defined Levels:

Dynamics 365 Business Central

Work Date: 1/23/2025

Acumens Document Approval Setup

Delete Configuration

General

Enable Acumens Document Approval Setup

Unapproved SRO-Allow Receive

Unapproved SO-Allow Shipping

Unapproved PRO-Allow Shipping

Unapproved PO-Allow Receive

Acumens Approval Levels

Level 1

Level 2

Level 3

Level 4

Finance Officer

Finance Manager

Chief Operations Officer

Chief Executive Officer

Defined levels per Document:

Dynamics 365 Business Central

Document Approval Configuration | Work Date: 1/23/2025

Search Edit List Delete

Document Type	Finance Officer	Finance Manager	Chief Operations Officer	Chief Executive Officer
→ Item Journals Batch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Journals Batch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Return Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Blanket Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Credit Memo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Quote	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Return Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Credit Memo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Blanket Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Quote	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Journals Line	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item Journals Line	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Example:

Sales Order has one defined approval level.

Document with Pending Approval

Sales Order | Work Date: 1/23/2025

✓ Saved

2004 · The Cannon Group PLC

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Prepare

Approve

Acumens ePOS

Credit Memo

Report

Acumens Document Approvals

More options

Post...

Create Warehouse Shipment

Archive Document

Release

Create Inventory Put-away/Pick...

General

Show more

Customer Name

The Cannon Group PLC

Due Date

2/23/2025

Contact

Mr. Andy Teal

Requested Delivery D...

Posting Date

1/23/2025

External Document No.

Tax Date

1/23/2025

CFDI Export Code

Order Date

1/23/2025

CFDI Period

Diario

Acumens Document Approvals

Status

Pending Approval

Approval Status

Finance Officer

Lines

Manage

Line

Order

New Line

Delete Line

Select items...

Type	No.	Item Reference No.	Description	Location Code	Quantity
→ Item	1000		Bicycle	BLUE	30

Subtotal Excl. Tax (US...

90,000.00

Total Excl. Tax (USD)

90,000.00

Inv. Discount Amount...

0.00

Total Tax (USD)

0.00

Released Document:

Sales Order | Work Date: 1/23/2025

✓ Saved

2003 · The Cannon Group PLC

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Post...

▼

Create Warehouse Shipment

Archive Document

Release

▼

Create Inventory Put-away/Pick...

General

Show more

Customer Name

The Cannon Group PLC

Due Date

2/23/2025

Contact

Mr. Andy Teal

Requested Delivery D...

Posting Date

1/23/2025

External Document No.

Tax Date

1/23/2025

CFDI Export Code

Order Date

1/23/2025

CFDI Period

Diario

Acumens Document Approvals

Status

Released

Approval Status

Approved

Lines

Manage

Line

Order

New Line

Delete Line

Select items...

Type	No.	Item Reference No.	Description	Location Code	Quantity
→ Item	1000		Bicycle	BLUE	1

Subtotal Excl. Tax (US...

4,000.00

Total Excl. Tax (USD)

4,000.00

Inv. Discount Amount...

0.00

Total Tax (USD)

0.00

3.4 Alternate Approvals per Level:

An approval level can have more than one approver. The approvers can be all users in the level or alternate i.e. any of the users can approve and it closes the level.

When Approval level is not alternate, its required that both approvers approve. When one approves, the other entry/entries remain open.

Workflow User Group | Work Date: 1/23/2025

✓ Saved

SO · Sales Order

Code

SO

Description

Sales Order

AQD Document Type

Sales Order

Workflow User Group Members

New Line

Delete Line

User Name ↑	Sequence No.	Alternate	Time Lapse	Approval Levels	AQD Document Type
SBC\BETTY	1	<input type="checkbox"/>		Finance Officer	Sales Order
→ SBC\CAROLINE	1	<input type="checkbox"/>		Finance Officer	Sales Order

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Acumens Document Approvals

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Approval Comments

Attachments

Send Approval Request

Cancel Approval Request

Approvals

General

Show more

No.1002

Due Date2/23/2025

Customer NameThe Cannon Group PLC

Requested Delivery D...

ContactMr. Andy Teal

External Document No.

Posting Date1/23/2025

CFDI Export Code

Tax Date1/23/2025

CFDI PeriodDiario

Order Date1/23/2025

Acumens Document Approvals

StatusPending Approval

Approval StatusFinance Officer

Lines

Manage

Line

Order

New Line

Delete Line

Select items...

Type	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity
→ Item	Bicycle	BLUE	1		-

Subtotal Excl. Tax (US...	4,000.00	Total Excl. Tax (USD)	4,000.00
Inv. Discount Amount...	0.00	Total Tax (USD)	0.00

Search

Delegate

Record

Comments

Show

Overdue	Details	Sequence No.	Status	Sender ID	Salespers./... Code	Approver ID	AQD Auto Approver ID	Approval Status
	The Cannon Group PLC ; Amou...	1	Approved	SBC\BETTY	JO	SBC\BETTY	SBC\BETTY	Finance Officer
-	The Cannon Group PLC ; Amou...	1	Open	SBC\BETTY	JO	SBC\CAROLINE		Finance Officer

When Approval level is alternate, either of the approvers can approve and document is released. The other approval entry/entries are cancelled.

