

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.

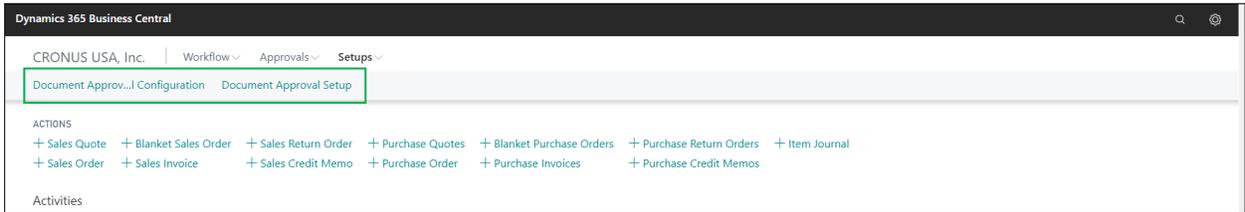
2 System Requirements

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.

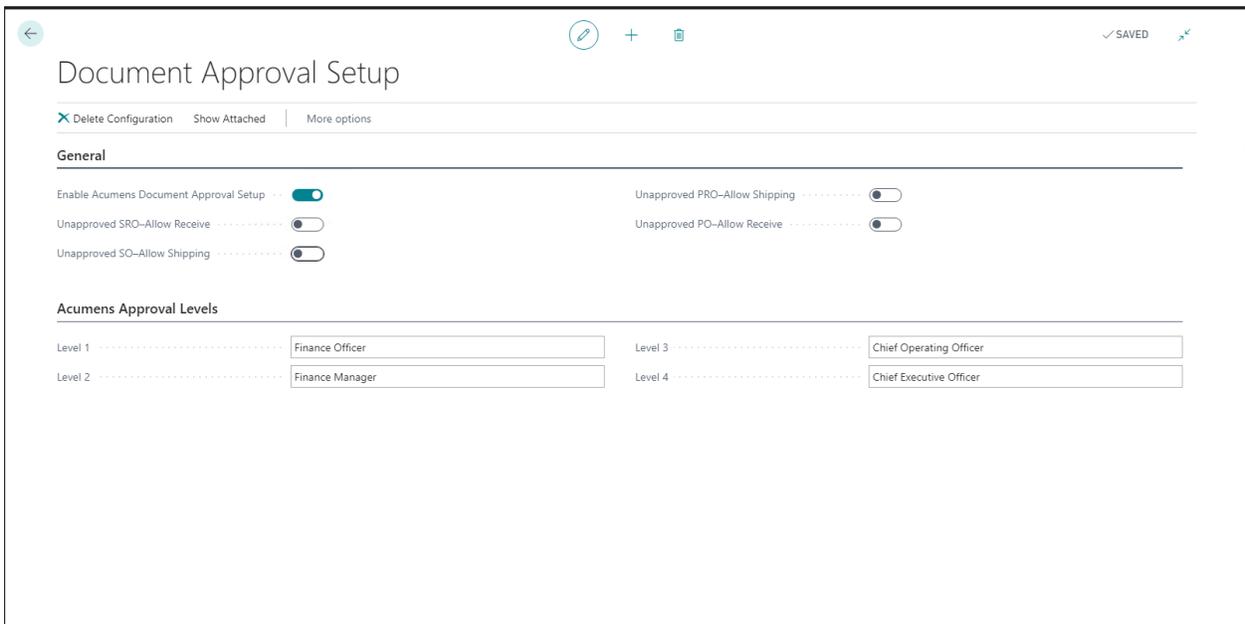
Acumens Document Approvals Management requires Microsoft Dynamics 365 Business Central version 14.00 or later and works with all BC365 clients (Dynamics NAV Web Client, Dynamics NAV Tablet Client, Dynamics NAV Phone Client (in a Browser) and Dynamics NAV Universal App)

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"/>

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 Finance Officer Level 3 Chief Operating Officer

Level 2 Finance Manager Level 4 Chief Executive Officer

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 | APPROVAL USER SETUP | WORK DATE: 11/23/2023

Notification Setup

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... REDU... APPR...	SUBSTITUTE	E-MAIL	APPR... ADML...
SBC\ADMINISTR...				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	SBC\BETTY	caroline@sbdynamicserp.com	<input type="checkbox"/>
SBC\BERNARD		SBC\ADMINISTR...		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	SBC\SBCNAV	caroline@sbdynamicserp.com	<input type="checkbox"/>
SBC\BETTY				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	SBC\CAROLINE	caroline@sbdynamicserp.com	<input checked="" type="checkbox"/>
SBC\CAROLINE				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		caroline@sbdynamicserp.com	<input type="checkbox"/>
SBC\DIPAK				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		caroline@sbdynamicserp.com	<input type="checkbox"/>
SBC\IVAN				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		caroline@sbdynamicserp.com	<input type="checkbox"/>
SBC\LRUSH				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		caroline@sbdynamicserp.com	<input type="checkbox"/>
SBC\NILESH				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		caroline@sbdynamicserp.com	<input type="checkbox"/>
SBC\RICHARD				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	SBC\BETTY	caroline@sbdynamicserp.com	<input type="checkbox"/>
SBC\SBCNAV				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	SBC\CAROLINE	caroline@sbdynamicserp.com	<input type="checkbox"/>
SBC\VINCENT				<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		caroline@sbdynamicserp.com	<input type="checkbox"/>

Dynamics 365 Business Central

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

Notification Setup

Notification Schedule

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

E-MAIL

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

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.

The screenshot shows the Dynamics 365 Business Central Admin User Role Center for Document Approvals. The interface includes a navigation bar with 'Workflow', 'Approvals', and 'Setups' menus. Below the navigation bar, there are sections for 'Sales Approval Documents', 'Purchase Approval Documents', 'ITEM JOURNALS', and 'Gen-Journals'. Each section contains a grid of cards representing different approval stages and counts.

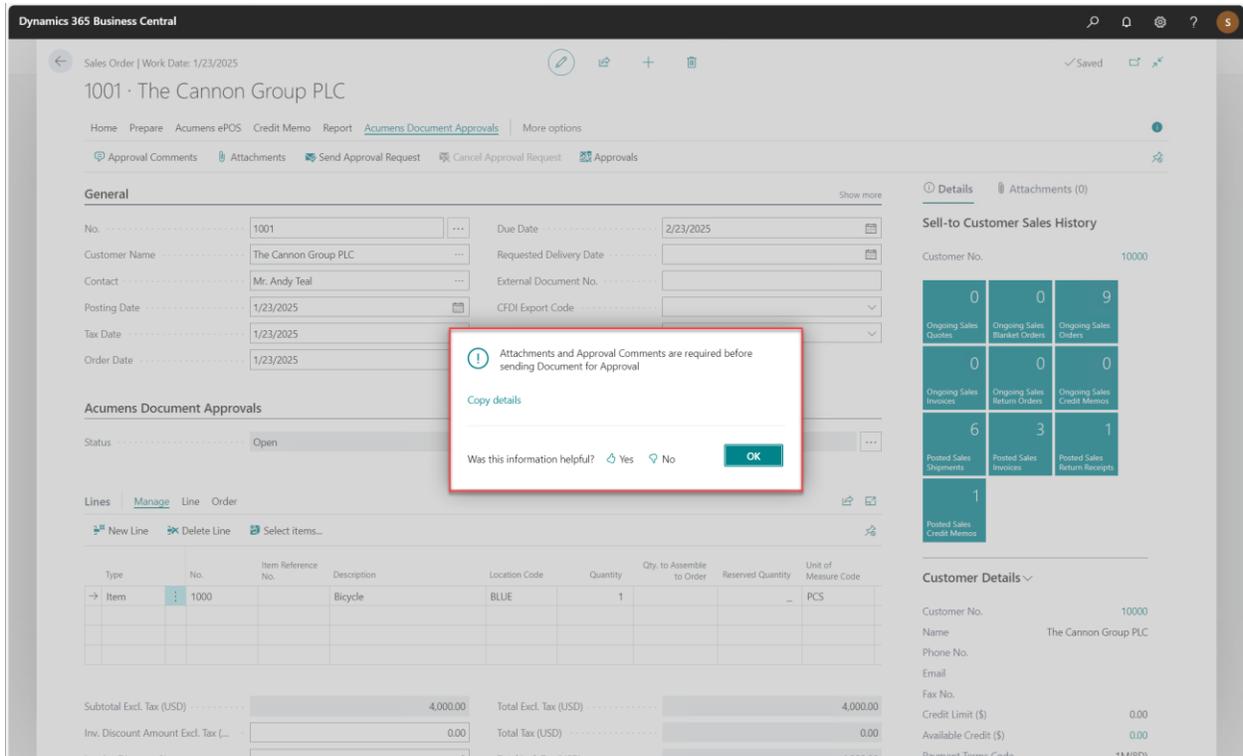
Sales Approval Documents							
Request to Approve	Pending Approvals	Finance Officer	Finance Manager	Chief Operatio... Officer	Chief Executive Officer	Fully Approved	Rejected
1	3	3	0	0	0	10	0