Workflow User Group | Work Date: 1/23/2025

✓ Saved

SO · Sales Order

Code

SO

Description

Sales Order

AQD Document Type

Sales Order

Workflow User Group Members

New Line

Delete Line

User Name ↑	Sequence No.	Alternate	Time Lapse	Approval Levels	AQD Document Type
SBC\BETTY	1	<input checked="" type="checkbox"/>		Finance Officer	Sales Order
→ SBC\CAROLINE	1	<input checked="" type="checkbox"/>		Finance Officer	Sales Order

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①

💬 Approval Comments
📎 Attachments
✉️ Send Approval Request
✖️ Cancel Approval Request
👤 Approvals
⚙️

General

Show more

Customer Name	The Cannon Group PLC	Due Date	2/23/2025
Contact	Mr. Andy Teal	Requested Delivery D...	
Posting Date	1/23/2025	External Document No.	
Tax Date	1/23/2025	CFDI Export Code	
Order Date	1/23/2025	CFDI Period	Diario

Acumens Document Approvals

Status	Released	Approval Status	Approved
--------	----------	-----------------	----------

[Lines](#)
[Manage](#)
[Line](#)
[Order](#)

➕ New Line
✖️ Delete Line
🔍 Select items...

Type	No.	Item Reference No.	Description	Location Code	Quantity
→ Item	1000		Bicycle	BLUE	1

Subtotal Excl. Tax (US...	4,000.00	Total Excl. Tax (USD)	4,000.00
Inv. Discount Amount...	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	4,000.00

🔍 Search
👤 Delegate
📄 Record
💬 Comments
Show

Overdue	Details	Sequence No.	Status	Sender ID	Salespers./... Code	Approver ID	AQD Auto Approver ID	Approval Status
	The Cannon Group PLC ; Amou...	1	Approved	SBC\BETTY	JO	SBC\BETTY	SBC\BETTY	Finance Officer
-	The Cannon Group PLC ; Amou...	1	Canceled	SBC\BETTY	JO	SBC\CAROLINE		Finance Officer

3.5 Allow Shipping/Receipting before Approval:

This allows for shipping or receipting of stock before approval is done or completed. Standard Microsoft Dynamics Business Central does not allow this for a document with an active approval workflow.

This feature is implemented as below:

- i. Unapproved SRO–Allow Receive
- ii. Unapproved SO–Allow Shipping
- iii. Unapproved PRO–Allow Shipping
- iv. Unapproved PO–Allow Receive

Example

Sales Order:

Release Sales Document:

Sales Order | Work Date: 1/23/2025

1005 · The Cannon Group PLC

Home Prepare Acumens ePOS Credit Memo Report Acumens Document Approvals Actions Related Reports Fewer options

Post... Release Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

General

Customer NameThe Cannon Group PLCDue Date2/23/2025

ContactMr. Andy TealRequested Delivery Date

Posting Date1/23/2025External Document No.

Tax Date1/23/2025CFDI Export Code

Order Date1/23/2025CFDI PeriodDiario

Acumens Document Approvals

StatusReleasedApproval StatusNew

Lines

ManageLineOrder

New LineDelete LineSelect Items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	Line Discoun
→ Item	1000		Bicycle	BLUE	1			PCS	4,000.00	ATLANTA, GA	SUPPLIES	

Subtotal Excl. Tax (USD)4,000.00Total Excl. Tax (USD)4,000.00

Inv. Discount Amount Excl. Tax (USD)0.00Total Tax (USD)200.00

Invoice Discount %0Total Incl. Tax (USD)4,200.00

Post shipment:



Sales Order | Work Date: 1/23/2025



✓ Saved



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[Post...](#) [Release](#) [Create Warehouse Shipment](#) [Create Inventory Put-away/Pick...](#) [Archive Document](#)



General

Show more

Customer Name	The Cannon Group PLC	Due Date	2/23/2025
Contact	Mr. Andy Teal	Requested Delivery Date	
Posting Date	1/23/2025	External Document No.	
Tax Date	1/23/2025	CFDI Export Code	
Order Date	1/23/2025	CFDI Period	Diario

Acumens Document Approvals

Status	Released	Approval Status	New
--------	----------	-----------------	-----

Lines | [Manage](#) | [Line](#) | [Order](#)



[New Line](#) [Delete Line](#) [Select Items...](#)