Purchase Approval Documents							
Request to Approve	Pending Approvals	Finance Officer	Finance Manager	Chief Operatio... Officer	Chief Executive Officer	Fully Approved	Rejected
0	0	0	0	0	0	7	0

ITEM JOURNALS			Gen-Journals		
Requests to Approve	Pending Approvals	Ready to Post	Requests to Approve	Pending Approvals	Ready to Post
0	0	1	0	0	1

3.2 Comments and Attachments

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



3.3 Dynamic Approval Levels:

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

Defined Levels:

Acumens Approval Levels

Level 1	Finance Officer	Level 3	Chief Operations Officer
Level 2	Finance Manager	Level 4	Chief Executive Officer

Defined levels per Document:

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

2004 · The Cannon Group PLC

Home 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

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

Home Prepare 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	<input type="text" value="The Cannon Group PLC"/>	Due Date	<input type="text" value="2/23/2025"/>
Contact	<input type="text" value="Mr. Andy Teal"/>	Requested Delivery D...	<input type="text"/>
Posting Date	<input type="text" value="1/23/2025"/>	External Document No.	<input type="text"/>
Tax Date	<input type="text" value="1/23/2025"/>	CFDI Export Code	<input type="text"/>
Order Date	<input type="text" value="1/23/2025"/>	CFDI Period	<input type="text" value="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

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

1002 · The Cannon Group PLC

Home Prepare Acumens ePOS Credit Memo Report Acumens Document Approvals More options

Approval Comments Attachments Send Approval Request Cancel Approval Request Approvals

General

Show more

No.	<input type="text" value="1002"/>	Due Date	<input type="text" value="2/23/2025"/>
Customer Name	<input type="text" value="The Cannon Group PLC"/>	Requested Delivery D...	<input type="text"/>
Contact	<input type="text" value="Mr. Andy Teal"/>	External Document No.	<input type="text"/>
Posting Date	<input type="text" value="1/23/2025"/>	CFDI Export Code	<input type="text"/>
Tax Date	<input type="text" value="1/23/2025"/>	CFDI Period	<input type="text" value="Diario"/>
Order Date	<input type="text" value="1/23/2025"/>		

Acumens Document Approvals

Status Pending Approval Approval Status Finance 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...)	<input type="text" value="4,000.00"/>	Total Excl. Tax (USD)	<input type="text" value="4,000.00"/>
Inv. Discount Amount...	<input type="text" value="0.00"/>	Total Tax (USD)	<input type="text" value="0.00"/>

Search Delegate Record Comments Show

Overdue	Details	Sequence No.	Status	Sender ID	Salespers./... Code	Approver ID	AOD 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

Description

AQD Document Type ▼

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

1003 · The Cannon Group PLC

Home Prepare Acumens ePOS Credit Memo Report Acumens Document Approvals More options

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:

The screenshot displays a Sales Order form for '1005 · The Cannon Group PLC' with a work date of 1/23/2025. The 'Acumens Document Approvals' section shows the status as 'Released', which is highlighted with a red box. The 'General' section includes fields for Customer Name, Contact, Posting Date, Tax Date, Order Date, Due Date, Requested Delivery Date, External Document No., CFDI Export Code, and CFDI Period. The 'Lines' section contains one line item: a 'Bicycle' with a quantity of 1, unit price of 4,000.00, and a total tax of 200.00. The summary section shows a subtotal of 4,000.00, a total tax of 200.00, and a total inclusive tax of 4,200.00.

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)	4,000.00	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

Post shipment:

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

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

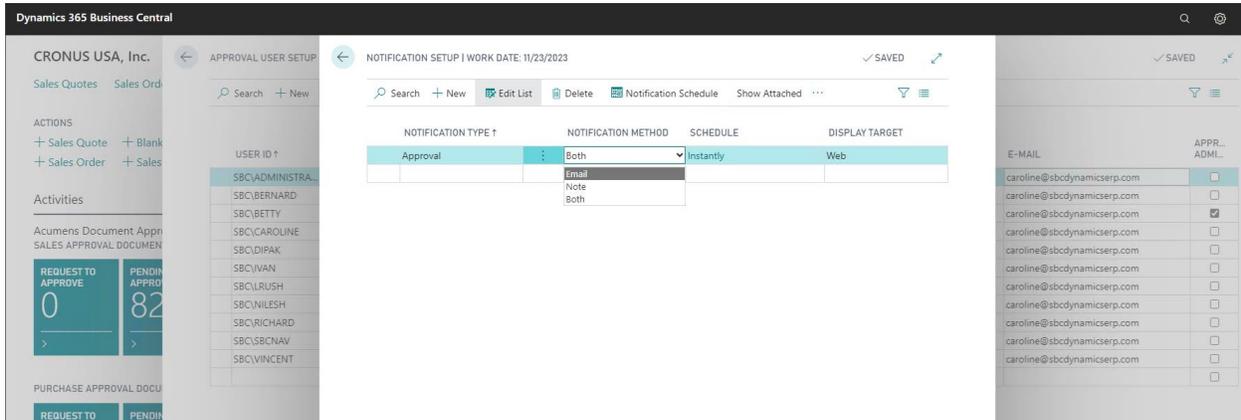
New Line Delete Line Select Items...

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 P
→ Item		PCS	4,000.00	ATLANTA, GA	SUPPLIES		4,000.00	4,200.00		1	1		

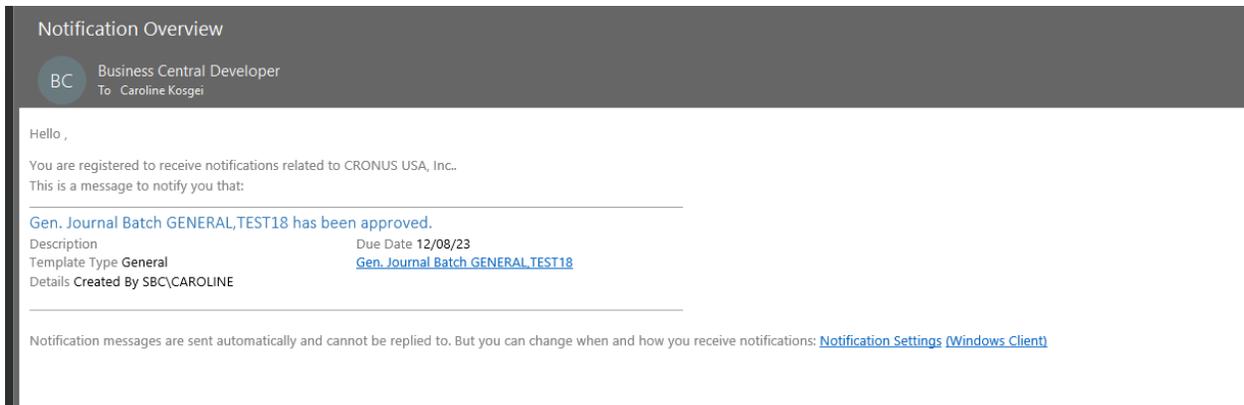
Subtotal Excl. Tax (USD)	4,000.00	Total Excl. Tax (USD)	4,000.00
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	200.00
Invoice Discount %	0	Total Incl. Tax (USD)	4,200.00

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:

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://mst1:8080/SMFeeApp/Default?tenant=default&ccor
344	SBC\CAROLINE	SBC\BETTY	Sales Order 1002 requires your approval.	11/3/2023 9:27 AM	Approval	http://mst1:8080/SMFeeApp/Default?tenant=default&ccor
342	SBC\CAROLINE	SBC\BETTY	Sales Order 2003 requires your approval.	11/3/2023 9:24 AM	Approval	http://mst1:8080/SMFeeApp/Default?tenant=default&ccor
334	SBC\CAROLINE	SBC\BETTY	Sales Order 1002 requires your approval.	11/3/2023 9:18 AM	Approval	http://mst1:8080/SMFeeApp/Default?tenant=default&ccor
332	SBC\CAROLINE	SBC\BETTY	Sales Order 2002 requires your approval.	11/3/2023 9:16 AM	Approval	http://mst1:8080/SMFeeApp/Default?tenant=default&ccor
331	SBC\CAROLINE	SBC\BETTY	Sales Order 2001 requires your approval.	11/3/2023 8:33 AM	Approval	http://mst1:8080/SMFeeApp/Default?tenant=default&ccor
330	SBC\CAROLINE	SBC\BETTY	Sales Order 1002 requires your approval.	11/3/2023 8:27 AM	Approval	http://mst1:8080/SMFeeApp/Default?tenant=default&ccor