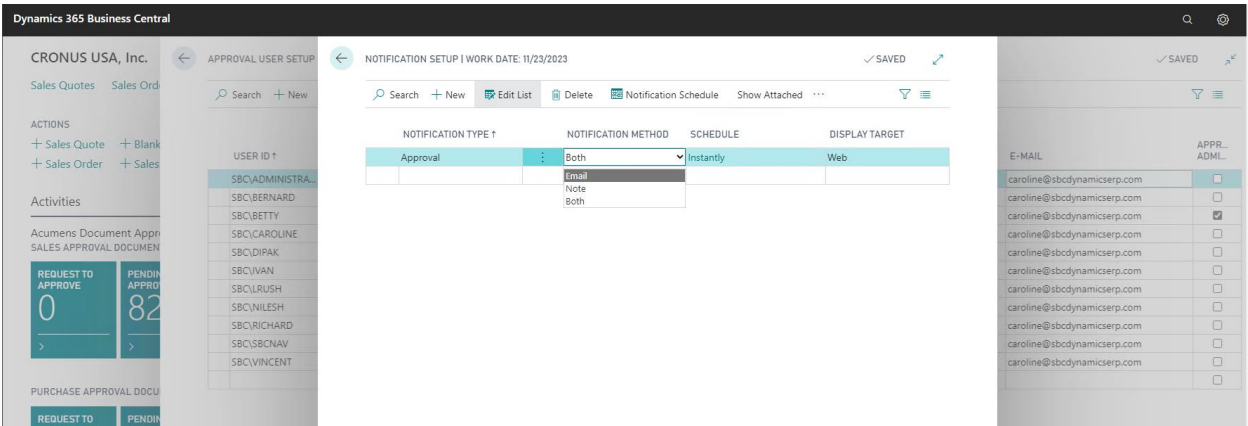


Type	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Qty. to #
→ Item		PCS	4,000.00	ATLANTA, GA	SUPPLIES		4,000.00	4,200.00		1	1		

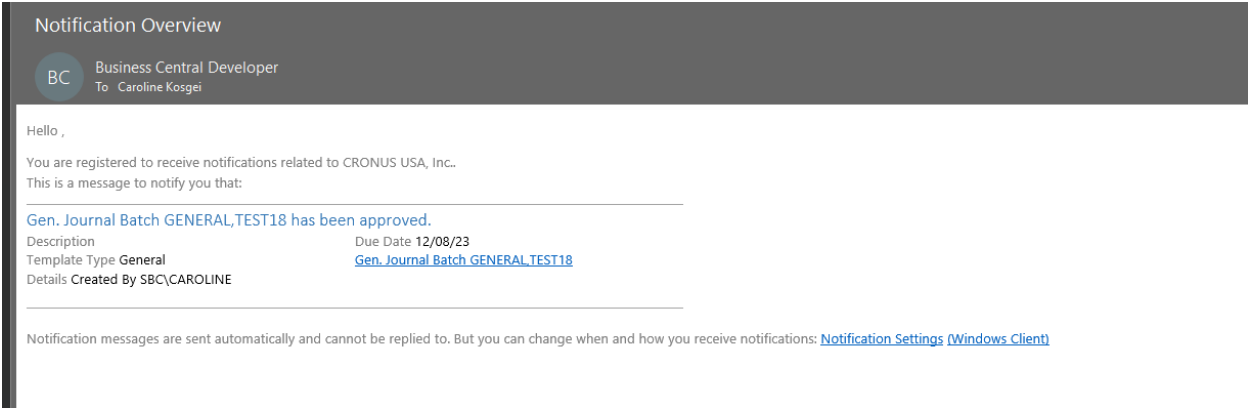
Subtotal Excl. Tax (USD)	4,000.00	Total Excl. Tax (USD)	4,000.00
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	200.00
Invoice Discount %	0	Total Incl. Tax (USD)	4,200.00

3.6 Notifications:

User can be set to receive document approval notifications as email, note or both based on their preferences.



Sample email notification:



Sample Role Center Note notification:

Notifications ▾							
ID	CREATED BY	RECIPIENT USER ID	NOTIFICATION	CREATED DATE-TIME	TYPE	CUSTOM LINK ↓	
345	SBC\CAROLINE	SBC\BETTY	Sales Order 2004 requires your approval.	11/3/2023 9:44 AM	Approval	http://inst1:8080/SMFeeApp/Default?tenant=default&cor	
344	SBC\CAROLINE	SBC\BETTY	Sales Order 1002 requires your approval.	11/3/2023 9:27 AM	Approval	http://inst1:8080/SMFeeApp/Default?tenant=default&cor	
342	SBC\CAROLINE	SBC\BETTY	Sales Order 2003 requires your approval.	11/3/2023 9:24 AM	Approval	http://inst1:8080/SMFeeApp/Default?tenant=default&cor	
334	SBC\CAROLINE	SBC\BETTY	Sales Order 1002 requires your approval.	11/3/2023 9:18 AM	Approval	http://inst1:8080/SMFeeApp/Default?tenant=default&cor	
332	SBC\CAROLINE	SBC\BETTY	Sales Order 2002 requires your approval.	11/3/2023 9:16 AM	Approval	http://inst1:8080/SMFeeApp/Default?tenant=default&cor	
331	SBC\CAROLINE	SBC\BETTY	Sales Order 2001 requires your approval.	11/3/2023 8:33 AM	Approval	http://inst1:8080/SMFeeApp/Default?tenant=default&cor	
330	SBC\CAROLINE	SBC\BETTY	Sales Order 1002 requires your approval.	11/3/2023 8:27 AM	Approval	http://inst1:8080/SMFeeApp/Default?tenant=default&cor	